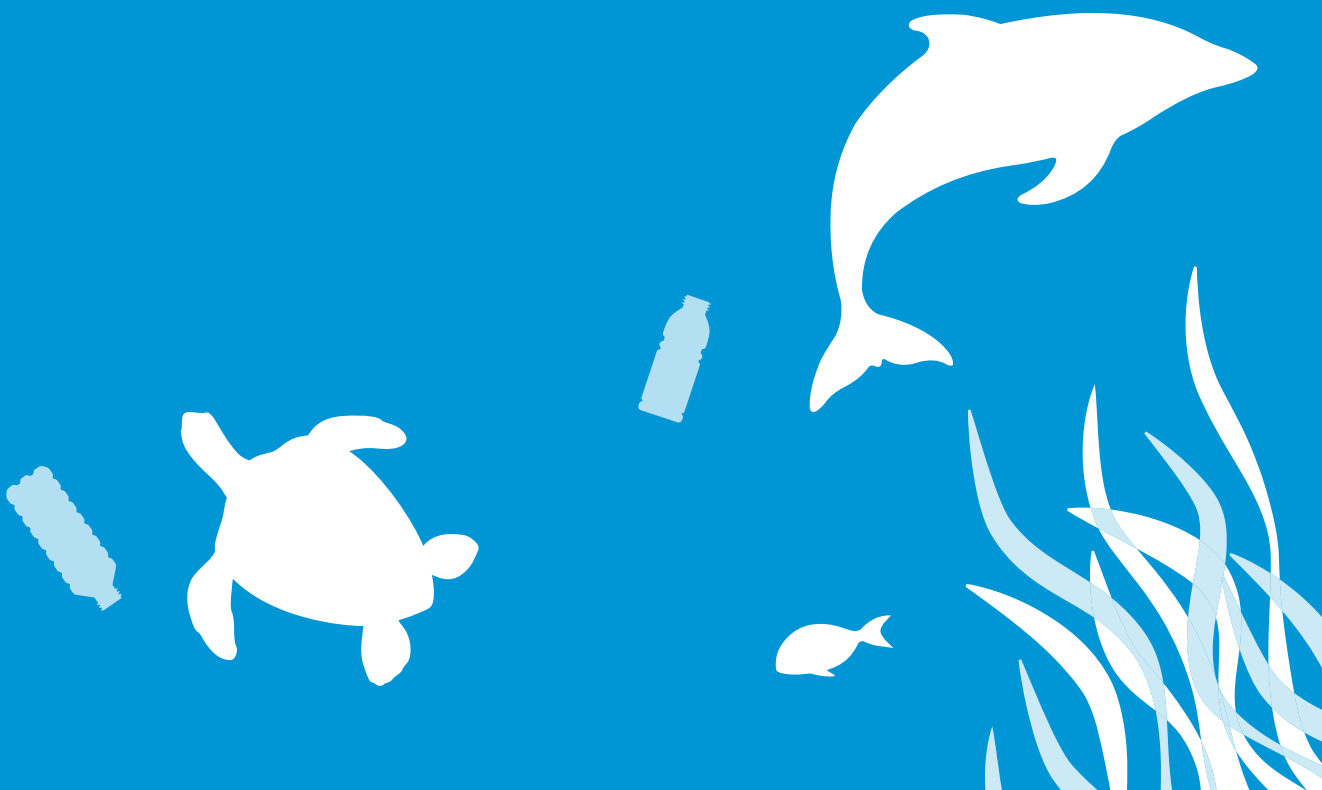




HP Australia Environmental Sustainability Study 2018

In partnership with



Introduction

In June 2018, HP Australia and Planet Ark jointly embarked on a survey of Australian consumers and businesses to unearth the perceptions, values and behaviours that drive the country's approach to environmental sustainability.

Conducted by PHD Research, The HP Australia Environmental Sustainability Study 2018 offers a comprehensive look at how Australians perceive themselves to be responding to the world's most pressing environmental challenges, ranging from climate change to plastic pollution and marine conservation.

Beginning with a snapshot of Australians' overall environmental concerns, this study delves into six high-profile sustainability issues to uncover the rise of plastic waste in marine environments as the most important sustainability issue in the eyes of both Australian consumers and businesses.

The HP Australia Environmental Sustainability Study 2018 continues on to explore how perceptions and actions surrounding environmental sustainability are impacted by generational factors, and unpacks the commercial importance of sustainability for brands.

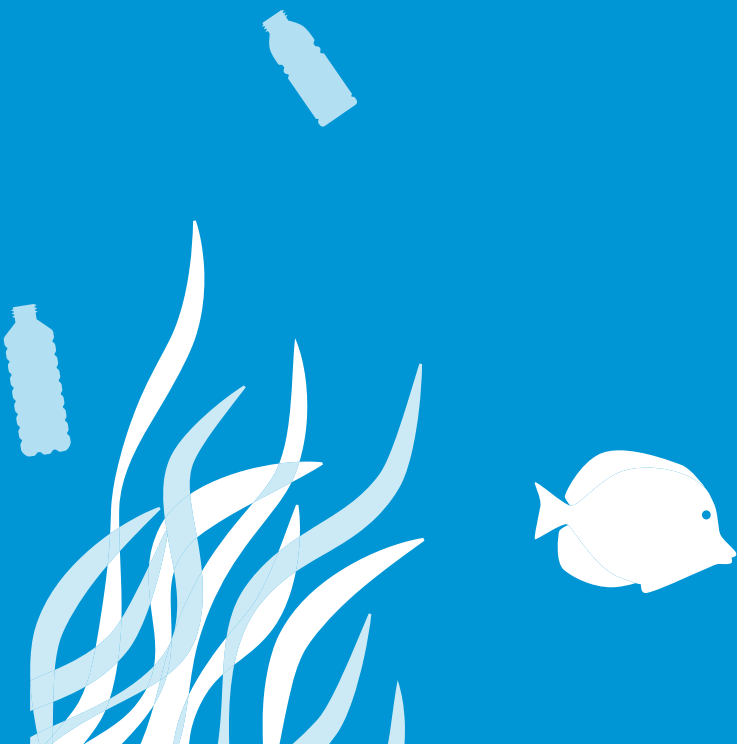
Through this research, HP and Planet Ark hope to educate and empower Australians on making a positive impact on the environment, while encouraging businesses to lead in delivering the sustainable products and services that Australians expect.

