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HP IPS BCO EUROPE

BUSINESS CUSTOMER REPORT – RUSSIAN FEDERATION

DECEMBER 2000



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TERMINOLOGY

VOLUME is a count of the total number of items, issues or messages. The number of mentions is distinct from the number of items, in that there can be more than one mention of issues (eg products) in one article, programme or other item.

IMPRESSIONS are the aggregate circulation figures of publications in which items appeared.

RATING is applied to each article on a scale that runs from 0 to 100. Each item starts with a neutral rating of 50, and is raised (more positive) or lowered (more negative) based on a number of characteristics of the item. These include placement, prominence, visuals, the strength and presence of messages for and against the organisations tracked, sources, content and tone.

This media analysis report focuses exclusively on the activities of the Business Customer Organisation (BCO) of HP and competitor equivalents.

The monthly report highlights HP's performance against principal competitors in the laser printing, digital send and capture, LFP, and networking printing solutions markets.

BACKGROUND & METHODOLOGY

Analysis Focus: HP IPS Europe Business Customer Organisation.

Product Categories: Mono Printing, Colour Printing, DesignJets and Emerging Products.

Competitors: Brother, Canon, Encad, Epson, Kodak, Konica, Kyocera, Lexmark, Océ, Oki, Ricoh and Xerox.

Clippings: Focused reading list, defined by HP and sourced through press cutting agency Press Select.

Issues and messages: provided and regularly updated by HP.

Echo has been tracking the level of media coverage, its quality and the major themes since FY1993. The study has been benchmarking HP against seven competitors since 1994 and against 22 competitors since FY1999. Competitors are benchmarked for those product categories relevant to HP.

The analysis contains all articles received in the report month, which include journals published ahead of the printed date of publication, as well as articles received late.

It is possible that not all articles mentioning HP and its competitors during the review period have been provided for this analysis, but it is our view that this report is a valid assessment of media interests and impact during the relevant period.



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Key HP IPS BCO Results - Russia - December 2000

HP & Competitors

	Volume	Impressions (‘000)	Rating	Reviews
HP	6	104.0	51.7	2
Brother	2	52.0	55	2
Canon	2	52.0	52.5	1
Encad	0	-	-	-
Epson	1	10.0	65	1
Kodak	0	-	-	-
Konica	0	-	-	-
Kyocera	1	52.0	55	1
Lexmark	2	92.0	52.5	1
Océ	0	-	-	-
Oki	3	52.0	51.7	1
Ricoh	0	-	-	-
Xerox	8	112.0	55.6	4

Table 1

December 2000

KEY BCO EVENTS

- HP expands LFP range with DesignJet 500 / 800 / 5000 models
- HP launches LaserJet 4550
- Xerox and Oki expand their colour laser ranges with new models



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Key HP IPS BCO Results - Mono Printing

HP & Competitors

	Volume	Impressions ('000)	Rating	Reviews
HP	1	52.0	55.0	1
Brother	2	52.0	55.0	2
Canon	1	52.0	55.0	1
Epson	0	-	-	-
Konica	0	-	-	-
Kyocera	1	52.0	55.0	1
Lexmark	2	92.0	52.5	1
Oki	1	52.0	55.0	1
Ricoh	0	-	-	-
Xerox	3	92.0	55.0	2

Table 2

December 2000

Key HP IPS BCO Results - Colour Printing

HP & Competitors

	Volume	Impressions ('000)	Rating	Reviews
HP	4	92.0	52.5	2
Brother	0	-	-	-
Canon	2	52.0	52.5	1
Epson	1	10.0	65.0	1
Konica	0	-	0.0	-
Kyocera	0	-	-	-
Lexmark	1	40.0	50.0	-
Oki	2	-	50.0	-
Ricoh	0	-	-	-
Xerox	5	20.0	56.0	2

Table 3

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Key HP IPS BCO Results - LFP

