

**TITLE OF CASE STUDY:** HP IPG Campaign: From Listening to “What do you Have to Say?”

**The business situation:** 20 years of printing leadership worldwide. 446 million printers sold. Dominant and growing market share. \$7 billion in business growth in 5 years. Leadership in imaging and printing intellectual property. What more could HP’s Imaging and Printing Group wish for?

Yet, in 2006, the future did not look so bright. The market was saturated: home penetration of computers (the historic driver of printer sales) was stagnant at 70%. Printers were becoming commoditized to disposable machines with expensive supplies. And people had found ways to Internet publish without printing; the more content they generated, the more they were posting and sharing online. Was the Internet about to make printing obsolete?

With these challenges in mind, HP IPG set itself a key goal: revive people’s interest in printing to guarantee future growth. It was a new kind of demand generation; printer sales would no longer be the immediate objective—they would be the consequence of people wanting to print more and better. Goals were simple:

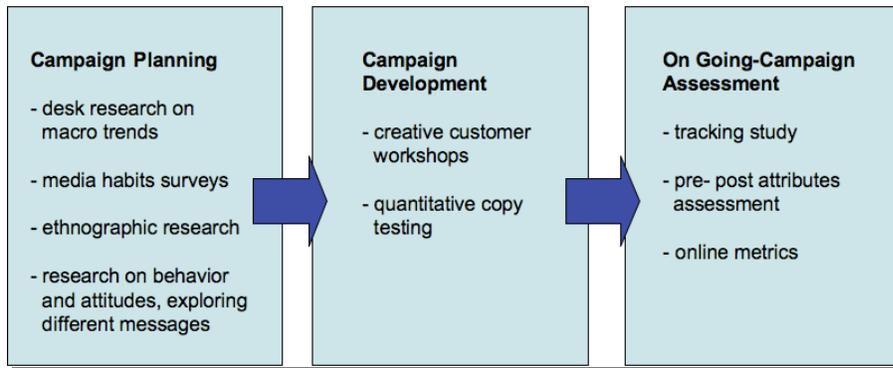
1. **Get people to print more pages.**
2. **Expand perceptions of HP from a printer brand to a printing brand.**
3. **Create excitement and interest around printing.**

But how to do this when behavior and attitudes were moving in the opposite direction? A program of research provided us with an evolving series of answers and provided us with an evolving series of answers and a platform to discover innovative ways of overcoming the barriers to the revolutionary reframing of our business and communication strategy.

#### **A research plan—incrementalism not, “aha”**

This paper outlines the US research plan for what became the groundbreaking “*What do you have to say?*” campaign. Throughout its development, different research techniques were used, complementing each other to provide both high-level inspiration and detailed analysis.

It’s important to stress at the outset that we did not find a single “open sesame” moment—this is not about a “revolution in research”. Rather, each wave of research answered questions and prompted more so that the entire process was based on incremental understandings and linked moments of truth. Essentially, it was conducted in three linked but separate waves:



## Research for Campaign Planning: “Print 2.0”

Part of the initial challenge was ensuring we understood what *printing* (rather than printers) meant to people. We decided to revisit all our printer-focused knowledge, looking for clues on how to generate interest in printing.<sup>1</sup>

### Desk research on social/media trends

A rich phase of desk research was a starting point that outlined three broad trends:

- a. **The exponential growth of *time spent online* in our highly connected world:** Conventional wisdom declared that our main initial audience (“busy moms”) was too, well, busy to be online. In fact, the vast majority was online at least once a day.
- b. **The shift from *PC-based to web-based printable material*:** Survey data showed that whereas in the early ‘00s printing was centered on applications such as spreadsheets, word documents and presentations, nearly half of all home printing was now sourced from the Internet.<sup>2</sup>
- c. **The extraordinary capacity for *digital content creation*:** “People who print” were passionate content creators. Both the need and the ability for creative self-expression struck us as offering amazing printing potential. Could we get people to be as enthusiastic about printing as they were about creating?

Research underlined that the Internet was not our competitor, but a powerful contributor to an interest in printing. **The Web should be at the core of our communication strategy** and at the heart of what HP called “the Print 2.0 revolution.”

