

50754 3286

PROJECT QC

MACRO ASSESSORSM
TOTAL PROPOSITION TEST

JANUARY 1991

PHOTOCOPY

BACKGROUND

VANTAGE Excel was developed in response to smokers' ^{a perceived want} desire for a product which provides consumer and social benefits of

- Good taste
- Low sidestream smoke

Four product styles were evaluated:

- Non-menthol FFLT 85mm & 100mm
- Menthol FFLT 85mm & 100mm

RESEARCH OBJECTIVES

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- Diagnostically assess the appeal and acceptance of the low sidestream smoke concept
 - Advertising
 - Product
 - Consumer adoption

- Provide a share projection range for VANTAGE Excel's selling rate at the 4-6 month period following DTS

- Project VANTAGE Excel's in-market sources of business from:
 - Competition
 - Cannibalization (VANTAGE and RJR)
 - Demographic/category usage

METHODOLOGY

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- Evaluation conducted in eight geographically dispersed markets
- Consumer sample included non-menthol and menthol filter cigarette smokers: males/females, 85mm/100mm+, FF/FFLT/ULT

- Total	849
- VANTAGE (boosted)	210
- Competitive (ex VANTAGE)	639
- Total proposition test incorporating
 - Advertising exposure in competitive clutter
 - Purchase opportunity in lab store
 - Product placement
 - Repurchase opportunities

ACTION TO BE TAKEN

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Results of this research will be used:

- As input for making a 2nd QTR '91 launch decision
- For refining VANTAGE Excel's marketing elements
- For deciding the next course of action for VANTAGE Excel

SUMMARY OF KEY FINDINGS

- The VANTAGE Excel proposition generated trial comparable to the "average" level for line extensions previously evaluated but significantly lower than VANTAGE Excel achieved in an early 1989 evaluation (VRP)
 - Fall-off in trial results from reduced interest among non-VANTAGE smokers
 - Proposition was perceived as less important, less different, less likeable, and less believable
 - Changes in the marketplace (restrictions on smoking in public places and/or the introduction of other "low smoke" products) appear to have reduced interest in the proposition

- Initial repeat purchase among triers was at the lower end of the range for previously tested line extensions but significantly higher than the level obtained by VRP
 - While product performance was improved vs. VRP, taste was the primary reason for non-repeat
 - Reactions to smoke reduction were favorable and there did not appear to be a top-of-mind ash problem (QC performed significantly better than VRP on ash issue)

- Projected long term retention for VANTAGE Excel QC is low but somewhat higher than achieved by VRP in early 1989 further supporting a somewhat improved product

SUMMARY OF KEY FINDINGS

- VANTAGE Excel's (QC) sustaining Share of Market projection (4-6 months) is low overall for a four style introduction. The QC and VRP propositions generate comparable SOM potential
- Broader market audience (both non-menthol and menthol filter smokers) and somewhat higher retention for QC compensates for reduced trial appeal vs. VRP

	<u>BASELINE ESTIMATE</u>	
	<u>Total</u>	<u>Incremental to RJR</u>
VANTAGE Excel QC	0.37	0.16
VANTAGE Excel VRP	0.36	0.19
Line Extension Average	0.51	0.19+

PROPOSITION ACCEPTANCE

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- Advertising Performance

- Recall
- Communication

- Trial

- Trial rates
- Expectations leading to trial
- Sources of trial

ADVERTISING RECALL

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- Unaided recall for QC was comparable to VRP but relatively low versus line extensions previously tested

	<u>QC</u>	<u>AD RECALL</u>	<u>VRP</u>
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VANTAGE/VANTAGE Excel
VANTAGE Excel
 All other VANTAGE

54%	52%
24	29
30	23

SALEM/SALEM Excel
SALEM Excel
 All other SALEM

55%
36
19

Camel-any mention (ATF)
 Camel Special
 Camel Special or Camel

90%
13
84

Camel-any mention (FC)
 Camel Wides
 Camel Wides or Camel

89%
29
86

Camel BT
 More Lights
 Salem Slim Lights
 Winston Ultra Lights

86%
76%
74%
61%

ADVERTISING RECALL

- Recall of advertising for QC and VRP was very similar - higher recall among females, franchise, and lab triers

Recall of VANTAGE Excel or VANTAGE

$\frac{QC}{\%}$ $\frac{VRP}{\%}$

Total	54	52
Males	49	46
Females	59	58
18-24	55	47
25-34	52	56
35-49	58	58
50+	49	44
Franchise	88	89
Competitive	52	50
Lab Triers	84	72
Lab Non-Triers	47	43



ADVERTISING COMMUNICATION

- Excel's advertising communication focused on "less smoke" followed by playback of the social acceptability benefit
- More focus on "less smoke from lit end" and less mention of the "less offensive" benefit for QC vs. VRP advertising

	Total Ideas			
	Non-Menthol		Menthol	
	QC	VRP	QC	VRP
	%	%	%	%
<u>Less Smoke (NET)</u>	78	75	78	73
Less smoke in air	31	34	20	38
Less smoke from lit end	78 ←	36	78 ←	30
<u>Benefit (NET)</u>	53 →	64	42 →	61
Less offensive to others	27 →	46	18 →	44
Low tar/nicotine	18	14	13	14
<u>Taste/Flavor (NET)</u>	19	17	29 ←	22






ADVERTISING RATINGS

- QC Proposition is perceived as less important, less different, less believable, and less likeable. Changes in marketplace is hypothesized as diminishing the proposition's newsworthiness and impact

	<u>Non-Menthol</u> <u>QC</u> <u>VRP</u> %	<u>Menthol</u> <u>QC</u> <u>VRP</u> %
<u>Top Two Box</u>		
Importance	33 ➡ 43	33 ➡ 55
Difference	47 ➡ 67	48 ➡ 65
Believability	30 ➡ 35	33 ➡ 46
Likeability	34 ➡ 39	32 ➡ 53

ADVERTISING RATINGS

- The fall-off in perceptions of importance, difference, believability, and likeability for QC vs. VRP/SRP occurs among competitive consumers. Perceptions among franchise smokers hold up overall with an increase in believability.

	<u>Franchise</u> <u>QC VRP/SRP</u> %		<u>Competitive</u> <u>QC VRP/SRP</u> %
<u>Top Two Box</u>			
Importance	71	70	32  44
Difference	80	80	46  64
Believability	63  52	52	30  37
Likeability	76	73	32  40

TRIAL RATES

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- VANTAGE Excel (QC) generated trial comparable to the overall average for line extensions previously evaluated but significantly below the level achieved by VRP in early 1989. Changes in marketplace conditions appear to have reduced interest in the proposition.