Over the last 75 years, HP has been an industry leader in reducing its impact on the environment. From launching its first recycling program in 1987 to developing innovative energy-efficient technology today, HP continues its commitment to environmental responsibility. To find out more about HP's commitment to sustainability visit

hp.com/sustainableimpact



Research methodology



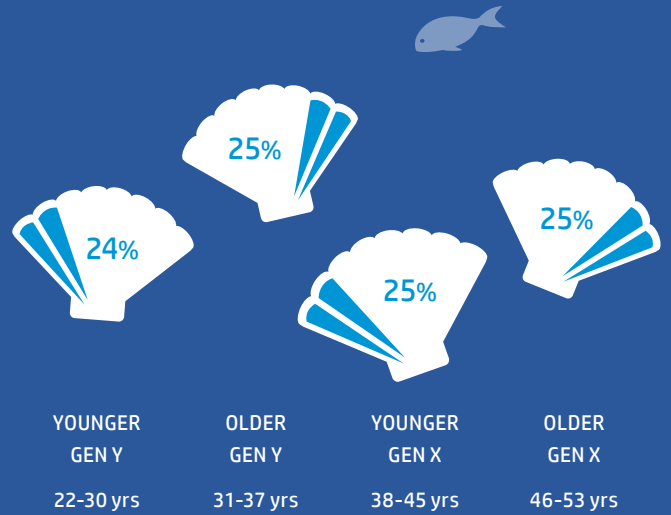
Sample profile:



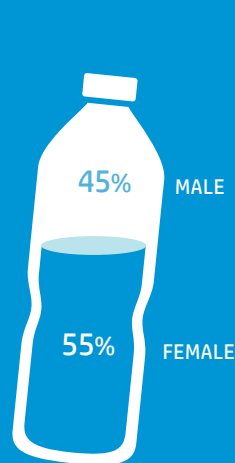
Australian consumer

Our consumer sample is in line with the market though survey focus is Gen Y and Gen X (even split).

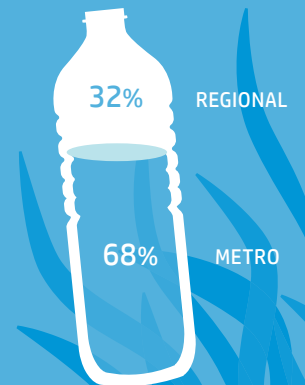
Age



Gender



Location



Region



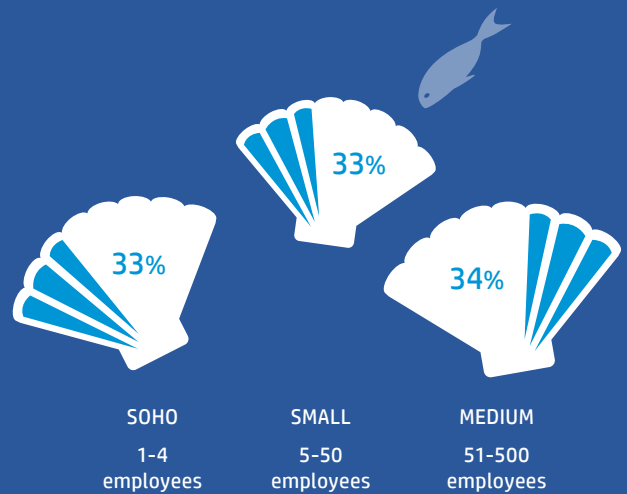
Sample profile:



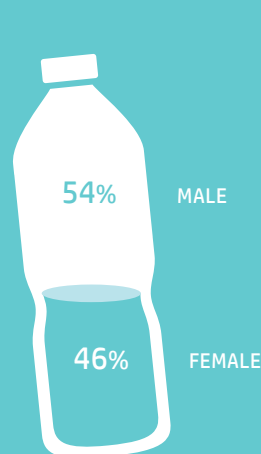
Australian business

Our business sample in this study has been weighted to be representative of the business organisation size by number of employees.

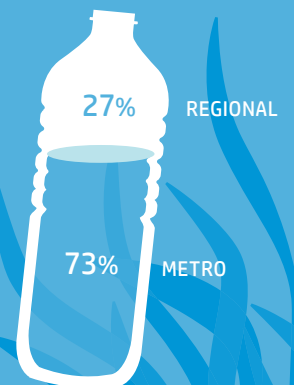
Size



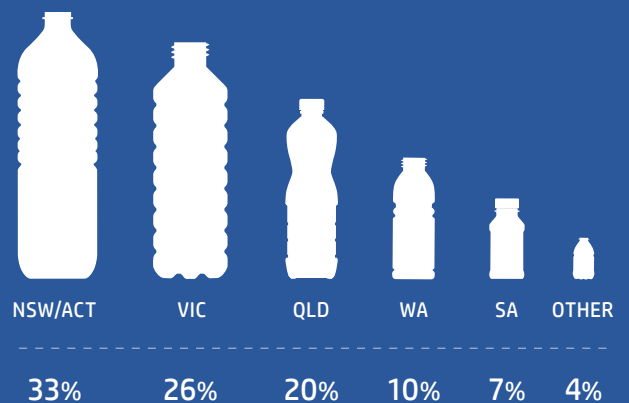
Gender



Location

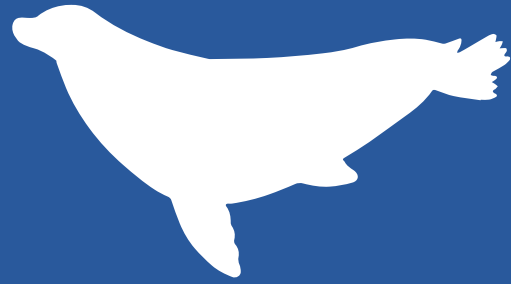


Region



Question: Demographic questions
Base: Business n=616 (unweighted)





Insights:

Understanding the attitudes and behaviours of Australian consumers and businesses towards environmental sustainability.





Almost all Australians are concerned about the environment and sustainability but only half believe they are doing enough.



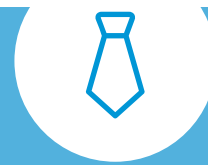
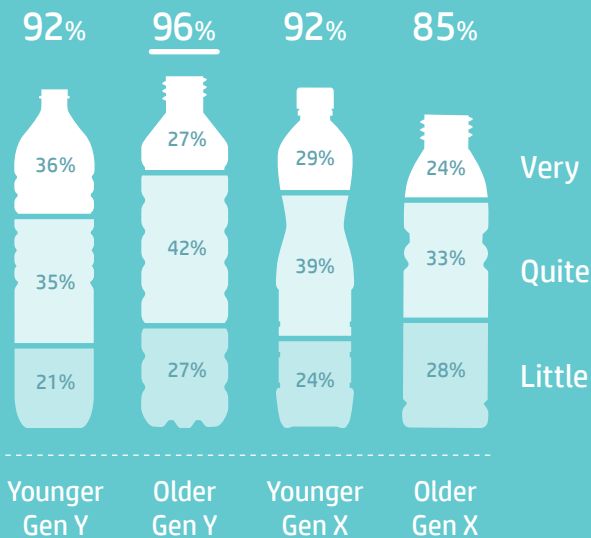
Almost all Australians are concerned about the environment and sustainability.