### Ethnographic Research: Printing as connection?

The next stage of our research plan took us into the homes of families, chatting to moms and discovering where printing sits in their busy lives.<sup>3</sup>

The first and most significant understanding was that printing isn’t an isolated activity—it’s something that happens because *other people* accelerate it. Moms were more than moms—they were purposeful collaborators sharing with each other. They told us “*When you have kids, friendships grow really fast.*” And in telling us about the networks formed around their kids, they gave us examples of support, advice, validation and social stimulation from their group—all of which led to more printing.

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<sup>1</sup> Among others: Hall and Partners for Goodby, Silverstein & Partners – Moms Media Attitudes and Usage – July 2006 / Trendcentral 2006 Trendwatch Report / Forrester Technographics 2006 / HP internal research: End-user Panel, wave 10 / RS Consulting Market share study, August 2006 / IDC 2006 reports

<sup>2</sup> See attachment #2 Printing from the Internet

<sup>3</sup> The modern mom – Goodby, Silverstein & Partners presentation to HP, December 2006; see attachment #3 Ethnographic Research References

Printing expressed a powerful need for connection: invitations, photographs, sports schedules, travel journals, recipes, maps, thank you cards, engagement calendars school newsletters. This was not the occasional capture of a special moment to be remembered. These were tools to keep in touch and share with other people. This was printing as a social act, not just a personal one.

The Internet was the key facilitator to social connection either via e-mail, specialized sites or virtual communities. We discovered a similar sense of connection in online communities and affinity groups—from pet-lovers to photographers, from travelers to geeks, from cooks to music lovers.

The study underlined an opportunity for an “emotional” repositioning for HP as an enabler of these connections and this was the seed of the campaign idea: **to empower people with ideas and tools that enhance communication and connection**. But were these findings relevant to other groups? Could we move beyond moms?

### **Printing Research: Confirming the hypothesis – “...a little piece of me”**

The time had come for a larger scale piece of research. Millward Brown conducted an extensive study<sup>4</sup> with consumers and small business owners. The objectives were to find out what people were printing, how they felt about it, their interest and inclination to print more and their response to different messaging ideas.<sup>5</sup>

Quantitative research confirmed our hypothesis from the ethnographic stage. Better communication and connection was a powerful angle for moms, dads and small business owners.

In particular, we were encouraged by how the research highlighted that no brand fully occupied the printing space: *“White space exists here, and it can be defined by HP.”*

The research also underscored how HP could more fully own the printing space. Both consumers and small businesses described printing as an opportunity to *“show my creative side,”* giving *“a feeling of accomplishment,”* even giving *“things more meaning.”* One participant declared: *“I put a little piece of me into each creation.”*

The pieces were beginning to add up—the influence of the Web + cocreation + the social accelerators to printing and self-expression. **Creativity and self-expression** were our ways to generate excitement about printing, and these ideas were relevant beyond our traditional target of moms.

### **STRATEGY AND CREATIVE DEVELOPMENT – “What do you have to say?”**

The creative brief had a clear objective—the campaign had to make something happen, to affect behavior, and not just translate a thought or generate a feeling. *“Printing is a way of expressing myself and sharing with others”* was a starting point. We emphasized the relevance of the

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<sup>4</sup> Millward Brown Printing Study for HP IPG – April 2007 – Invoke Illuminator Sessions (201 with consumers, 187 with small business)

<sup>5</sup> These covered a number of options such as: *“Printing helps me leave my mark”* or *“Printing helps me share my interests and passions with others”* or *“Printing helps me tell my story”*

Internet to draw customers through exclusive content and relevant material wherever they already were in the digital space.

*“What do you have to say?”* was the offspring of this idea – the campaign would do more than simply engage customers in a “printing conversation”; it would create *printing actions* by offering FREE tools, printable resources and templates. These would translate “helping to communicate and connect” into practice and get printers printing.

We employed a two-pronged Web strategy. We used inspiring achievers with inspiring printing (and printable) stories—Gwen Stefani, popular singer and fashion statement; Jake Burton, snowboarding entrepreneur; and Paula Sher, the designer behind highly distinctive brands. The key to each was not just that they were well-known (we didn’t want this to be HP’s “American Express” campaign)—but that they encouraged other people to do something by example. A dedicated microsite supported by traditional media<sup>6</sup> was developed for each achiever. The web strategy also involved projects with Flickr, Yahoo! and YouTube. Through the latter, Project Direct was launched in which aspiring young filmmakers were given both the opportunity to say what they had to say and printable tools and marketing materials to promote their creations.

