

TO: Clark Murray
FROM: Jeanne Bonhomme
SUBJECT: Virginia Slims Qualitative Imagery Research

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*Approved
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Five (5) focus groups, consisting entirely of women, were interviewed in Baltimore, MD on August 16th and 17th, 1993. Participants included Virginia Slims smokers, smokers of competitive 100's and 120's, and past participants in the V Wear Promotion. The objectives of this qualitative research were to increase understanding of Virginia Slims brand imagery versus that of competitive brands (mainly Eve, Misty, and Capri), to explore Virginia Slims advertising imagery versus that of competitive brands, and to provide input for Virginia Slims' future market planning.

Brand Purchase Decision Considerations:

Most pack and carton purchasers interviewed expressed strong loyalty to their regular brand. Alternate purchases usually were prompted either by POS merchandise offers or by coupon offers (direct mail or FSI). These alternate purchases tended to occur within a "consideration set," i.e. a group of brands felt to be similar to their own. Virginia Slims smokers were attracted to the brand by both its 100's length and by its "women's" image, which they often described as "confident and competent." Some had switched to Virginia Slims as they had "matured." This image was generally upheld by the competitive smokers, but this group, especially the younger adult smokers, tended to hold these sentiments in less esteem. In general, competitive smokers tended to feel that Virginia Slims and its "feminine" image do not fit with "how I see myself." Some preferred smoking a brand which is "equally acceptable" for women and men to smoking a "women's" brand. Many competitive smokers associated Virginia Slims with women older than themselves, and a sentiment not uncommon among younger adult competitive smokers ran along the lines of "My mother smokes that brand."

While competitive smokers recognized Virginia Slims as "an established brand," some, especially the younger adult competitive smokers, said that Virginia Slims seems "less popular" than their regular brand, which was often Marlboro Lights or Salem. These women suggested that few or none of their friends smoke Virginia Slims and that they do not notice POS materials for it.

Imagery Methodology:

Several methods were used to elicit response to Virginia Slims and competitive brand imagery. These were:

- "pack sort," in which women were asked to group brands to form a common theme;
- "photo sort," linking photographs of women with specific brand images;
- "celebrity list," linking famous personalities and images with each brand.

Virginia Slims Brand Imagery:

Virginia Slims and competitive brand smokers generally viewed Virginia Slims as "distinct" and "separate" from other "feminine" brands, such as Eve, Capri, and Misty. Virginia Slims was clearly recognized as a "brand for women," with an established and "credible" cigarette brand imagery.

During the "pack sort," Virginia Slims was immediately differentiated from these other brands in several ways. The Virginia Slims packaging was generally noted as including colors which are seen on other brands' packaging, lending credence to the image of the brand as a "real" cigarette that is aimed at women. Many also felt that the packaging

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is not "overly feminine" and has "more style" than those of Eve, Capri, and Misty, putting Virginia Slims "in a class by herself," "a step up" from other "feminine" brands. There were indications that Virginia Slims fell somewhere between Marlboro Lights and these "girly" brands on the image scale. Some younger adult competitive smokers linked the image of Virginia Slims with that of Benson & Hedges, representing a more "sophisticated style" that is suitable for women 35 and over.

Virginia Slims was viewed by many women as "the first" female brand, and regular smokers of the brand appear to have taken this image and "updated" it to their lifestyles. Among Virginia Slims smokers, the brand was seen as "standing for":

- Taking pride in what you do;
- Being equal with everyone else;
- Feminine, but not "silly" or "prissy";
- Confidence;
- A woman "in control" (of whatever situation she is in).

Younger adult Virginia Slims smokers tended to add a sense of "fun" and "sociability" to their image of the brand. These women often commented that, while "business-like" at work, they have a "fun side" that emerges on weekends. Older Virginia Slims smokers linked the brand with "the woman of the '90's," a multi-dimensional individual with a "range" of responsibilities and roles -- mother, businessperson, wife, etc. Some implied that the more "feminine" brands, such as Eve, were not suitable for this contemporary woman.

Competitive brand smokers also felt that Virginia Slims projects femininity, confidence, and class. Younger adult competitive smokers generally equated Virginia Slims with more serious, professional women, as did the older competitive smokers, many of whom felt that this image was for women older than them, i.e. 40 and over.