	<u>Lab Trial</u> %
VANTAGE Excel - QC	19
SALEM Excel - SRP	41
VANTAGE Excel - VRP	31
Camel - ATF	20
SALEM Slim Lights	20
Camel - FC	18
Winston Ultra Lights	18
Camel - BT	17
VANTAGE - VLN	15
More Lights	11
Average for Line Extensions	21

NOTE: Trial rate for SALEM Excel (SRP) is among menthol smokers and trial rate for VANTAGE Excel (VRP) is among non-menthol smokers

TRIAL RATES

- Purchase in the lab store was significantly lower for VANTAGE Excel QC as a result of lower trial among competitive smokers

	<u>Lab Trial</u>	<u>VANTAGE</u>	<u>VANTAGE</u>
	<u>Excel-QC</u>	<u>Excel-VRP</u>	<u>Excel-VRP</u>
	%	%	%
Total	12	↑	31
● Franchise	80		74
● Competitive	17	↑	29
● Non-Menthol	20	↑	31
● Menthol	16		NA

SOURCE OF TRIAL

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- Stronger trial interest among females, 35-49 years old, college educated, and mid to higher income smokers

Source of Trial Among Competitive Smokers Profile Index %

Males	39	76
Females	61	125
18-24	12	92
25-34	19	64
35-49	41	126
50+	28	112
College	44	119
Non-College	56	89
< \$15,000	15	60
\$15,000 - \$25,000	28	109
\$25,000+	57	115

SOURCE OF TRIAL

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- From usage perspective, higher trial interest among 100mm+ and Ultra Low Tar smokers

Source of Trial Among Competitive Smokers

Profile Index
%

85mm	44	77
100mm+	56	130
FF	33	70
FFLT	47	116
ULT	20	163
Menthol	27	93
Non-Menthol	73	102
RJR	31	111
PM	39	88
Other	30	109
High Emphasis Markets	47	115
Low Emphasis Markets	53	89

PERCEPTUAL PRODUCT DIMENSIONS

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Good Taste

Right amount of tobacco taste
Satisfying cigarette
Natural tobacco taste
High quality cigarette
Does not leave mouth dry
Smooth
Fresh aftertaste
Not harsh
Slow burn rate

Smooth/Mild

Mild
Low tar & nicotine
Not harsh
Smooth
[Not] strong tasting

In-Crowd Brand

Adult smokers 25 years or more
18-24 year old smokers
Men
Modern, contemporary person
My friends would smoke
Person who makes own decisions
Concerned about impression they make
Women
Smokers who care about others
Could be popular in 90's

Different

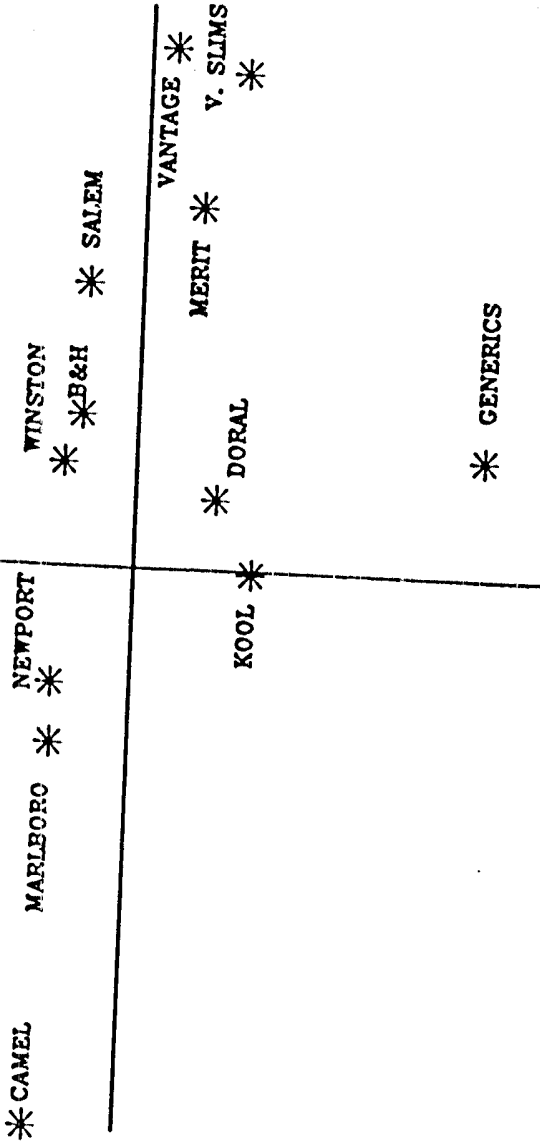
Gimmicky
Different and unique
Smokers who care about others
Concerned about impression they make
Slow burn rate

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COMPETITIVE MARKET

GOOD TASTE

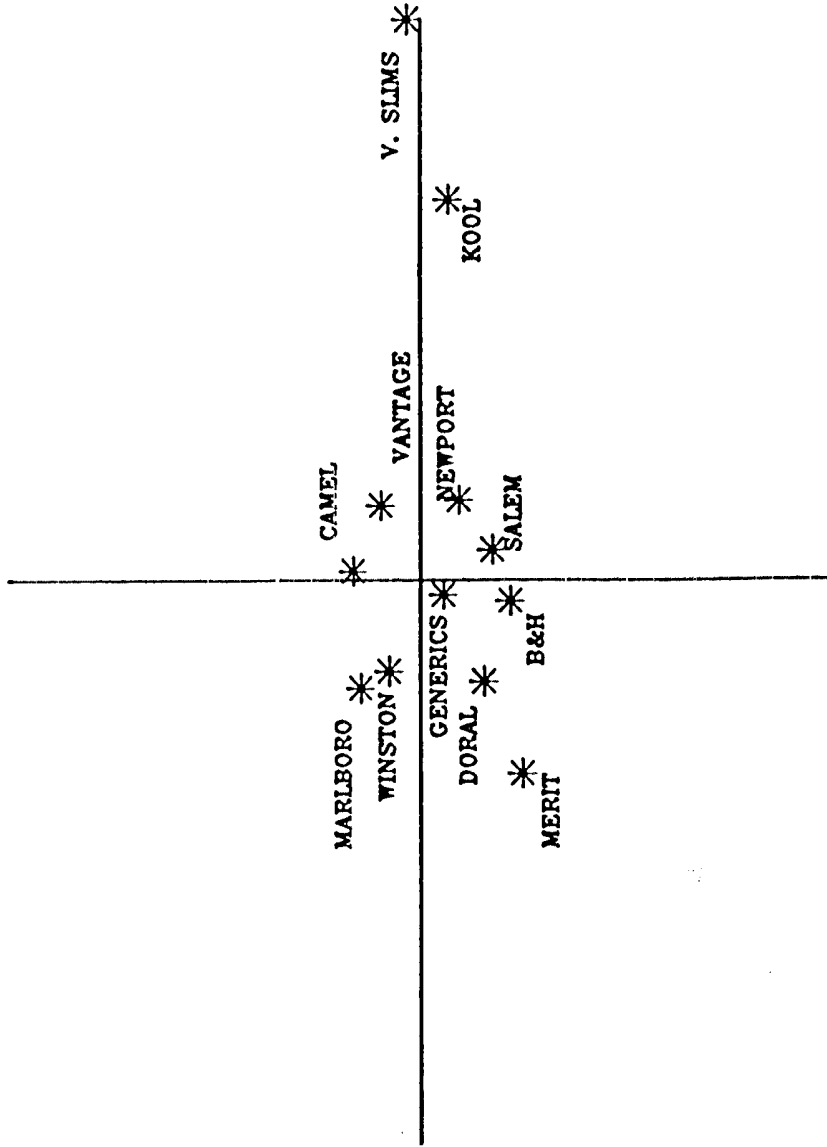
S M O O T H / M I L D



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COMPETITIVE MARKET

"IN - CROWD"