HP & Competitors

	Volume	Impressions (^{'000})	Rating	Reviews
HP	1	12	50	-
Canon	0	-	-	-
Encad	0	-	-	-
Epson	1	10	65	1
Kodak	0	-	-	-
Océ	0	-	-	-
Xerox	0	-	-	-

Table 4

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Key HP IPS BCO Results - Emerging Products

HP & Competitors

	Volume	Impressions (^{'000})	Rating	Reviews
HP	1	-	50	-
Kyocera	0	-	-	-
Lexmark	0	-	-	-
Ricoh	0	-	-	-
Xerox	0	-	-	-

Table 5

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GENERAL BCO SUMMARY

- Xerox edged ahead of HP by eight items to six.
- Epson claimed the rating lead with 65 from one mention. HP and Oki trailed the field on 51.7 each.
- HP was the only vendor to harvest more than 100,000 impressions; Lexmark was in second place on 92,000.
- Xerox led review totals with four.

PRODUCT CATEGORY SUMMARY

- In mono printing, Xerox outpaced HP on both measures thanks to its DocuPrint models in review coverage. HP continued to rely on the LaserJet 1100 for profile.
- Xerox led the colour printer coverage on both measures with the launch of new Phaser models. HP's Color LaserJet 4550 also featured in announcement coverage.
- Epson enjoyed the better of limited LFP coverage with the announcement of the Stylus Pro 7500 and new LFP media. HP's DesignJet 500 / 800 were described as a new platform for architects, engineers, projectionist and constructors.
- No emerging products featured in December coverage.

OUTLOOK & RECOMMENDATIONS

- In colour printing, HP needs to counter the threat of Oki's C7000 colour LED printer and new Xerox Phaser models.
- HP is challenged to move coverage beyond the LaserJet 1100 and to counter the strength of Xerox for 'performance and speed'.

*Product categories are now as follows: **Mono Printing** includes all personal and mid-range b/w laser printers. **Colour Printing** includes all colour laser printers and business inkjets. **LFP** includes all large format printers and LFP media. **Emerging Products** includes all high-end and commercial multifunction laser printers, network printing solutions and digital senders.*



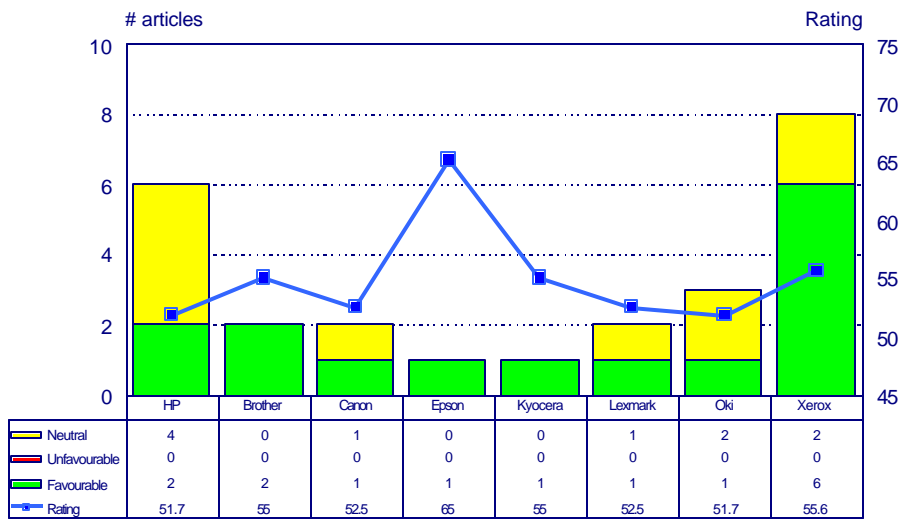
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HP IPS BCO - Share of Voice