Gen Y and Medium-sized businesses express the most concern while older Gen X and SoHo show the least concern.



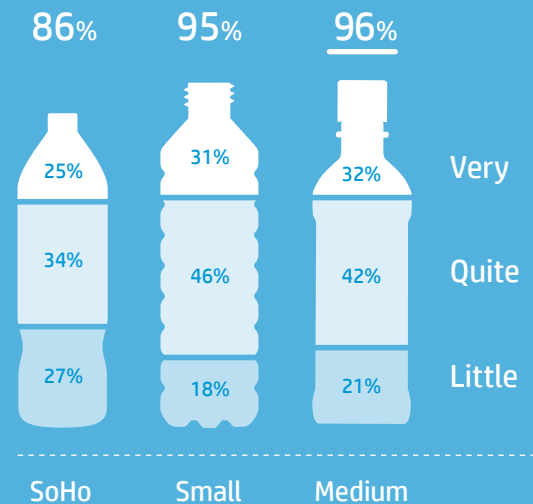
Consumer
91%

Level of concern



Business
92%

Level of concern

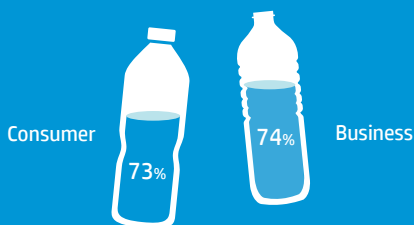


Question: A1 Thinking just about your attitudes to the environment and sustainability and your impact on it. How concerned are you generally about the environment and sustainability?

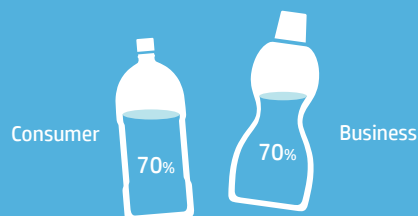
Base: Consumer n=1010 (weighted): Younger Gen Y n=247, Older Gen Y n=255, Younger Gen X n=256, Older Gen X n=252, Business n=616 (weighted) SoHo n=206, Small n=208, Medium n=311

Australian consumers and businesses rank plastic in oceans, landfill waste and natural environments as their top three concerns when it comes to the environment and sustainability.

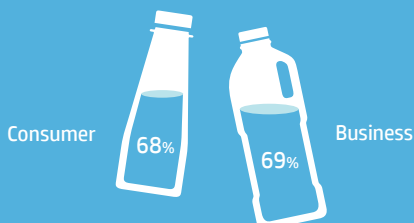
Plastic in oceans



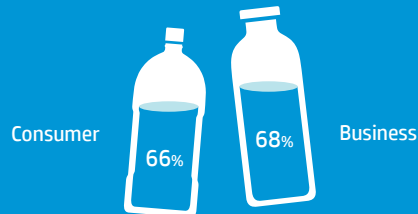
Waste going to landfill



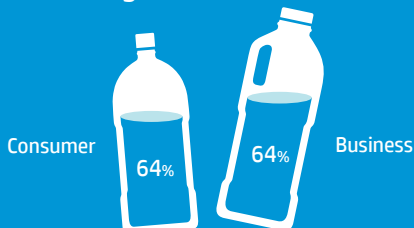
Natural environments



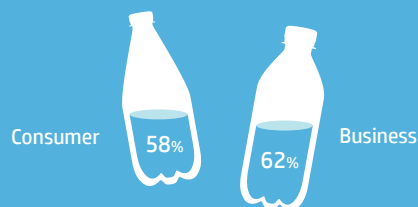
Animals and species conservation



Climate change



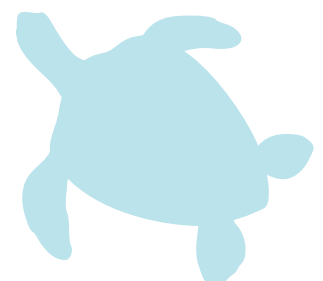
Air quality



Question: A1a Which of these aspects of the environment and sustainability are you concerned about?

Base: Those with some concern: Consumer n=922, Business n=568

Note: For consumers, plastic in oceans concerns them significantly more than all other areas except landfill. For Business, plastic in the ocean concerns them significantly more than animals/species conservation, climate change and air quality



When it comes to plastic pollution, there are consistent and high levels of concern about the environment and sustainability.