D I F F E R E N T

PRE-TRIAL EXPECTATIONS

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- Franchise smokers have stronger pre-trial expectations for VANTAGE Excel than competitive brand users; franchise users expect the product to be:
 - Better tasting
 - Somewhat smoother/milder
 - Somewhat more of an in-crowd product
 - More different

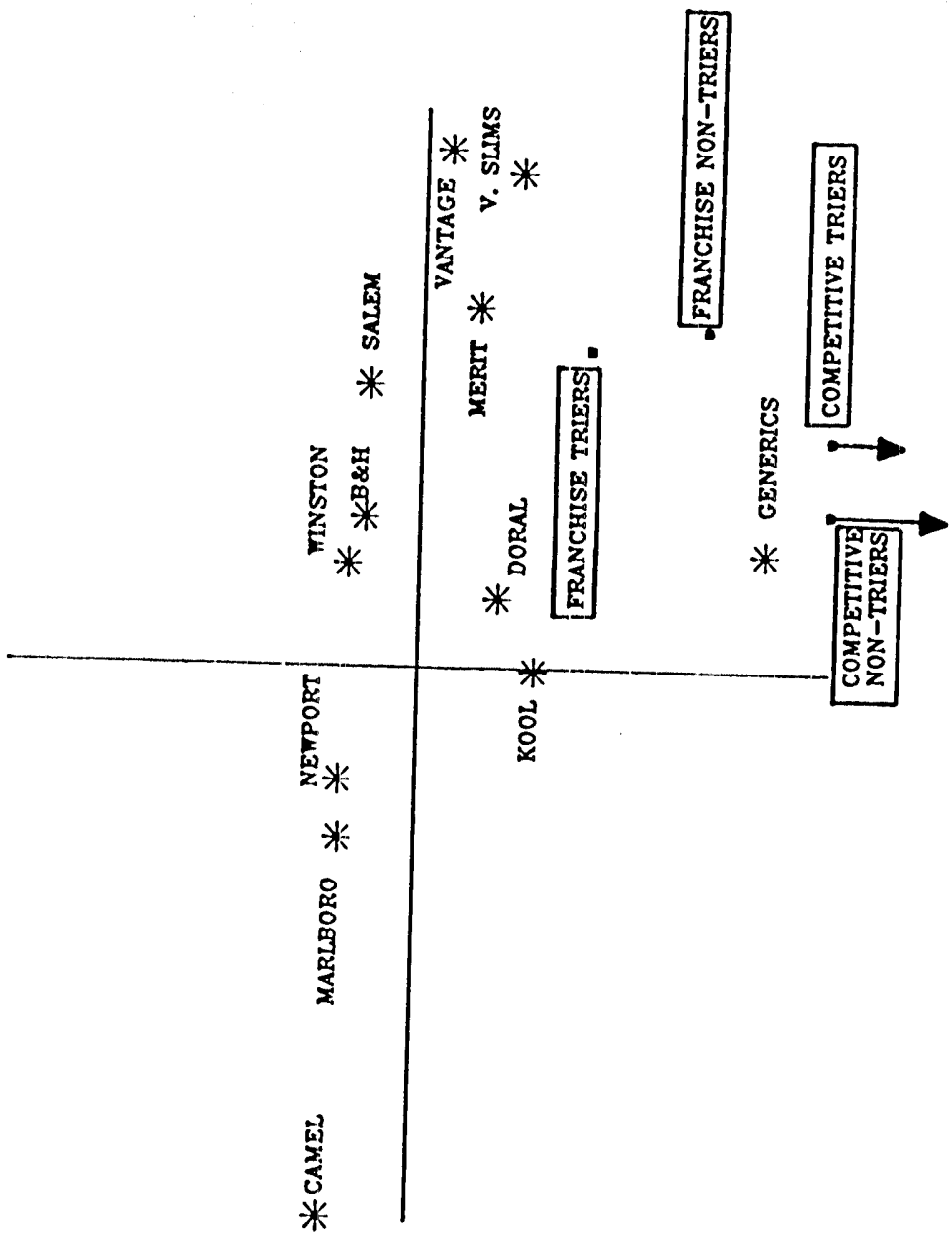
- More positive taste expectations and perceived difference appeared to be the primary motivators of trial among both franchise and competitive smokers

- While purchasers of VANTAGE Excel had more positive taste expectations relative to non-purchasers, there was significant skepticism on the taste issue among purchasers prior to use

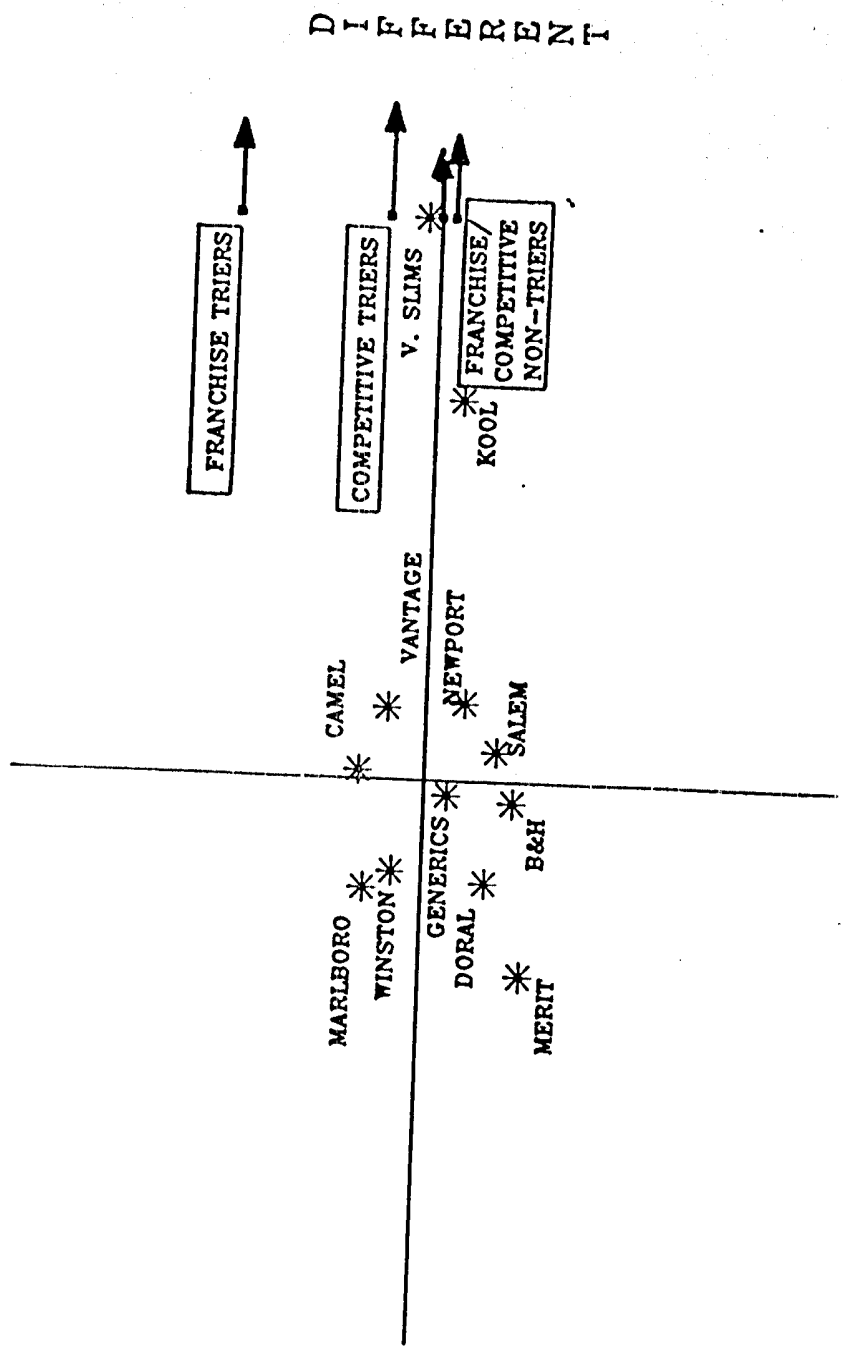
PRE-TRIAL PERCEPTIONS OF VANTAGE EXCEL:
TRIERS VS. NON-TRIERS