By Volume, Favourability & Rating - HP & Competitors



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Chart 1

HP IPS BCO – Competitive Comparison

- **Xerox** was focused mainly on the colour and mono printing markets and edged ahead of **HP** with eight items to the latter's six.
- **Epson** reached a 65 rating from a review of the LFP Stylus Pro 7500 printer.
- HP's coverage was strongest in colour printing where the new Color LaserJet 4550 was reckoned to be "faster and have better memory" (PC Week, 4/12) than earlier models.
- Xerox harvested benchmark review coverage for its DocuPrint mono printers and technical profile coverage of new Phaser colour printers.
- **Brother** was focused on the mono printing market where its HL-1240 was praised for "high performance and print quality" (Computer Press, 12/00).
- **Oki** joined HP and Xerox in launching new colour printers, with its own C7000 model.
- Leading HP BCO publications: PC Week (2 / 52.5).



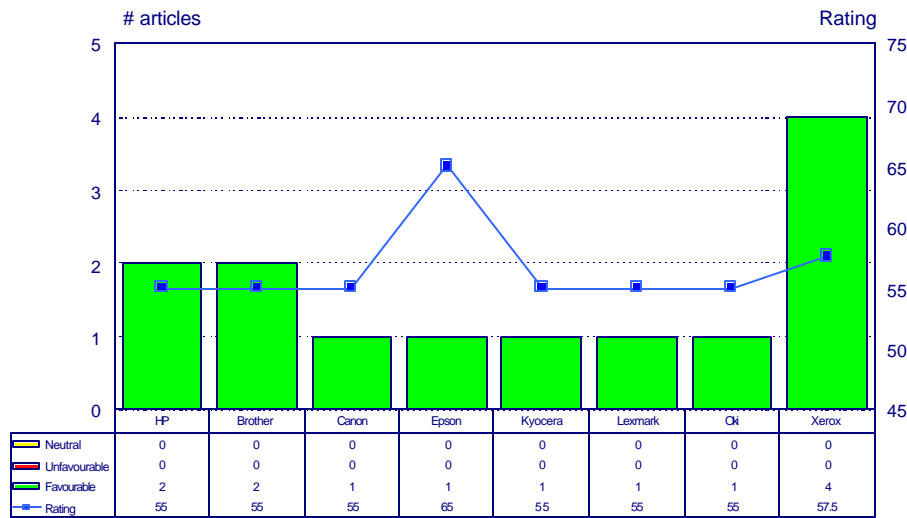
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HP IPS BCO - Reviews (Individual & Benchmark)

By Volume, Favourability & Rating - HP & Competitors



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Chart 2

HP IPS BCO Review Coverage – Competitive Comparison

- **Xerox** led review coverage on both measures thanks to its mono and colour printers. Mir PK (12/00) found the DocuPrint N2125 “fast” and the new Phaser 790 “an affordable printer with network solutions offering good quality A4 colour print for offices, small advertising agencies and design studios” (Publish, 12/00).
- **HP** and **Brother** shared second spot on two reviews.
- HP’s LaserJet 1100 continued to impress for “great performance” (Computer Press, 12/00).
- Brother’s HL-1240 was “recommendable for the SOHO market” (Computer Press, 12/00).
- **Epson** claimed top rating of 65 for its Stylus Pro 7500 for “photo quality print results in record speed” (Publish, 12/00).
- Leading HP review publication: Computer Press (2 / 55).