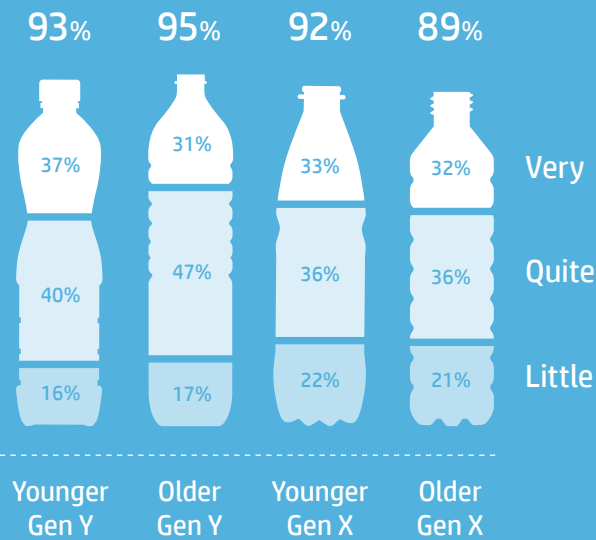


Consumer
92%

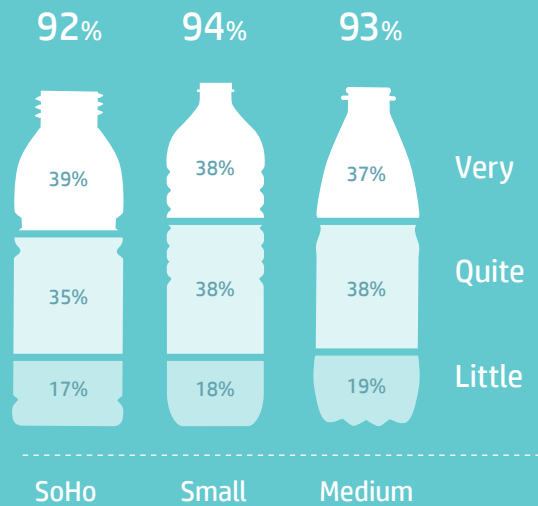


Business
93%

Level of concern

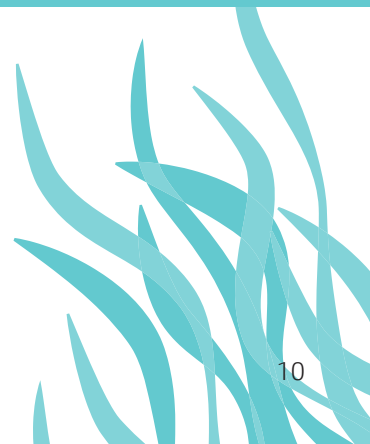


Level of concern



Question: A1c Now thinking specifically about your attitudes to plastic pollution and your impact on it. How concerned are you generally about plastic pollution?

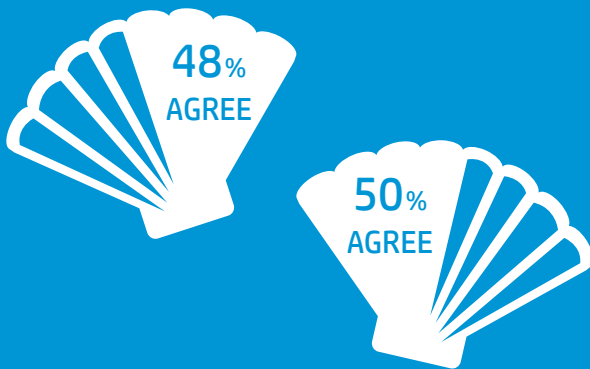
Base: Consumer n=1010, Younger Gen Y n=247, Older Gen Y n=255, Younger Gen X n=256, Older Gen X n=252, Business n=616, SoHo n=206, Small n=208, Medium n=311



Despite their high-levels of concern, only half of consumers and businesses think they do enough in their daily lives when it comes to sustainability.

A further 31% are neutral, indicating limited awareness around sustainable behaviour.

I think I do enough from a sustainability point of view in my everyday life

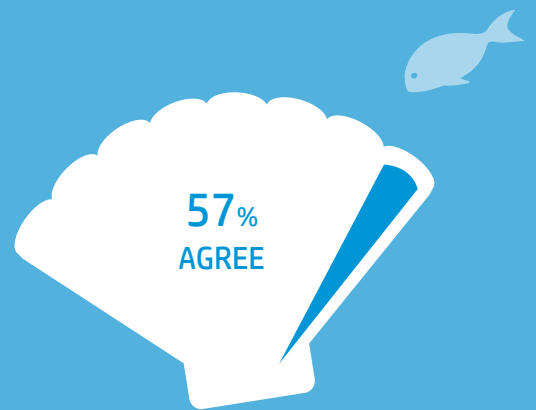


Consumer

Business

31% NEITHER AGREE NOR DISAGREE

I believe my business is doing enough in the sustainability space



Business

31% NEITHER AGREE NOR DISAGREE

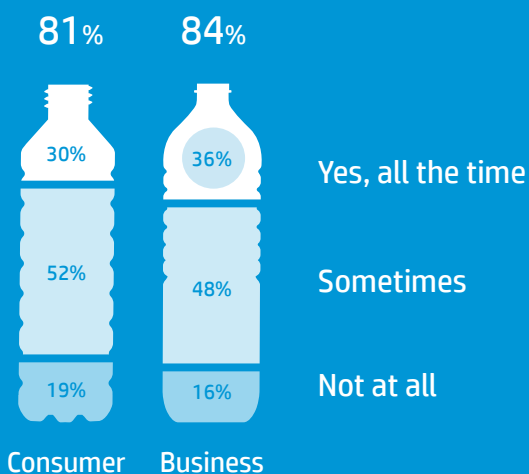
Question: A4 Below are some statement that people like you have said about sustainability. Please select how well each of these statements describes you (using a 5 point agree/neutral/disagree scale)

Base: Consumer n=1,010, Younger Gen Y n=247, Older Gen Y n=255, Younger Gen X n=256, Older Gen X n=252, Consumer males n=358, Consumer females n=551, Businesses n=616, SoHo n=206, Small n=208, Medium n=311, Business males n=331, Business Females n=285, Business Gen Y n=231, Business Gen X n=385

Many Australians associated printing with paper and the environment, but less thought about recycling the used cartridges.



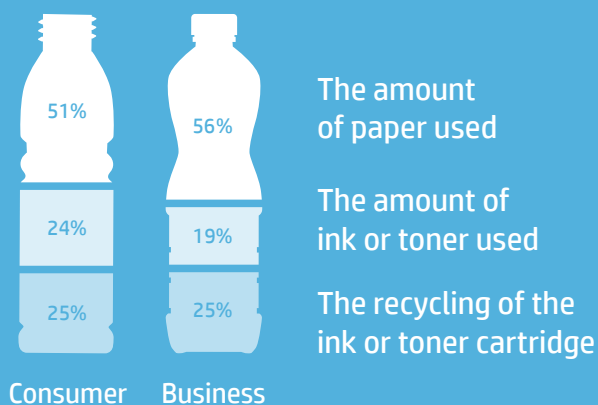
When you print documents do you think about the environment?



Detailed View:

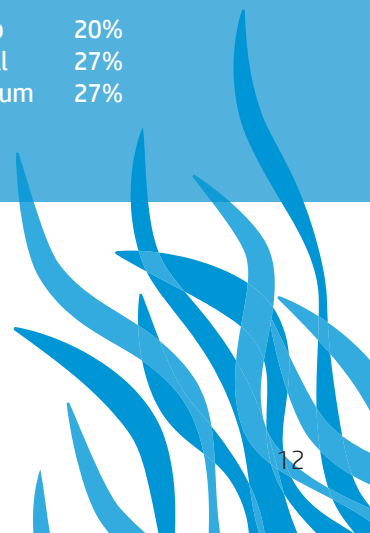
Younger Gen Y	86%	SoHo	78%
Older Gen Y	84%	Small	88%
Younger Gen X	84%	Medium	89%
Older Gen X	73%		

Which of these does this mostly relate to?