## **B. Research for Campaign Development: “So, where’s the printer?”**

### Customer creative workshops

With creative work close to completion, we involved our customers in highly interactive and playful workshops,<sup>7</sup> where we asked participants to join us in imagining the Web experience and listened to their comments.

It was clear in these conversations that the new strategy sparked a revolution in people’s perceptions about HP. It was also clear that we were doing things in a campaign about printing that printers were not “supposed” to do. “Where is the printer?” was a recurring question that customers only answered via a new understanding of what HP was doing:

*“HP is branching out. This isn’t about selling yet another inkjet printer.”*

*“They are changing. I always thought of them as the square box type. This is more.”*

*“Most people already think of HP as printers, this is more of a Web-based thing.”*

It didn’t matter whether they had heard of or were fans of Gwen Stefani or Jake Burton. What they were seeing stimulated the wish for more ideas and printing projects. It was precisely that “excitement about printing” that we had hoped would spread from the campaign printing projects to hp.com Activity Center and the HP PrintStudio.

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<sup>6</sup> See attachment #5 – Media Plan

<sup>7</sup> Goodby, Silverstein and Partners – Chicago Groups for HP on What do you have to say campaign (Moms, Young Adults, Small, Micro business) – August 2007 (see Attachment 4 – Illustration from Creative Workshop)

## Copy testing

The Stefani and Burton commercials were copy tested by Millward Brown.<sup>8</sup> While convinced that this campaign was the most innovative ever produced for IPG, we needed to understand its performance in the context of the Link test methodology.

In copy testing, the “where’s the printer?” question grew louder. We searched the open-ended responses, and after reading customers’ input we were convinced that we needed to **ground our communication** by explicitly emphasizing all references to printing projects. When we saw the adjusted commercials we knew the work had grown—our customers had helped us make it better.

## **BUSINESS RESULTS**

### **C. Research for On-going Campaign Assessment**

#### **Result 1: Getting people to print more.**

The objective of stimulating printing required a new way of measuring results. The multi faceted nature, breadth and heavy online component of the campaign necessitated an innovative system, employing best-in-class online measurement capabilities.

The HP IPG Dashboard for online metrics aggregation was developed to aggregate data from DART,<sup>9</sup> Omniture,<sup>10</sup> publisher partners<sup>11</sup> and other research studies<sup>12</sup> and is complemented by additional custom analysis of Omniture data. The Dashboard provides regularly refreshed updates on exposure and engagement filtered according to specific questions – for example by country and by asset (e.g. the Gwen pod, or HP PrintStudio)<sup>13</sup>.

Thanks to the Dashboard, we know that **2,590,219** people have visited our online assets, with **489,109** downloads-to-print in the US<sup>14</sup>. All of this is incremental printing, stimulated by the campaign.

HP tracks other online assets without direct media support, such as the hp.com Activity Center and HP PrintStudio. Our hypothesis is that these assets benefit from the ripple effect of the “*What do you have to say?*” campaign. The HP Activity Center has **doubled** its average monthly downloads since launch, and the HP PrintStudio is reaching record traffic levels, specifically for its greeting cards, registering a promising 31% repeat visitors ratio.

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<sup>8</sup> Millward Brown Link Test – Gwen, Burton – September 2007

<sup>9</sup> OLA and search impressions, clicks

<sup>10</sup> Clicks from internal placements, engagements on campaign sites and related hp.com links

<sup>11</sup> e.g. Google, Yahoo! MSN - Impressions, clicks for site-served placements. Offline media metrics (GRP).

<sup>12</sup> Buzzmetrics, social media reports, brand research studies

<sup>13</sup> See Attachment #9 - The Dashboard

<sup>14</sup> Source: HP Dashboard – to Jan. 26th, 2008

But we cannot speak of increased printing without a specific mention to the Gwen paper dolls phenomenon. Through this easy, customizable and absolutely unique project, HP created an excitement for printing that is now spreading to the world in 50 different languages. It generated over 7 million customer interactions, and did not slow down in the absence of TV support<sup>15</sup>. When we launched the “Create a doll” banner for the September Yahoo! roadblock it achieved record results, with the highest click-through rate of the past 5 years for the entire technology category<sup>16</sup>.