GOOD TASTE

S M O O T H / M I L D



PRE-TRIAL PERCEPTIONS OF VANTAGE EXCEL:
TRIERS VS. NON-TRIERS
"IN - CROWD"



SUMMARY - ADVERTISING & TRIAL

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- The current advertising generates recall comparable to levels achieved previously in the VRP evaluation. Overall, recall for VANTAGE Excel falls below levels achieved on other line extension propositions.
- Advertising communication focuses on the issue of reduced smoke. However, consumers perceive the proposition to be less important, less different, less believable, and less likeable than when evaluated in early 1989. Changes in the marketplace may have impacted the newsworthiness and desire for this type of product
- VANTAGE Excel generated substantially lower trial relative to the VRP proposition evaluated in early 1989 (19% vs. 31% trial rate in laboratory store). The fall-off in trial resulted from lower interest among competitive smokers.
- Trial appeal was highest among:
 - Franchise smokers
 - Females
 - Older smokers (35+)
 - Mid to high income (\$15m+)
 - College educated
 - 100mm+ and Low Tar users
- More positive taste and difference expectations were primary motivators of trial. Significant taste skepticism even among consumers motivated to purchase

PRODUCT ACCEPTANCE

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- Post-use evaluation
- Initial repeat purchase
- Long term retention

POST-USE EVALUATION: PRODUCT ACCEPTANCE

- Overall ratings for VANTAGE Excel QC were stronger among triers than previously tested products
- Likes focused on "reduced smoke"; dislikes related to keeping the cigarette lit and taste

	<u>Non-Menthol Triers</u>		<u>Menthol Triers</u>	
	<u>QC</u>	<u>VRP</u>	<u>QC</u>	<u>VRP</u>
	(153)	(199)	(30)	(150)
	%	%	%	%
Thermometer 70% +	37	29	56	43
<u>Likes</u>				
Less smoke/didn't smoke up house	37	45	39	35
No/less smoke from lit end	21	17	16	14
Light/mild/not as strong	13	9	14	11
Taste/good taste	11	14	9	10
<u>Dislikes</u>				
Doesn't stay lit	12	8	17	1
Harsh not smooth	11	14	8	7
Mild/too light	9	9	5	6
Nothing	19	5	38	14

POST-USE EVALUATION: ASH AND TASTE ISSUE

- QC product exhibited improvement versus VRP/SRP on ash flaking and notice of unusual taste

	<u>Non-Menthol Triers</u>		<u>Menthol Triers</u>	
	$\frac{QC}{(153)}$ %	$\frac{VRP}{(199)}$ %	$\frac{QC}{(30)}$ %	$\frac{SRP}{(150)}$ %
<u>Notice Ashes</u>				
Yes	39	64	53	67
No	61	36	47	32
			↑	↓
<u>Notice Unusual Taste</u>				
Yes	35	55	33	57
No	65	45	67	43
			↑	↓

POST-USE EVALUATION: LIKEABILITY VS. USUAL BRAND

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- The QC non-menthol product achieved stronger acceptance relative to smokers usual brand than the VRP non-menthol product. Acceptance for QC menthol among consumers motivated to try is comparable to acceptance for the SRP menthol product.

	<u>Non-Menthol Triers</u> $\frac{\text{QC}}{(153)}\%$	$\frac{\text{VRP}}{(199)}\%$	<u>Menthol Triers</u> $\frac{\text{QC}}{(30)}\%$	$\frac{\text{SRP}}{(150)}\%$
More than usual brand	9 ←	4	6	5
Same as usual brand	11 ←	6	18	14
Less than usual brand	80 →	90	76	81

Likeability vs. Usual Brand

More than usual brand

Same as usual brand

Less than usual brand

POST-USE EVALUATION: VERSUS USUAL BRAND/EXPECTATIONS

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- The QC non-menthol product achieved more positive taste ratings vs. both usual brand and expectations relative to the VRP product. Negative aftertaste perceptions relative to usual brand increased.
- The QC menthol product was comparable to SRP versus usual brand and expectations with improvement in negative perceptions vs. expectations.

	Non-Menthol Triers		Menthol Triers	
	QC (153) %	VRP (199) %	QC (30) %	SRP (150) %
<u>Taste Vs. Usual Brand</u>				
Better	12	4	9	7
Worse	66	77	61	64
<u>Taste Vs. Expectations</u>				
Better	44	35	43	41
Worse	39	43	30	45
<u>Aftertaste Vs. Usual Brand</u>				
Better	12	16	17	15
Worse	60	51	43	47
<u>Aftertaste Vs. Expectations</u>				
Better	28	29	43	35
Worse	38	36	22	38

POST-USE EVALUATION: USAGE OCCASIONS

- Stronger acceptance among triers for QC product

Usage Occasions	Non-Menthol Triers		Menthol Triers	
	$\frac{QC}{(153)}$ %	$\frac{VRP}{(199)}$ %	$\frac{QC}{(30)}$ %	$\frac{SRP}{(150)}$ %
As usual brand	13	4	6	9
Occasionally	27	31	44	29
If regular brand not available	34	30	27	31
Would not smoke brand	26	36	23	30