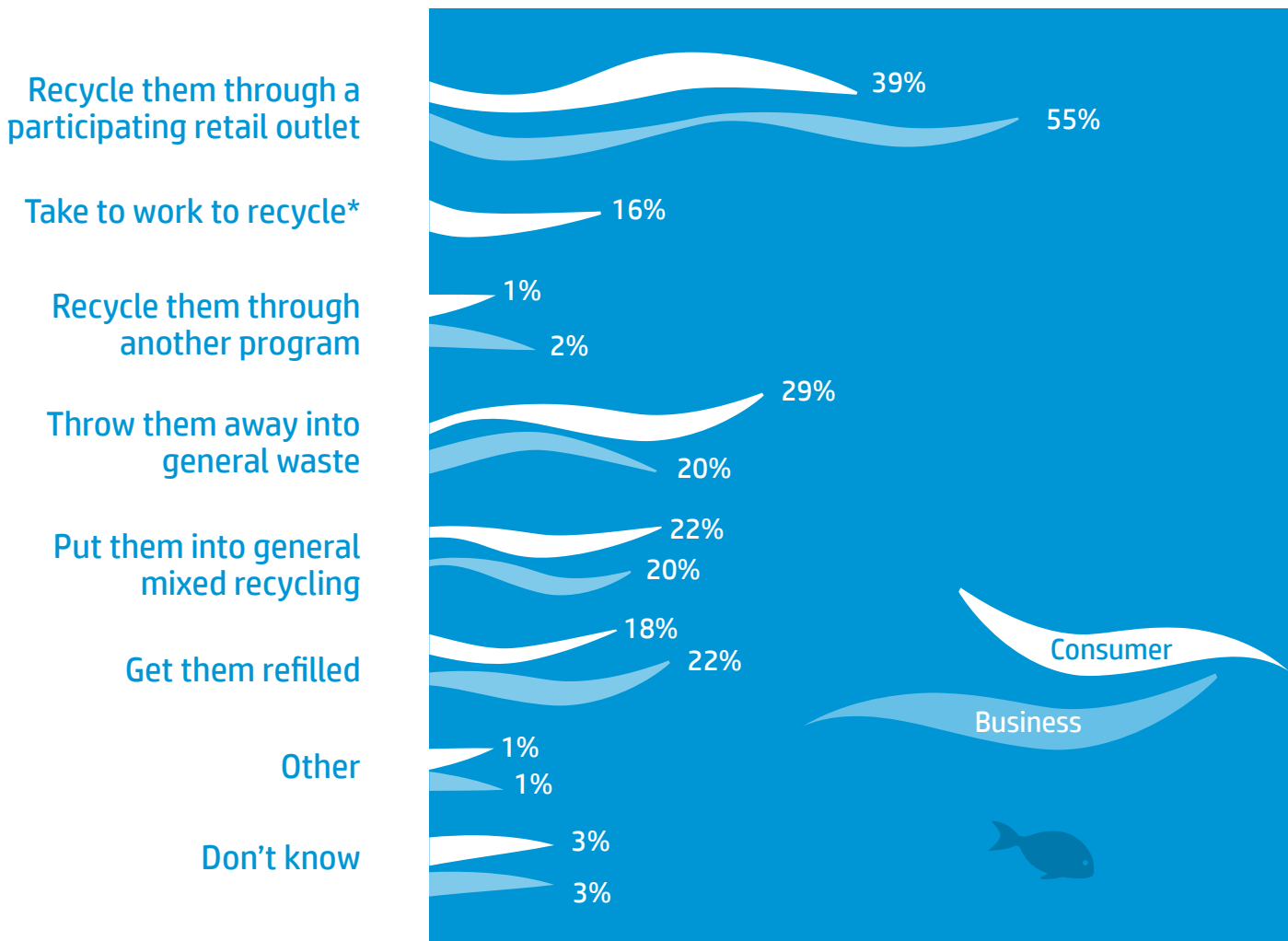
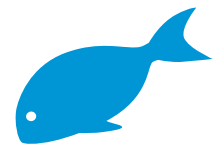
Detailed View:

Gen Y	26%	SoHo	20%
Gen X	23%	Small	27%
		Medium	27%



And this is reflected in their behaviour with just half of consumers disposing of cartridges correctly.

Australian consumers tend to go wrong more often than businesses when recycling ink cartridges. Only 50% of consumers recycled their cartridges correctly - this was 57% across business.



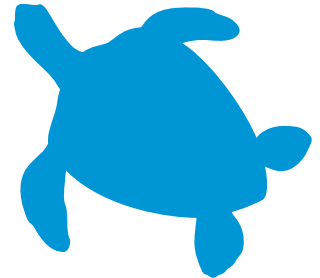
Question: C4 What do you usually do with your used ink and/or toner cartridges?
 Base: Consumer n= 1010, Businesses n= 616
 Note: *Only asked for Consumer sample. No significant differences for Business subsample.