**Result 2: Expanding perceptions of HP from a printer to a printing brand:** Although attitudes and brand attributes are slow to shift, we have already been able to register shifts by measuring the impact of a roadblock campaign on Yahoo! Homepage. AdIndex Advertising Effectiveness research (Dynamic Logic) showed how a people who had been exposed to the campaign vs. those who hadn’t registered a significant upswing in “*HP helps me with my printing needs*” and “*HP offers innovative printing features*.”<sup>17</sup>

Before the campaign we saw a significant growth in awareness of competitive brands, with HP losing its historic dominant top-of-mind. Since the launch of “*What do you have to say?*”, the gap has widened again to an 11% lead for HP **above** the nearest competitor<sup>18</sup>.

**Result 3: Creating excitement and interest around printing:** Printing became a renewed subject of conversation. Overall comments on the campaign have been 95.9% positive in the media and 63% positive and 35% neutral in blogs<sup>19</sup>. Buzzmetrics also shows positive reflection of the HP - Gwen Stefani connection through the campaign.

**Conclusion:** The “*What do you have to say?*” campaign could not have happened without the incremental learning gleaned through the various waves of research. At each stage of its development research brought fundamental revelations, enriching and giving more depth to previous discoveries, with different methodologies building cumulative knowledge and shining new light on our customer understanding – including when this meant considering a baby version of the Gwen dolls collection.

Research not only pointed us to solutions, it ensured we did not lose all the momentum needed for such a bold and visionary shift.

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<sup>15</sup> See attachment #8 - Dolls downloads

<sup>16</sup> See attachment #8 - Yahoo! roadblock record results

<sup>17</sup> See attachment#7 - Dynamic Logic

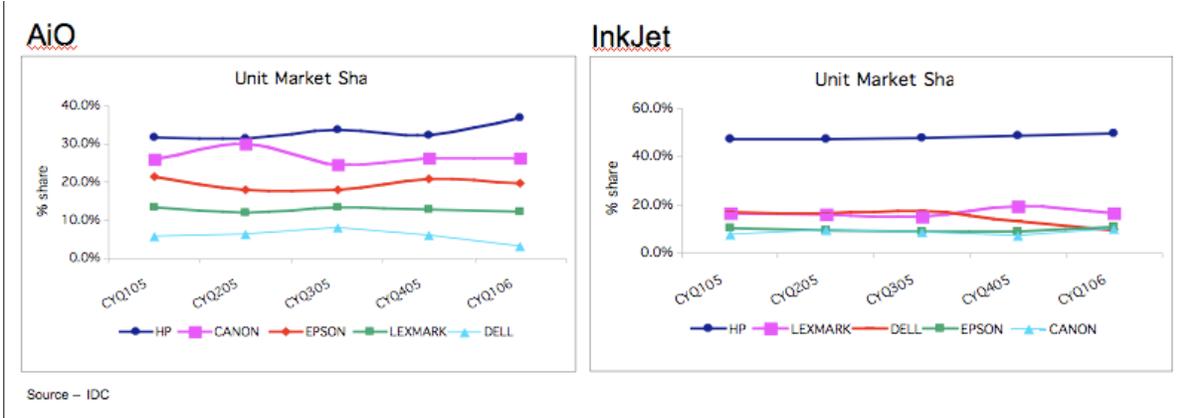
<sup>18</sup> See attachment #10 - Millward Brown Tracking Study