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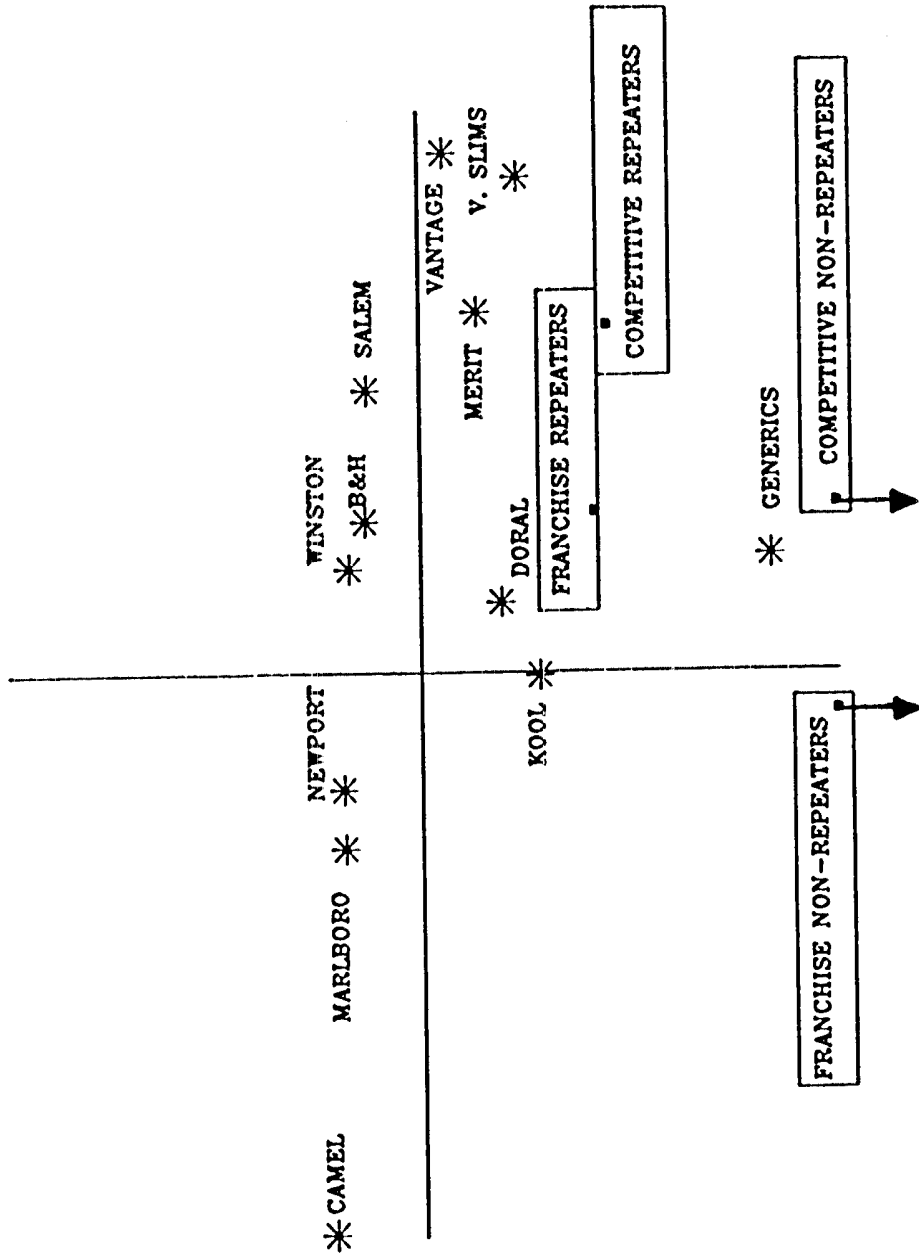
POST-TRIAL PERCEPTIONS:
TRIER REPEATERS VS. NON-REPEATERS

Taste acceptance was key determinant of repeat vs. non-repeat among brand triers

POST TRIAL PERCEPTIONS: TRIER REPEATERS VS. TRIER NON-REPEATERS

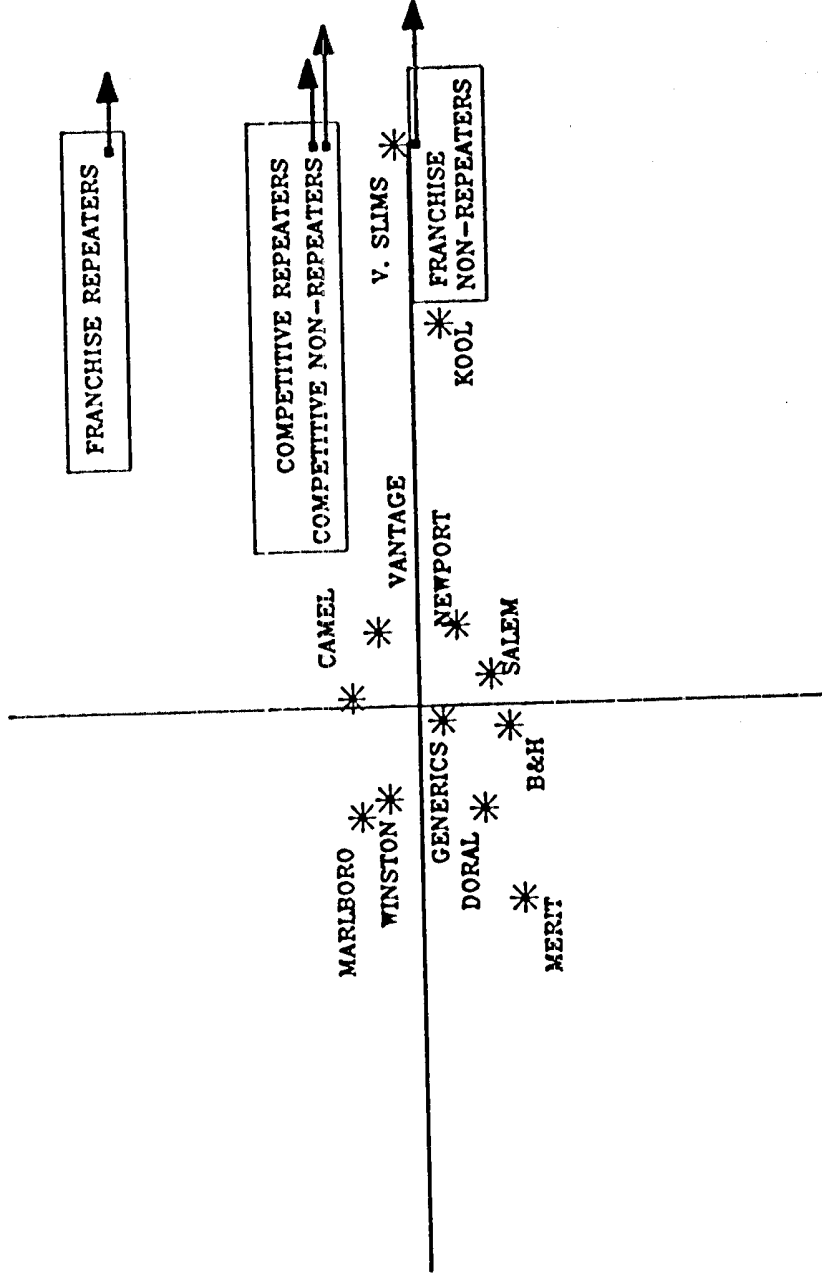
GOOD TASTE

SMOOTH/MILD



POST TRIAL PERCEPTIONS: TRIER REPEATERS VS. TRIER NON-REPEATERS

"IN - CROWD"



INITIAL REPEAT PURCHASE

- VANTAGE Excel's (QC) initial repeat purchase among triers was at the lower end of the range for previously tested line extensions but significantly higher than the level obtained by VRP in early 1989

Initial Repeat Purchase Among Triers

VANTAGE Excel - QC	32
Winston Ultra Lights	54
Camel - ATF	43
Camel - BT	38
Camel - FC	36
More Lights	35
SALEM Excel - SRP	33
SALEM Slim Lights	31
VANTAGE Excel - VRP	23
VANTAGE - VLN	18
Average for Line Extensions	35

INITIAL REPEAT PURCHASE

- Higher initial repeat purchase for QC versus the VRP product among competitive triers and non-menthol triers overall