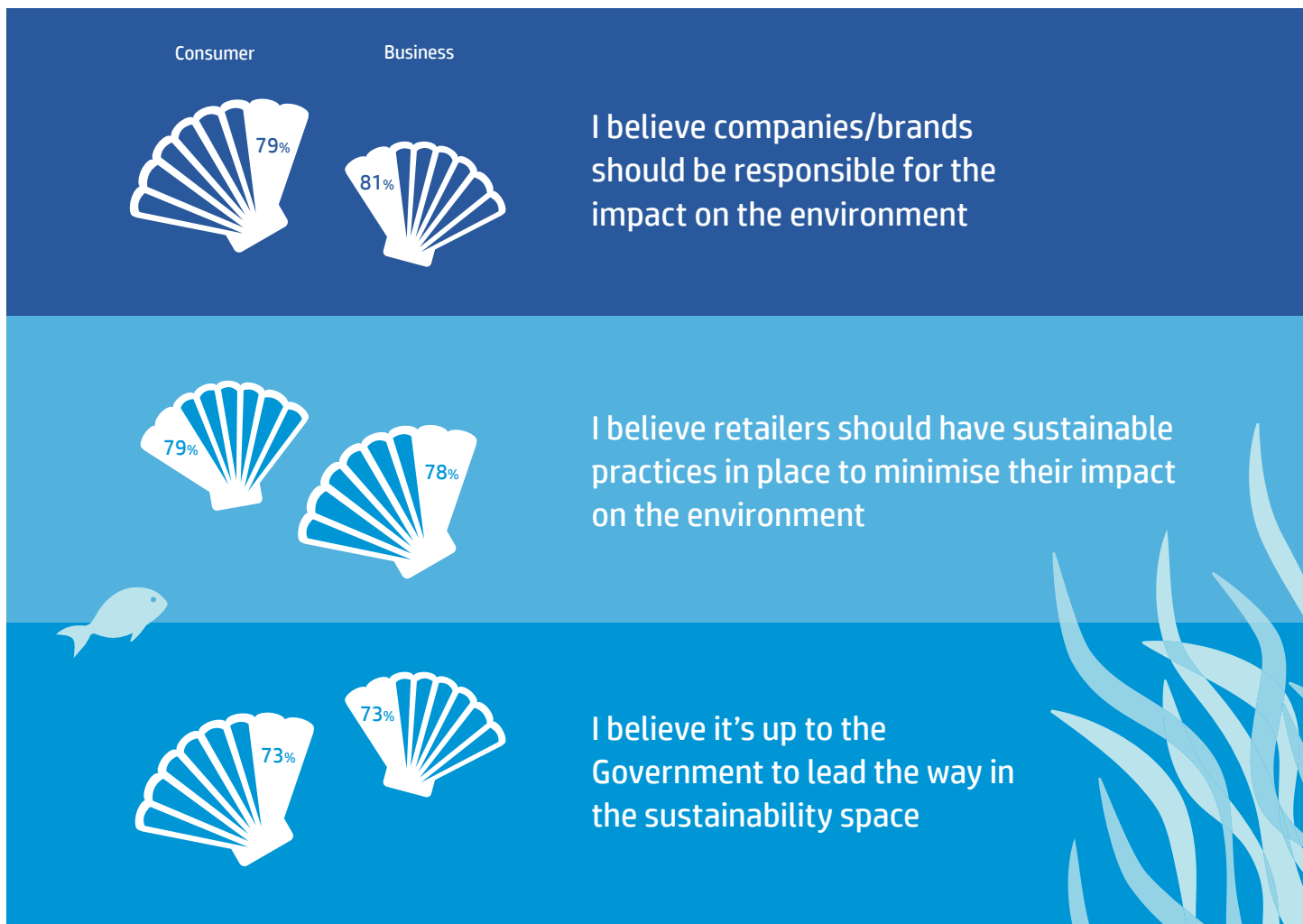
Australian consumers are now looking to businesses and brands when it comes to action on environmental sustainability.



Companies, brands and retailers are seen to be the organisations most responsible for the impact on the environment.



Who is responsible for environmental and sustainability issues?

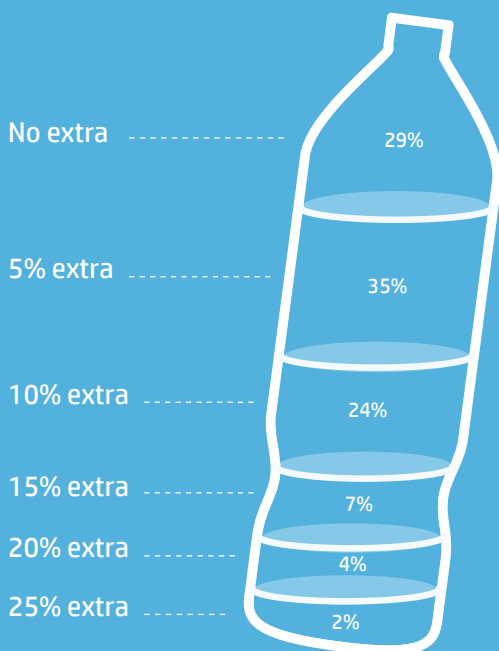


Question: A4 Below are some statements that people like you have said about sustainability. Please select how well each of these statements describes you (5 point agree/neutral/disagree scale)
Base: Consumer n=1,010, Businesses n=616
Note: significant differences are within audience showing companies/brands/retailers significantly higher vs government and personal impact

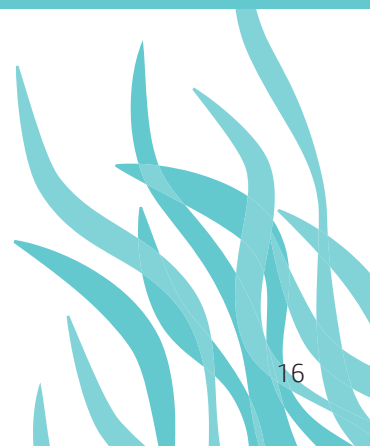
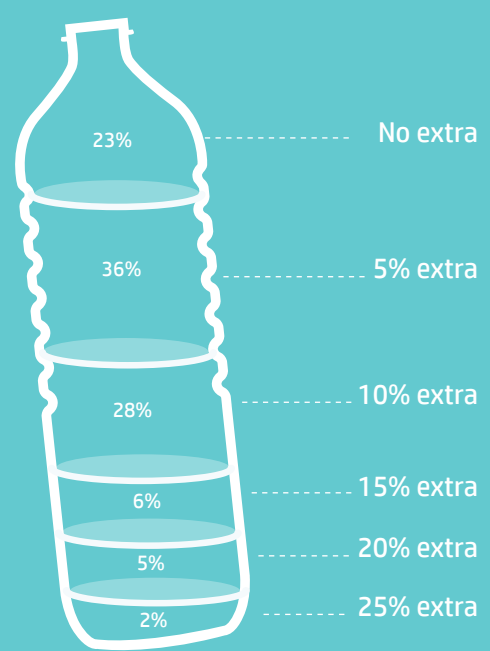
Australian consumers and businesses claim they are willing to pay extra for sustainable products.