<sup>19</sup> Source: Porter Novelli

Attachments

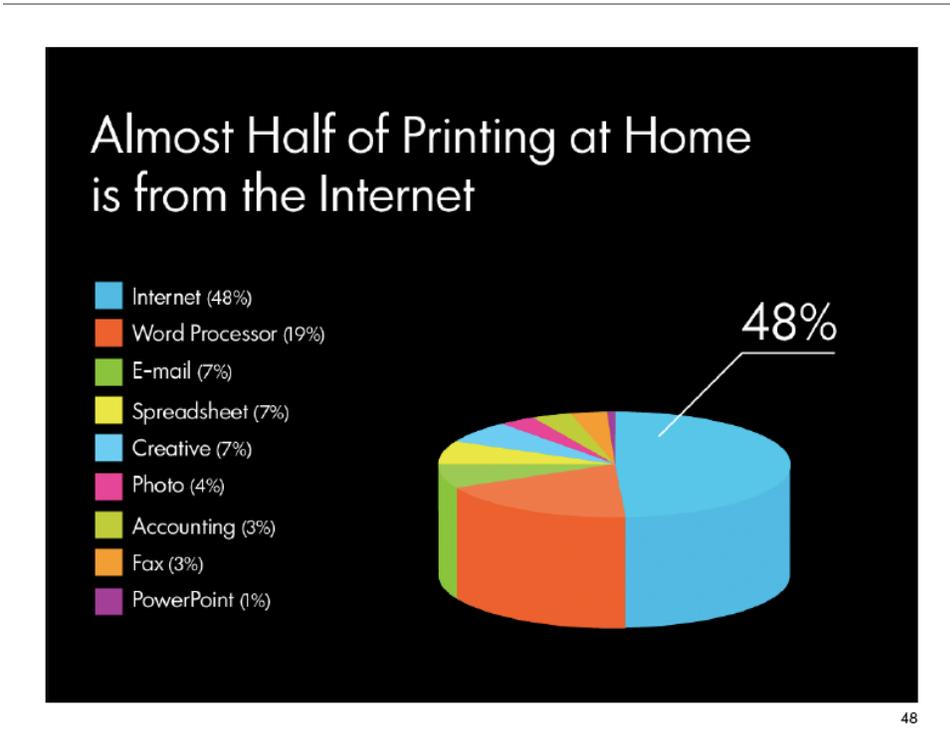
1. MARKET SHARE TRENDS

HP's healthy market share in both All-in-Ones and Inkjet printers.



2. PRINTING FROM THE INTERNET

Home printing is from the Internet.