	<u>QC</u> %		<u>Initial Repeat Purchase</u> <u>VRP</u> %
VANTAGE Excel	32	←	23
• Franchise Triers	26		21
• Competitive Triers	33	←	23
• Non-Menthol Triers	33	←	23
• Menthol Triers	29		NA

DEPTH OF REPEAT

- The QC product generates a somewhat stronger repurchase commitment among consumers motivated to try the brand than observed on VRP
- However, adoption is a problem for both the QC and VRP products - by the third repurchase occasion repeat among trier-repeaters should be in the 90% + range

*Directly repeatable
90% commitment*

	<u>QC</u>	<u>VRP</u>	
First repurchase among triers X	32%	23%	
	X	X	
Second repeat among first repeaters X	42%	46%	
	X	X	
Third repeat among second repeaters =	66%	56%	—
Repeat in all three repurchase opportunities	9%	6%	—

LONG TERM RETENTION

- Projected long term retention for VANTAGE Excel (QC) is low overall but somewhat higher than achieved by the VRP product in early 1989
- As expected, stronger retention among franchise triers than competitive triers (7.7% and 5.0% respectively)

Projected Retention %

VANTAGE Excel - QC	5.2
Winston Ultra Lights	18.9
SALEM Slim Lights	18.8
Camel - BT	15.8
Camel - FC	15.0
Camel - ATF	13.0
SALEM Excel - SRP	8.4
More Lights	7.3
VANTAGE Excel - VRP	4.7
VANTAGE - VLN	4.3
Average for Line Extensions	11.8

SUMMARY - PRODUCT ACCEPTANCE

- Acceptance among triers was improved with the QC product relative to VRP/SRP
 - Notice of ash flaking and unusual taste significantly down
 - Overall likeability, likeability vs. usual brand, and delivery vs. expectations generally stronger
- Reduced smoke was cited as primary likes for the product. However, taste acceptance and secondarily smoothness/mildness were the key factors in repeat vs. non-repeat purchase
- Initial repeat purchase improved versus VRP but was still at the lower end of the range for previously tested line extensions
- Analysis of depth of repeat indicates the QC product establishes a stronger post-use purchase commitment. However, adoption appears to be a problem for both QC and VRP
- Projected long term retention is low overall for QC but somewhat stronger than for VRP

BUSINESS PROJECTIONS

- Share of market selling rate
(4-6 months post DTS)
- Sources of business contribution

SHARE PROJECTION: BASELINE

Share Projections (4 - 6 Months Post DTS)

	Low %	Medium %	High %
● Awareness			
- Franchise	70	75	80
- Competitive	30	35	40
● Distribution	80	80	80
● Total	0.33	0.37	0.40
● Incremental to Brand Family	0.24	0.27	0.30
● Incremental to RJR	0.14	0.16	0.18

Marketing Assumptions

- Awareness
- Franchise
- Competitive
- Distribution

VANTAGE Excel SOM

- Total
- Incremental to Brand Family
- Incremental to RJR

SHARE PROJECTION

- VANTAGE Excel (QC) with four product styles generates a baseline share projection of 0.37% overall and 0.16% incremental - this is low relative to normative levels (which had only one or two product styles)

	Baseline <u>SOM Estimate</u> %	Incremental <u>SOM for RJR</u> %
VANTAGE Excel (QC)	0.37	0.16
Winston Ultra Lights	0.84	NA
Camel - FC	0.70	0.34
Camel - ATF	0.63	0.32
SALEM Slim Lights	0.56	NA
Camel - BT	0.47	0.17
More Lights	0.43	NA
SALEM Excel - SRP	0.42	0.13
VANTAGE Excel - VRP	0.36	0.19
VANTAGE - VLN	0.16	0.01
Average for Line Extensions	0.51	0.19+
Project CC (New Brand)	0.25	0.16

SHARE PROJECTION: BY BRAND STYLE

- The 100mm product styles generate more potential than the 85mm styles of the same flavor type. Maintaining distribution on four styles could be very difficult.

Baseline SOM Estimate %

0.37

VANTAGE Excel (QC) Total

0.28

Non-Menthol Styles

0.11

85mm

0.17

100mm

0.09

Menthol Styles

< 0.01

85mm

0.09

100mm

SOURCES OF BUSINESS: DEMOGRAPHICS

- Demographic sources of business skew to females, 35 year old+ smokers, college educated, and higher income consumers

Sources of Business Among
Competitive Smokers
Profile Index
%

Males	39	77	124
Females	61		
18-24	11	85	
25-34	11	37	141
35-49	45		129
50+	33		
College	55	151	
Non-College	45	70	
< \$25,000	39	78	
\$25,000 +	61		123

SOURCES OF BUSINESS: USAGE





- VANTAGE Excel draws a disproportionate share of business from low tar and RJR Non-VANTAGE smokers

	Profile %	Sources of Business Among Competitive Smokers Index
FF	20	43
FFLT	49	121
ULT	31	251
Menthol	31	110
Non-Menthol	69	95
RJR	42	149
PM	38	86
Other	20	73
High Emphasis Markets	45	109
Low Emphasis Markets	55	94

REVIEW OF REDUCED SMOKE PROPOSITIONS OVER TIME

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- Analysis of response to the CC, VRP, and QC propositions indicate that 6% to 7% of smokers (Non-Menthol) have been motivated to try and repurchase a reduced smoke product. While trial and repeat rates have varied by proposition, this consistency suggests a limit for the potential of this type of product.

	CC	VRP	QC
Year	1985	1989	1990
Recall (Total)	48%	52%	54%
Trial Rate	15% 	31% 	20%
Repeat Rate	41% 	23% 	33%
Trial x Repeat	6.3%	7.0%	6.6%

Note: All three propositions reflect response among non-menthol smokers

CONCLUSIONS/IMPLICATIONS

- VANTAGE Excel has not demonstrated the potential for a successful market launch.
 - Trial potential has fallen off with consumers perceiving the proposition as less important, less different, less believable, and less likeable than was the case in early 1989. Changes in marketplace conditions (additional restrictions on smoking in public places and/or the introduction of other reduced smoke products) are hypothesized as diminishing the impact and interest of the proposition.
 - While the QC product demonstrated improvement relative to VRP, initial repeat purchase and projected longer term retention remain low and are problematic to a successful introduction.
- The opportunity for a reduced smoke product appears contingent on delivering a product which provides taste satisfaction comparable to, if not better than, interested consumers' usual brand.
 - There appears to be a relatively small group of consumers motivated to make a trial purchase and at least one repurchase on this type of product (only 6% to 7% of smokers with total marketing reach - 100% awareness and distribution). This strongly suggests limited market potential for the basic concept.
 - Taste acceptance is the key determinant of longer term retention, smokers appeal unwilling to trade-off taste for the secondary social benefits.