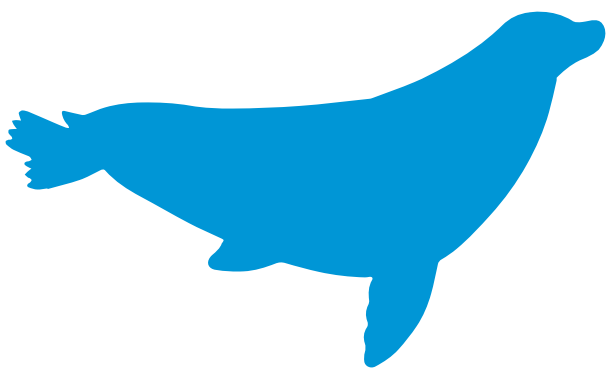


Consumer
71%



Business
77%

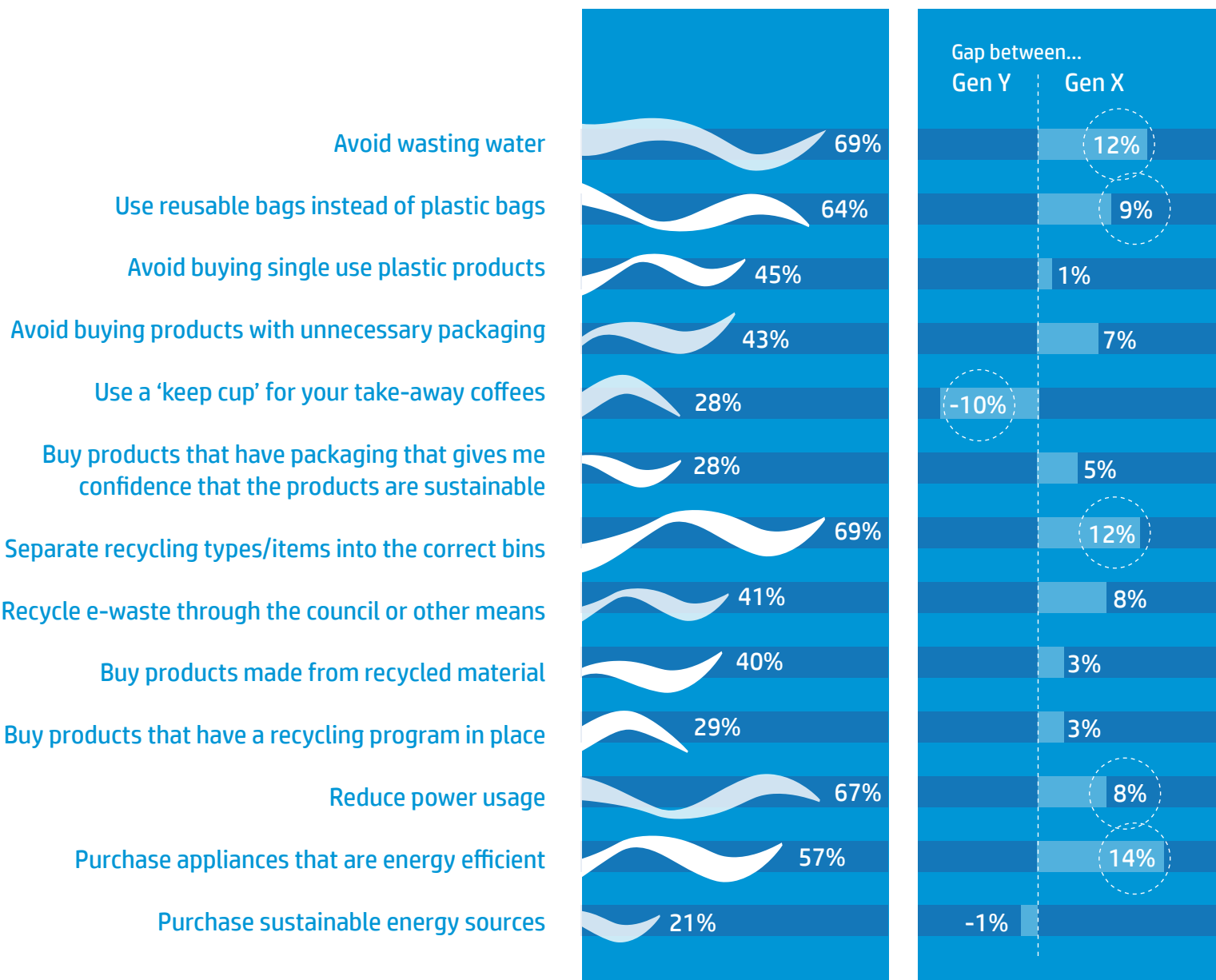




Gen Y express more concern about the environment, but Gen X are more proactive.



Despite Gen Y expressing more concern about the environment and sustainability, Gen X are the more active in terms of taking action to minimise their impact on the environment.

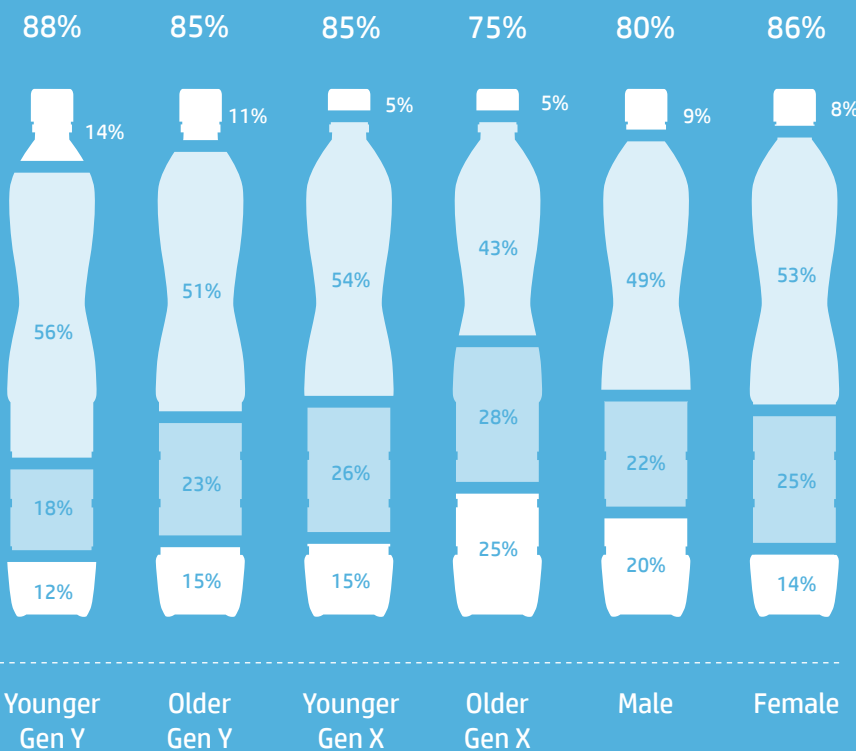


Question: A2 CONSUMERS: Which of these do you currently do in your home to minimise your impact on the environment and improve sustainability? BUSINESS: Which of these do you currently do in your business to minimise your impact on the environment and improve sustainability? Base: Consumers n=1,010, Gen Y n=502, Gen X n=508, Male n=458, Female n=551

Still, it is the Gen Ys who are more likely to state a strong preference for or a willingness to only work for a company that has sustainable practices.