3. ETHNOGRAPHIC RESEARCH REFERENCES  
Printing as an expression of the powerful need to connect.



Amber  
Time-Starved Mom



Darlene  
The Organizer



Amy  
Pragmatic Mom



Natalie  
Craftsy Mom



Shannon  
Old-School Mom



Suze  
Overly Involved Mom



Diane  
Well-Balanced Mom



Darcy & Kelly  
Confident Moms



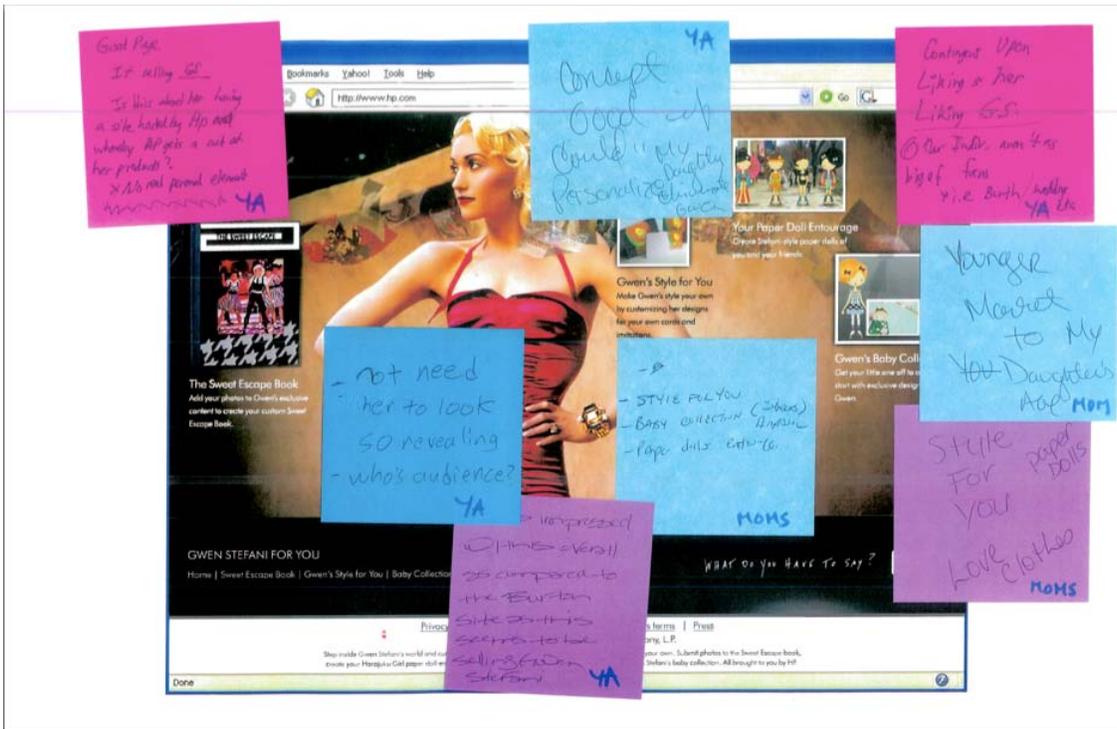
Monica  
Digital Mom



Alison  
Uber-Scranbooker

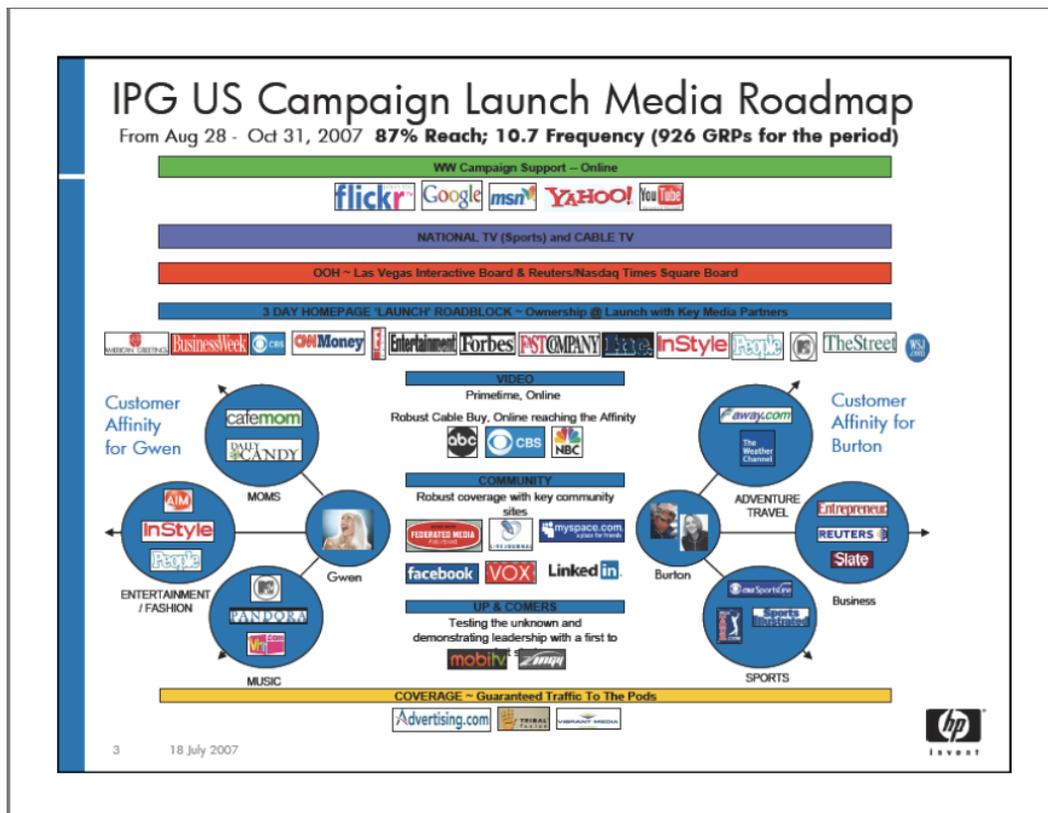


4. ILLUSTRATION FROM CREATIVE WORKSHOP  
 Consumers' suggestions contributed to fine-tuning the creative.