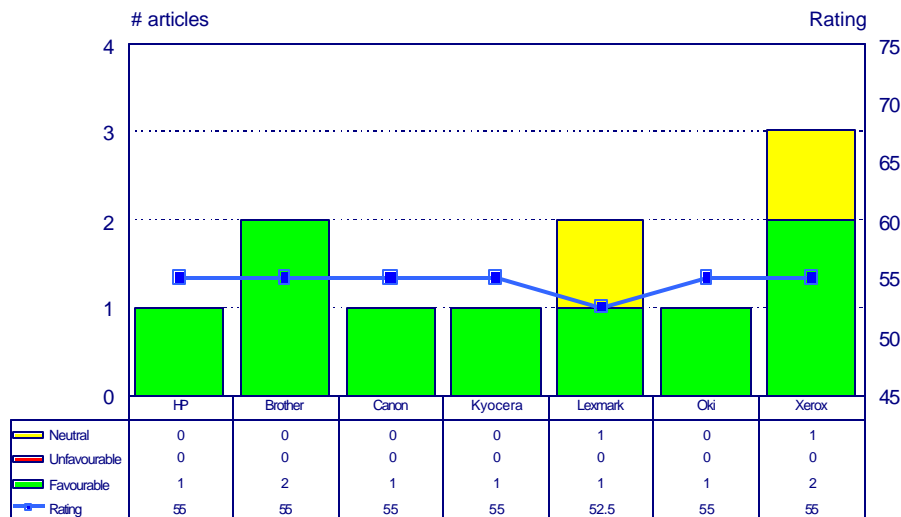
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HP IPS BCO - Mono Printing

By Volume, Favourability & Rating - HP & Competitors



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Chart 3

HP IPS BCO Mono printing – Competitive Comparison

- **Xerox** claimed the volume lead in mono printing coverage. Three different models in the DocuPrint range were reviewed. The DocuPrint N2825 was noted for two awards (see below).
- **HP's** LaserJet 1100 remained the mainstay of its limited coverage. Computer Press (12/00) lauded its "great performance".
- **Brother's** HL-1240 benefited from Mir PK's (12/00) verdict: "text print, speed."
- **Lexmark** ran the Optra W810 in benchmark review and emerged an award winner (see below).
- **Kyocera, Canon and Oki** featured in the same Computer Press benchmark review, but little difference in the assessment emerged.

Awards

HP LaserJet 1100 – 'Editors Choice' & 'Best Product of 2000' (Computer Press, 12/00)
 Brother HL-1240 – 'Price / performance' & 'Best Product of 2000' (Computer Press, 12/00) and DocuPrint N2125 'Best products from America in 2000' award (Mir PK, 12/00)
 Kyocera FS-680 -- 'Editors Choice' & 'Best Product of 2000' (Computer Press, 12/00)
 Oki Okipage 8w Lite – 'Good Buy' & 'Best Product of 2000' (Computer Press, 12/00)
 Canon LBP-800 - 'Price / performance' & 'Best Product of 2000' (Computer Press, 12/00)
 Lexmark Optra W810 - 'Best Product of 2000' (Computer Press, 12/00)
 Xerox DocuPrint N2825 & DocuPrint N4025 – 'Best buy' and 'Best products in 2000' awards (Computer Press, 12.00) & and DocuPrint N2125 'Best products from America in 2000' award (Mir PK, 12/00)

Leading HP mono printing publication: Computer Press (1 / 55).



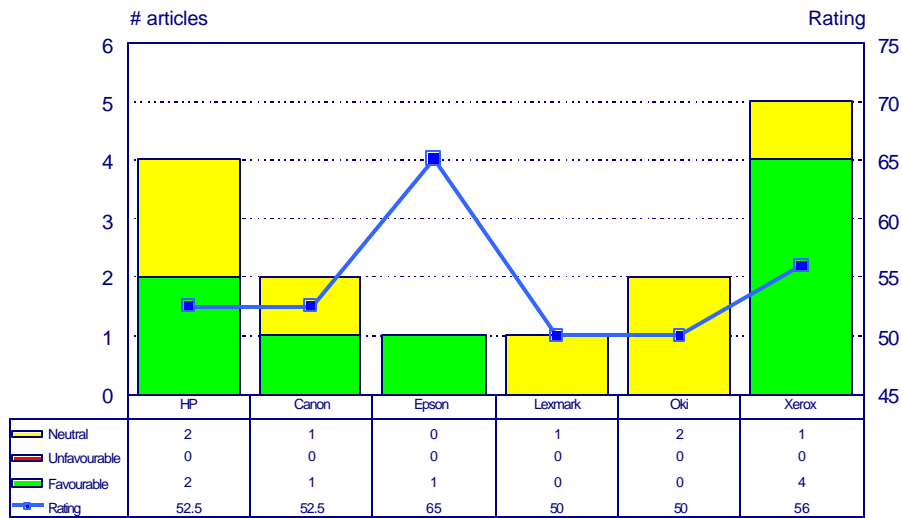
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HP IPS BCO - Colour Printing