Consumer



I would only work for a company that has sustainable practices

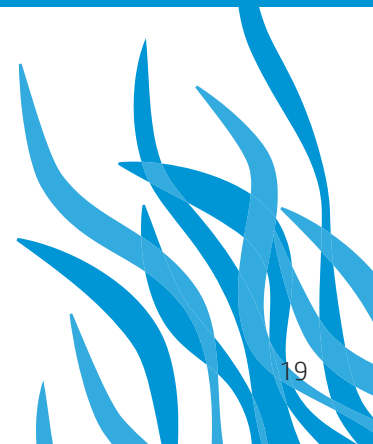
I would strongly prefer to work for a company that has sustainable practices

I would slightly prefer to work for a company that has sustainable practices

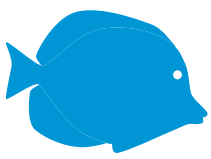
I would not consider sustainable practices; other factors are more important to me

Question: A6 If you were looking for a new job, which of the following best describes you?

Base: Younger Gen Y n=247, Older Gen Y n=255, Younger Gen X n=256, Older Gen X n=252, SoHo n=206, Small n=208, Medium n=311, Consumer males n=358, Consumer females n=551, Business males n=331, Business Females n=285, Business Gen Y n=231, Business Gen X n=385



Despite Medium-sized businesses expressing more concern about the environment and sustainability, SoHo have more considered behaviour and are more likely to recycle and avoid buying products with unnecessary packaging.



Avoid wasting water

Use reusable bags instead of plastic bags

Avoid buying single use plastic products

Avoid buying products with unnecessary packaging

Use a 'keep cup' for your take-away coffees

Buy products that have packaging that gives me confidence that the products are sustainable

Separate recycling types/items into the correct bins

Recycle e-waste through the council or other means

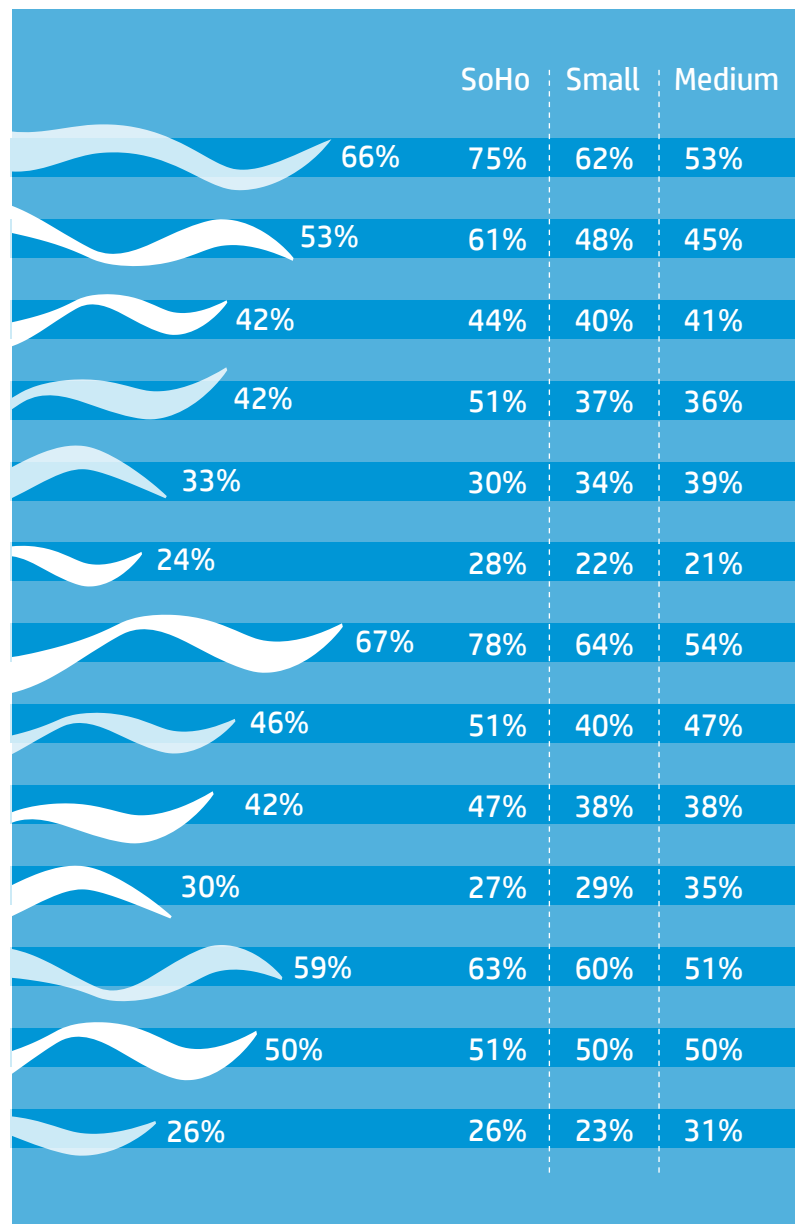
Buy products made from recycled material

Buy products that have a recycling program in place

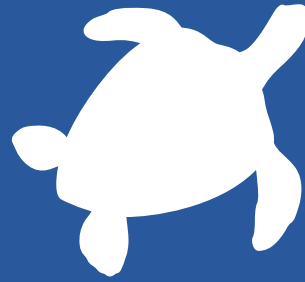
Reduce power usage

Purchase appliances that are energy efficient

Purchase sustainable energy sources



Question: A2 CONSUMERS: Which of these do you currently do in your home to minimise your impact on the environment and improve sustainability? BUSINESS: Which of these do you currently do in your business to minimise your impact on the environment and improve sustainability? Base: Business n=616, SoHo n=206, Small n=208, Medium n=311, HP Customers



About HP and Planet Ark:

Sustainable impact is at the heart of HP's reinvention journey. HP has long recognised that corporations are expected to do more than just generate profit – they are expected to use their resources to advance important societal causes, champion values, and be a beacon of trust for industries, governments, and communities around the world.

For over 15 years, HP has been publicly reporting against a broad range of sustainability commitments under areas of: Planet, People and Community.

In 2017, as part of HP's push for a more efficient, circular economy, 18,000 tonnes of recycled plastic were used in HP products, and 99,000 tonnes of recycled plastic were used in Original HP ink and toner cartridges.

Planet Ark is one of Australia's leading organisations promoting environmental behaviour change. For more than two decades, Planet Ark has helped people, governments and businesses reduce their impact on the environment by promoting sustainable resource use, encouraging a low carbon lifestyle, and connecting people with nature.

Since 2003, HP has been a founding member of the 'Cartridges 4 Planet Ark' program. In 2017, HP and Planet Ark announced that more than 10 million ink cartridges had been recycled through this joint initiative.

For more on Cartridges 4 Planet Ark and how you can participate, visit: cartridges.planetark.org

For more information on HP's global commitment to environmental sustainability and to read our full 2017 Sustainable Impact Report, visit: hp.com/sustainableimpact