SOURCE OF TRIAL INDICES: QC vs. VRP

Index of Source of Trial Among Competitive Smokers

	<u>QC</u>	<u>VRP</u>
Males	76	99
Females	125	101
18-24	92	44
25-34	64	112
35-49	126	140
50+	112	75
College	119	116
Non-College	89	91
Less than \$15M	60	75
\$15M - \$25M	109	96
\$25M+	115	116
85mm	77	94
100mm +	130	109
FF	70	69
FFLT	116	114
ULT	163	176
Menthol	93	-
Non-Menthol	102	100
RJR	111	126
PM	88	84
Other	109	100
High Emphasis Markets	115	NA
Low Emphasis Markets	89	NA

SOURCE OF BUSINESS INDICES: QC vs. VRP

Index of Source of Business Among Competitive Smokers

	<u>QC</u>	<u>VRP</u>
Males	77	87
Females	124	115
18-24	85	41
25-34	37	97
35-49	141	159
50+	129	71
College	151	142
Non-College	70	76
< \$25m	78	96
\$25m +	123	104
85mm	61	98
100mm +	152	103
FF	43	38
FFLT	121	139
ULT	251	206
Menthol	110	-
Non-Menthol	96	100
RJR	149	120
PM	86	80
Other	73	126
High Emphasis Markets	109	NA
Low Emphasis Markets	94	NA

POST-USE ATTRIBUTES

Non-Menthol
OC (354)

Menthol
OC (125)

SRP
(240)

Non-Menthol
VRP (393)

Good Taste

- Right amount of tobacco taste
- Satisfying cigarette
- Natural tobacco taste
- High quality cigarette
- Does not leave mouth dry
- Smooth
- Fresh aftertaste
- Not harsh
- Slow burn rate

3.8
3.8
3.8
4.4
4.3
4.8
3.6
5.3
5.2

←
←
←
←
←
←
←
←
←

3.6
3.5
3.8
4.5
4.3
4.6
3.6
5.0
4.7

4.3
4.1
4.3
4.9
4.7
4.6
4.3
5.1
4.2

Smooth/Mild

- Mild
- Low tar and nicotine
- Not harsh
- Smooth
- [Not] strong tasting

5.1
5.2
5.3
4.8
2.6

←
←
←
←
←

5.0
5.2
5.0
4.6
2.8

4.6
4.7
4.6
4.4
3.0

5.0
4.9
5.1
4.6
3.1

POST-USE ATTRIBUTES (Con't)

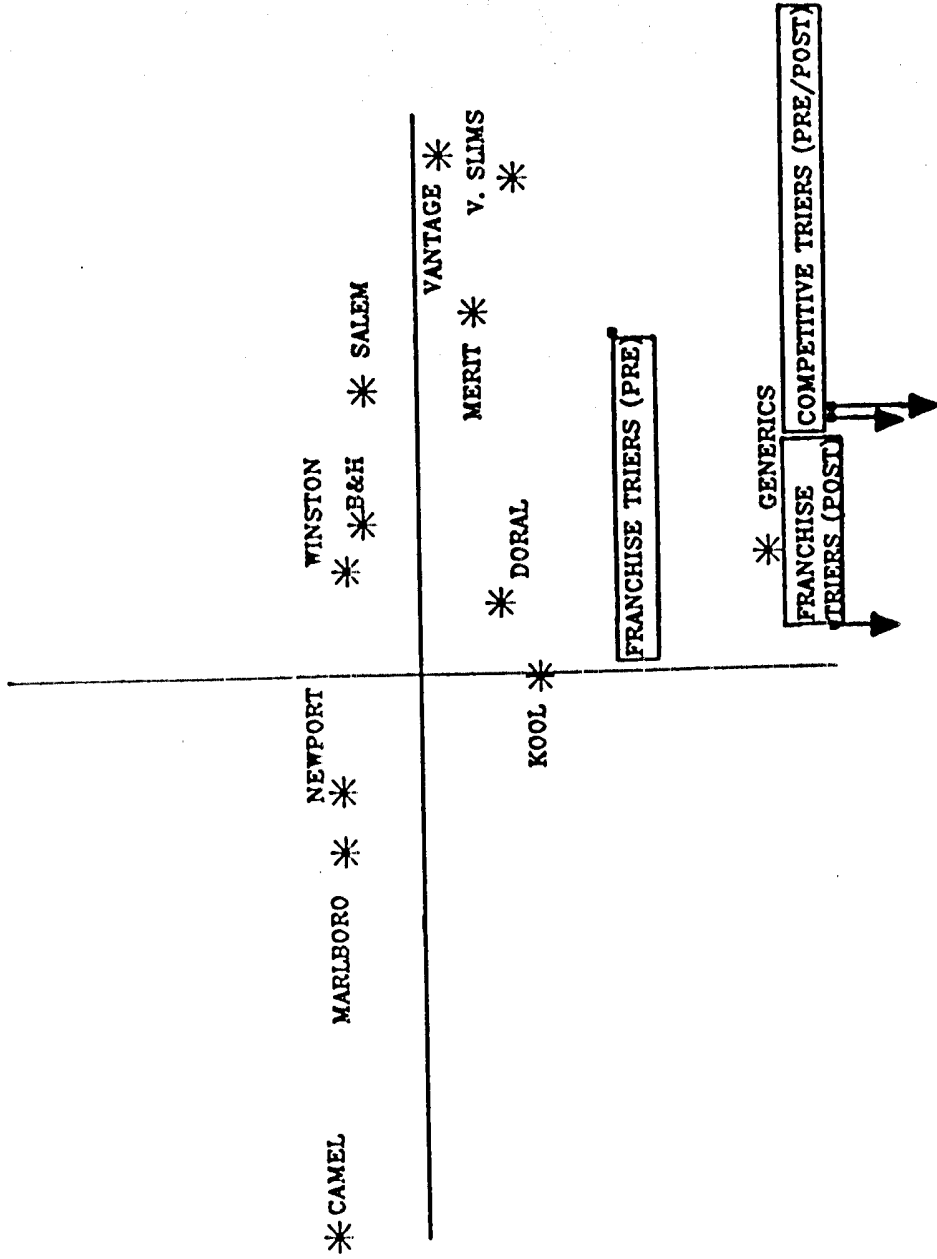
50754 3335

	Non-Menthol		Menthol	
	QC (354)	VRP (393)	QC (125)	SRP (240)
<u>In-Crowd Brand</u>				
Adult smokers 25 years or more	3.6	3.2	3.2	3.4
18-24 year old smokers	2.8	3.3	2.5	3.7
Men	2.6	3.1	2.5	3.3
Modern contemporary person	3.8	3.9	3.6	4.2
My friends would smoke	3.2	3.3	3.2	3.8
Person who makes own decisions	3.7	4.1	3.6	4.1
Concerned about impressions they make	3.4	3.6	3.2	4.0
Women	3.2	3.5	3.0	3.7
Smokers who care about others	4.5	5.0	3.9	5.2
Could be popular in 90's	4.7	4.9	4.5	5.2
<u>Different</u>				
Gimmicky	3.2	4.1	2.9	3.8
Different and unique	5.0	5.6	5.0	5.8
Smokers who care about others	4.5	5.0	3.9	5.2
Concerned about impression they make	3.4	3.6	3.2	4.0
Slow burn rate	5.2	4.7	5.2	4.2