By Volume, Favourability & Rating - HP & Competitors



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Chart 4

HP IPS BCO Colour printing – Competitive Comparison

- **Xerox** led the colour printer coverage with three new Phaser models, Phaser 750, 790 and 1230. The 1230 models showed that “Xerox has developed a new technology for colour printing. All the colours are released at the same time, which delivers excellent colour results” (PC Week, 19/12).
- **Epson** led the rating on 65 for a passing mention in the substantive LFP coverage.
- **HP** launched a “new laser printer Color LaserJet 4550. The new model is faster and has better memory” (PC Week, 4/12).
- **Oki** launched new series of its colour laser printer - C7000 (Enterprise Partner, 15/12).
- **Canon’s** colour printing coverage concentrated on its mobile BJC models.

Awards

HP DJ 350 Cbi – ‘Best products in 2000’ award (Computer Press, 12/00)
 Canon BJC 50 / 55 - ‘Best products in 2000’ award (Computer Press, 12/00)

- Leading HP colour printing publication: no single title.



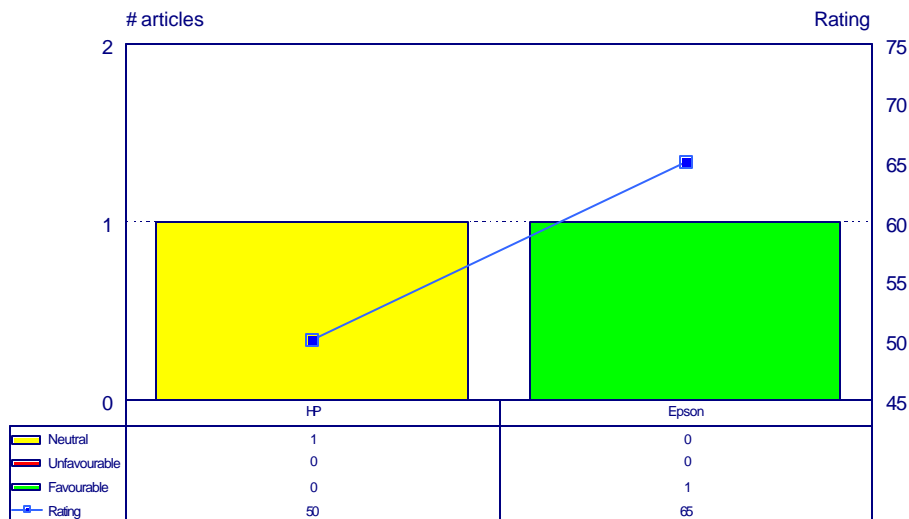
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HP IPS BCO - LFP

By Volume, Favourability & Rating - HP & Competitors



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Chart 5

HP IPS BCO LFP – Competitive Comparison

- **HP** and **Epson** shared limited LFP coverage. The latter's Stylus Pro 7500 professional LFP printer was praised for "photo quality print results in record speed. It is an ideal tool for photographers and print studios along with a new generation of media for its LFP printers. The lightfastness is more than 100 years. The media are called Premium Semigloss Photo Paper and Glossy Paper Photo Weight" (Publish, 12/00).
- HP's new DesignJet 500 / 800 were announced in Read Me (10/00) as offering "high photo quality and good colour print".
- Leading HP LFP publication: Read Me (1 / 50).



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Bylines and Media Summaries are attached to this document outlining the aggregate rating of each title / journalist. Full HP data on all issues analysed is attached. Further information on these and other matters in the report is available from Echo Research Ltd.

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