When asked to select photographs that seemed consistent with Virginia Slims' image, younger adult Virginia Slims smokers linked their brand to pictures of women in business suits, evening gowns, and casual attire, with the multiple themes of confident, educated, classy, sophisticated, and fun being mentioned. This group picked as relevant celebrities Goldie Hawn, Julia Roberts, Cindy Crawford, Michelle Pfeiffer, and Darryl Hannah. Younger adult competitive smokers also selected women in business suits, but they used adjectives like "serious" and "older" to describe the brand's smokers. These sentiments were echoed in their celebrity choices -- Joan Rivers, Candace Bergen, and Connie Chung, all of whom represent a middle-aged, stylish, professional ideal.

The older Virginia Slims smokers were more likely to select a range of women and adjectives to describe their brand, as they tended to feel that a woman has many facets to her lifestyle. Any woman with an "independent" style and a sense of "confidence" could be a smoker of Virginia Slims, in their estimation. Pictures selected by this group included women with an "individual style," business professionals, and women in non-traditional roles (a woman on a tractor being an example). Adjectives used included cool, confident, sexy, up-beat, and self-assured. Celebrities associated with Virginia Slims were an interesting mix of younger adults and older adults, including Goldie Hawn, Dolly Parton, Cher, Sharon Stone, and Madonna. Older competitive smokers, like their younger adult counterparts, ascribed a more serious image to Virginia Slims, and selected photos of business professionals. Some, however, associated a certain elegance and with the brand, and selected pictures featuring glamorous women. While this group shared the feeling that Virginia Slims projects confidence, they also generally felt that it is more for straightforward women, whereas regular smokers of the brand described a more casual, fun image. Celebrities selected by these older competitive smokers included Mary Tyler Moore, Oprah Winfrey, and Angela Lansbury, all businesslike, confident, and older than the respondents themselves.

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Brand Imagery Associated with Eve, Capri, and Misty:

These brands were usually seen as "three peas in a pod," and during the pack sort they were often placed together in a set, differentiated from other brands. Imagery for one of these brands was often considered to be appropriate for all. Respondents felt that these brands were "newer" brands, and pack designs with pastel colors and "flowery" designs generally elicited terms like "prissy" and "overly feminine." Some knew of Misty's lower price and had smoked this brand, and still grouped it with Eve and Capri, clearly differentiating it from Virginia Slims. In general, these brands were felt to project an "soft" image lacking in the confidence associated with Virginia Slims, one which was seen as "too feminine," "gossipy," and for "closet smokers." Pictures selected as indicative of these brands included those of younger adult women who had a "faddish" look and images of older women in evening gowns, who projected glamour and not necessarily class. Celebrities who were associated with Eve, Misty, and Capri included Kim Basinger, Julia Roberts, Tori Spelling, and Elizabeth Taylor, all either "cutesy," "snobbish," or glamorous. As a point of reference, respondents were also asked to identify Marlboro Lights imagery with respect to women. This evoked images of women "hard at work," i.e. outdoorsy, active, and somewhat "rugged," and younger adult women, seen as down to earth, having fun, and confident.

Advertising Imagery:

Women in each group were shown a series of ads for Virginia Slims and competitive brands in which the brand name/pack had been removed. The Virginia Slims ads on an unbranded basis were felt to portray a range of women -- elegant women in evening gowns, who projected confidence and sophistication, casually dressed women who were unique and independent, women fishing and on motorcycles (both current campaigns), active, stylish, and outdoorsy, and three women together (current campaign) who were noted as "easygoing" and having fun. Some respondents recognized these ads as those for the brand. When the brand name was identified, Virginia Slims smokers quickly confirmed that a strong fit exists between the advertising messages/images and their perceptions of the brand. Younger adult women, both Virginia Slims smokers and competitive smokers could easily relate the current campaign to their own lifestyles and self-image. Several stated that the current ads are more down to earth than were previous ads, and were also seen as more versatile and multi-dimensional. The women featured in these ads were felt to credibly portray real Virginia Slims smokers. In addition, the copy was seen by many as reinforcing the sense of "independence" of today's women.

Unbranded display of Capri advertising evoked the terms "elegant," "sophisticated," and "confident," but when the brand name was displayed, prior images emerged. The perception of independence and class was notably lessened. Unbranded Misty ads were either seen to be "carefree," "casual," and "fun," or "outdated" and irrelevant. When the brand was revealed, as with Capri, prior perceptions returned, and respondents saw the imagery as "phony" and for "women who smoke for show." Style ads elicited similarly mixed reviews, and were often seen to be "fake" and/or "overly feminine."

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