PRE & POST PERCEPTIONS OF VANTAGE EXCEL

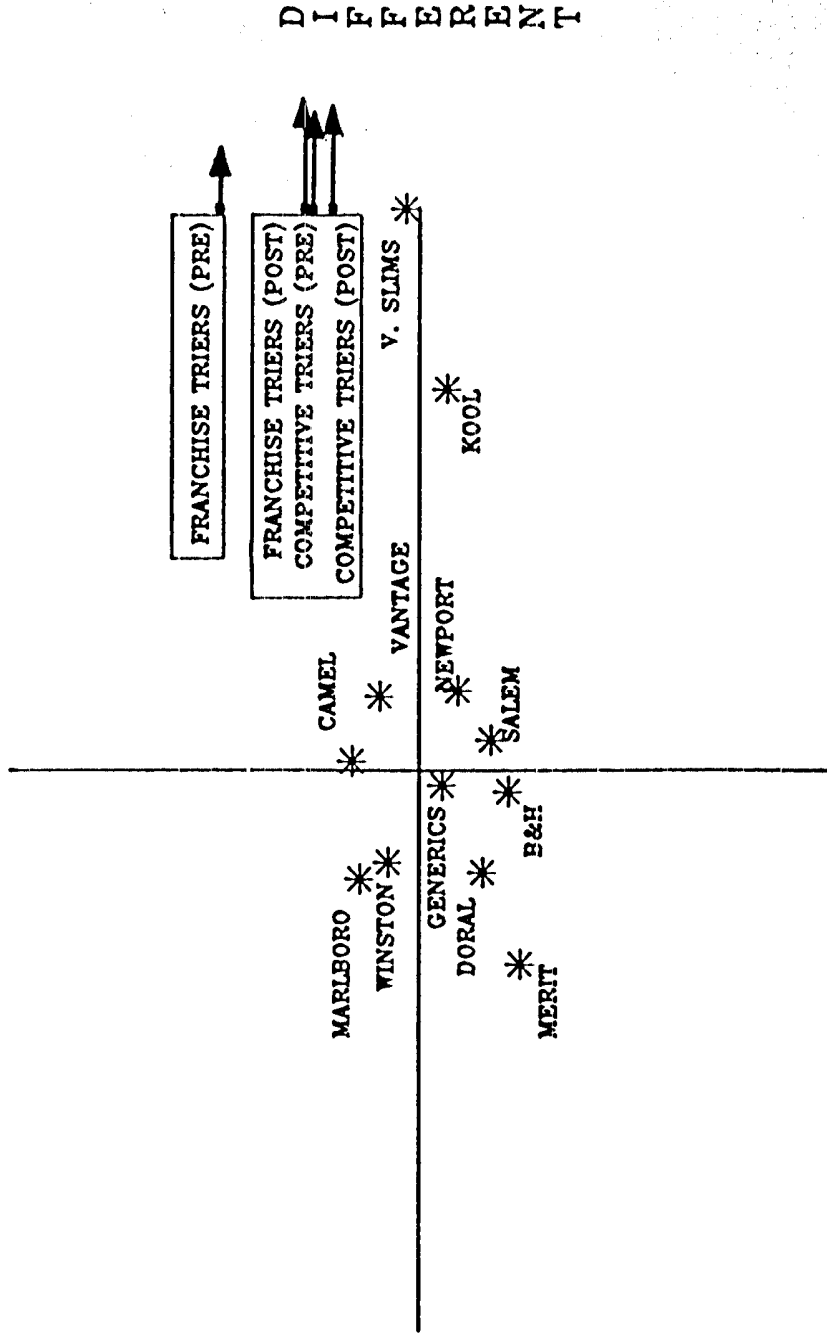
GOOD TASTE

S M O O T H / M I L D



PRE & POST PERCEPTIONS OF VANTAGE EXCEL

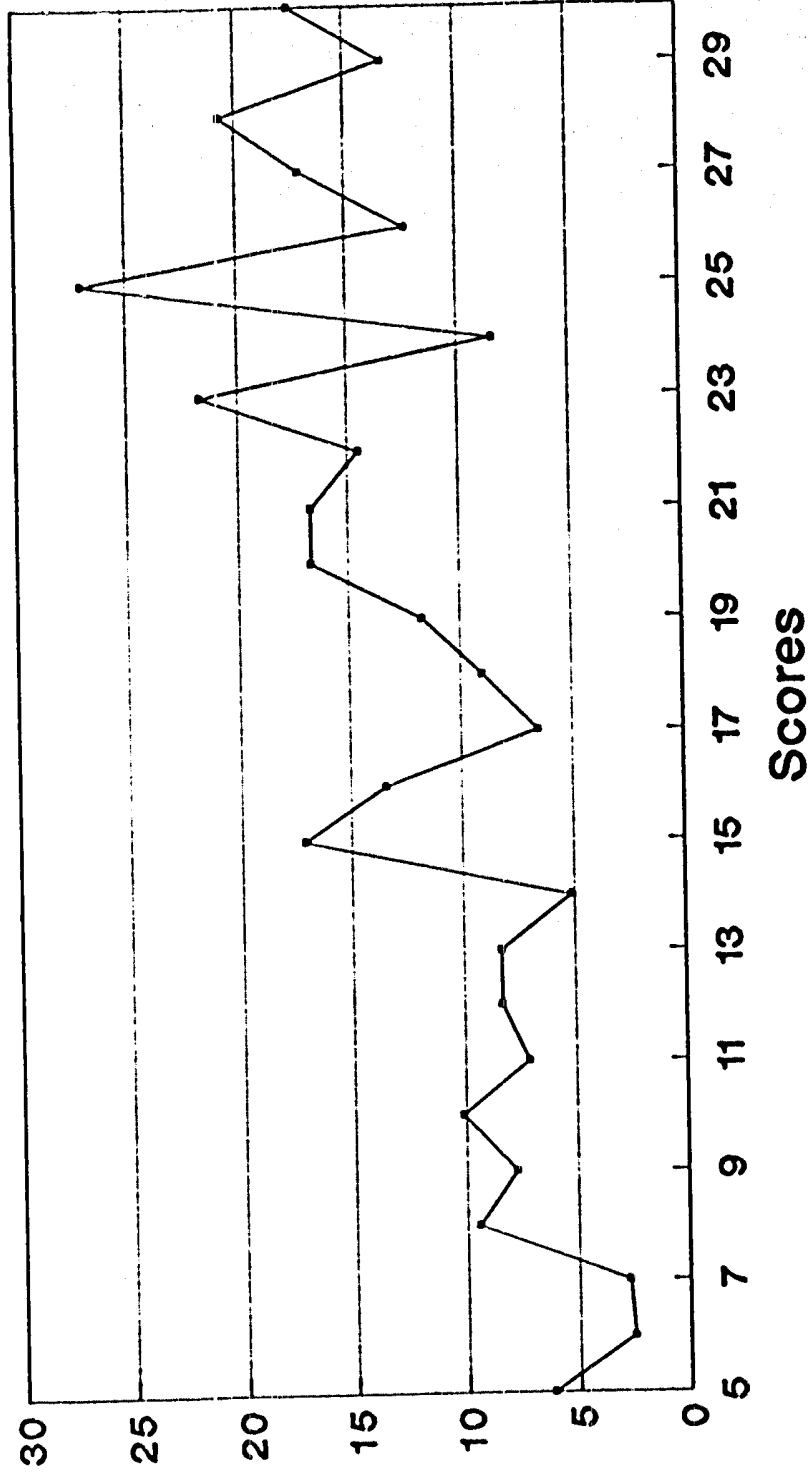
"IN - CROWD"



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VANTAGE EXCEL

Personal Concerns



50754 3339

VANTAGE EXCEL

Social Guilt Scores