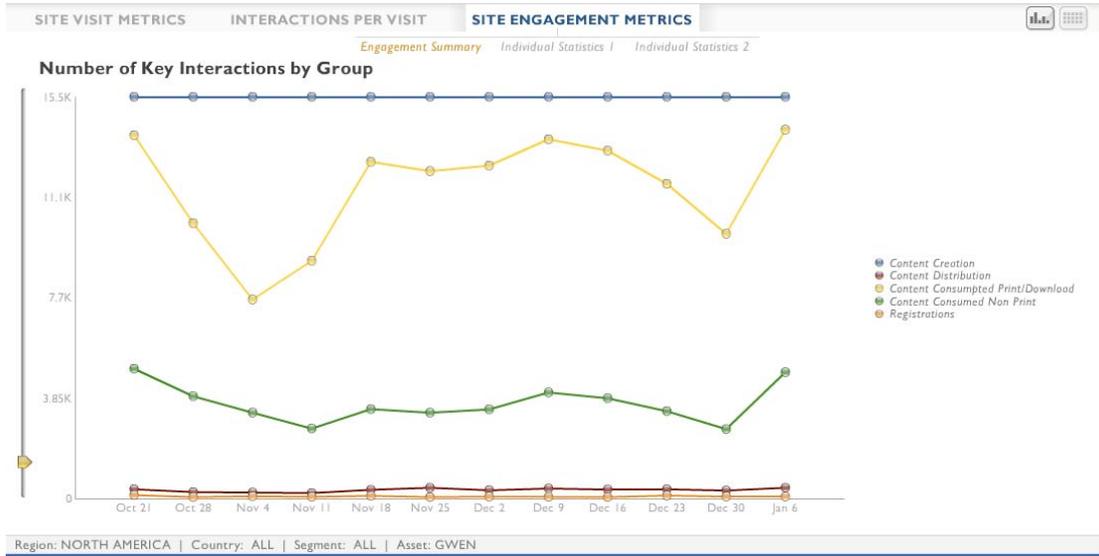
5. CAMPAIGN LAUNCH MEDIA PLAN

A media plan based on customer affinities and with the Internet at its core.



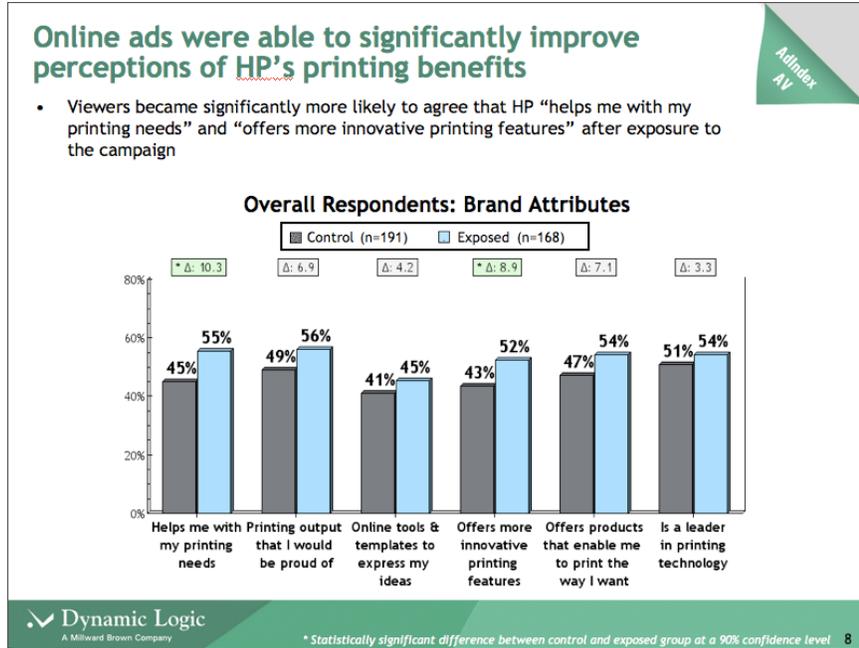
## 6. DOWNLOADS TO PRINT

The HP Dashboard monitors printing project downloads on the Gwen site, with the yellow line identifying content downloaded for printing.



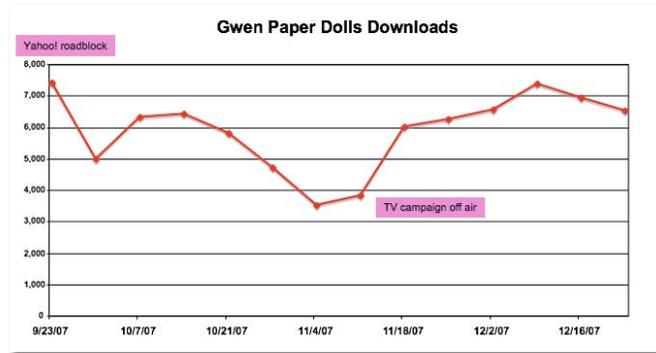
## 7. DYNAMIC LOGIC STUDY

Exposure to the campaign significantly increased perceptions that HP “helps me with my printing needs” and “offers innovative printing features.”

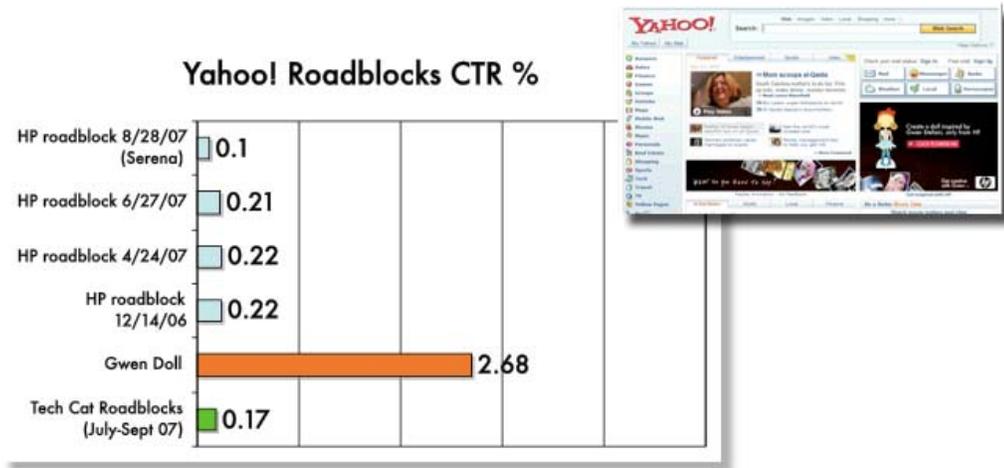


## 8. THE GWEN PAPER DOLLS PHENOMENON

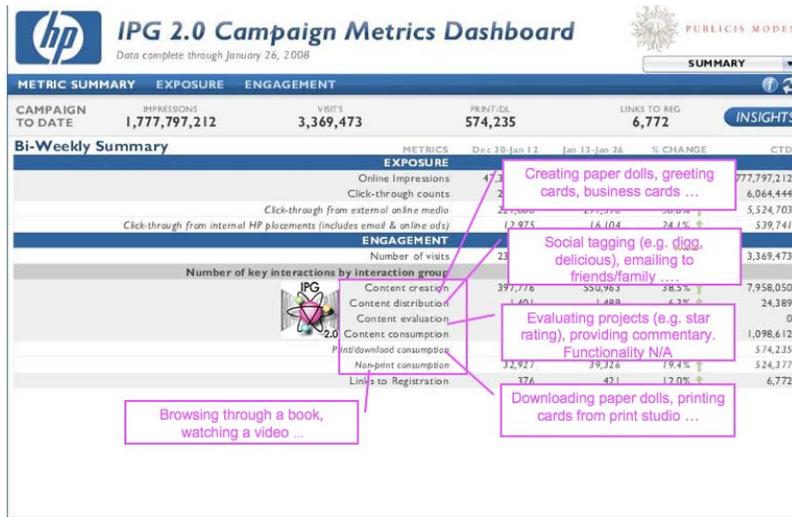
Gwen dolls phenomenon keeps growing, even without TV support.  
 Gwen Yahoo! roadblock outperformed all categories and segments.



Source: HP

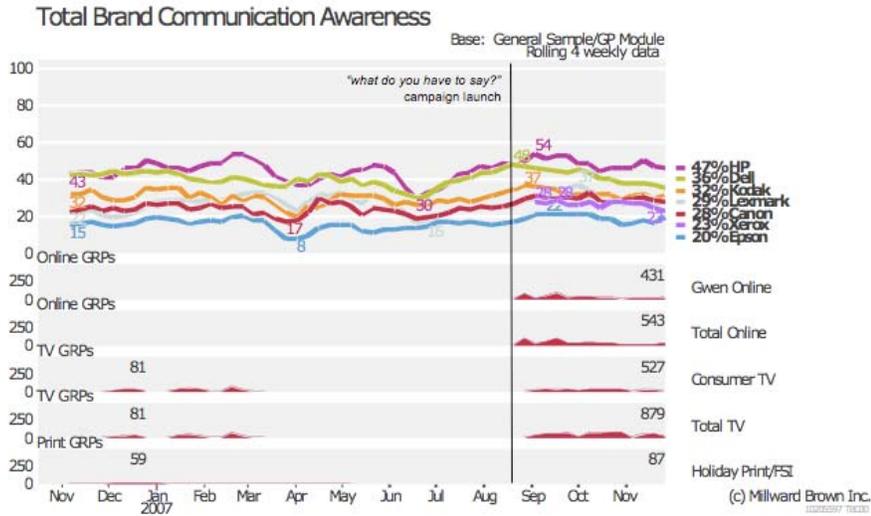


9. HP IPG DASHBOARD



10. MILLWARD BROWN TRACKING STUDY

Since the launch of the "What do you have to say?" campaign HP reopened the gap with its nearest competitor.



**(Q.TCBA1: Have you seen, read or heard anything about these specific brands of printers/printing recently?)**