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FROM B. RYAN/smc DATE February 15, 1982
SUBJECT SMOKER PERSONALITY STUDY REPORT #3 - VICEROY

Please find attached a copy of the presentation made on
February 2, 1982 by F. Van Bortel, McCann-Erickson.


B. R.

Attachment

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SMOKER PERSONALITY STUDY

REPORT #3

AN IN-DEPTH LOOK AT

VICEROY

IN ITS COMPETITIVE ENVIRONMENT

Prepared By
McCann-Erickson, Inc.
February, 1982

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SPECIAL REPORT #3
AN IN-DEPTH LOOK AT VICEROY IN ITS COMPETITIVE ENVIRONMENT

- PART I DEMOGRAPHIC CHARACTER OF THE FRANCHISE
- PART II BRAND PERFORMANCE PROFILE
 - AWARENESS (UNAIDED RECALL)
 - BRAND TRIAL
 - BRAND USE
 - CONVERSION OF AWARENESS TO TRIAL
 - CONVERSION OF TRIAL TO PREFERENTIAL USE
- PART III SMOKING BEHAVIOR AND ATTITUDES
- PART IV PSYCHOLOGICAL CHARACTERISTICS OF SMOKERS IN THE FRANCHISE
- PART V BRAND IMAGE
 - ALL SMOKERS
 - BRAND SMOKERS
- PART VI SUMMARY AND ACTION RECOMMENDATIONS

Prepared for: Brown & Williamson
by: McCann-Erickson, Inc.
FEBRUARY, 1962

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PART I

DEMOGRAPHIC CHARACTER OF THE USER FRANCHISES OF VICEROY AND
THE FOUR MAJOR COMPETITORS SHOWING MOST INTERACTION WITH
VICEROY (REPORT #2)

- WINSTON
- TAREYTON
- MORE
- MARLBORO

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THE VICEROY FRANCHISE:

- YOUTH MARKET DEFICIT

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DEMOGRAPHIC CHARACTER OF REGULAR BRAND FRANCHISES

% USING BRAND MOST OFTEN

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %	<u>GRAND TOTAL</u> %
<u>TOTAL (3022)</u>	1.7	11.7	16.8	1.5	1.8	33.5
<u>MALES (1526)</u>	1.7	12.5	21.8	.7	1.4	38.1
<u>FEMALES (1496)</u>	1.7	10.8	11.7	2.3	2.2	28.7
<u>WHITE (2674)</u>	1.7	11.5	18.5	1.5	1.8	35.0
<u>BLACK (350)</u>	1.9	13.4	3.9	1.6	2.1	22.9
<u>21/29 (870)</u>	0.7	9.7	29.2	.9	.2	40.7
<u>30/39 (870)</u>	2.2	15.5	16.4	2.1	2.0	38.2
<u>40/49 (585)</u>	2.2	10.6	11.9	1.6	1.8	28.1
<u>50+ (735)</u>	1.9	10.7	6.7	1.4	3.5	24.2
<u>LOWER CLASS (866)</u>	2.1	13.5	18.2	1.1	.9	35.8
<u>MIDDLE CLASS (1439)</u>	1.3	11.5	17.0	1.7	2.4	33.9
<u>UPPER CLASS (698)</u>	2.0	9.7	14.9	1.5	1.8	29.9

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WE CAN GAIN MORE INSIGHT INTO THE DEMOGRAPHIC CHARACTER
OF THE BRAND FRANCHISES THROUGH EXAMINATION OF THE STEPS
THROUGH WHICH BRAND FRANCHISES ARE BUILT.

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PART II

BRAND PERFORMANCE PROFILE

FOR

FIVE MAJOR BRANDS

-
- % AWARE (NAMED BRAND SPONTANEOUSLY)
 - % EVER TRIED (NO TIME LIMIT)
 - % USING BRAND MOST OFTEN

RATIO - % OF AWARE TRYING

RATIO - % OF TRIERS USING MOST

RATIO PRIMARY USE DELIVERY PER POINT OF AWARENESS

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TOTAL MARKET

VICEROY HAS RELATIVELY LOW AWARENESS.

VICEROY TRIAL IN RELATION TO AWARENESS IS FAIR.

VICEROY CONVERSION OF TRIAL TO REGULAR USE IS AT THE SAME LEVEL AS TAREYTON, AND WELL BELOW THE OTHER THREE BRANDS.

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BRAND PERFORMANCE PROFILE

VICEROY VS. MAJOR COMPETITORS

	<u>BRAND FAMILY TOTAL</u>				
	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
% AWARE	21.1	75.0	71.2	24.0	18.1
% EVER TRIED	7.0	37.8	39.9	8.4	4.2
% USING MOST	1.7	11.7	16.8	1.5	1.0
% OF AWARE TRYING	37	50	56	35	23
% OF TRIERS USING MOST	37	31	42	18	43
PRIMARY USE DELIVERY PER POINT OF AWARENESS	.08	.16	.24	.06	.10

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THE MALE MARKET

VICEROY HAS LOW AWARENESS

LOW CONVERSION OF AWARENESS TO TRIAL

LOW CONVERSION OF TRIAL TO PRIMARY USE

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BRAND PERFORMANCE IN THE MALE MARKET

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	22.1	76.7	73.9	23.0	15.3
EVER TRIED	7.4	40.6	46.9	6.5	2.6
USE MOST	1.7	12.5	21.8	.7	1.4
% OF AWARE TRYING	33	53	63	28	17
% OF TRIERS USING MOST	23	31	46	11	54
PRIMARY USE DELIVERY					
PER POINT OF AWARENESS	.08	.16	.29	.03	.09

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THE FEMALE MARKET

VICEROY SHOWS:

- LOW AWARENESS
- GOOD CONVERSION OF AWARENESS TO TRIAL
- POOR CONVERSION OF TRIAL TO PRIMARY USAGE

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BRAND PERFORMANCE PROFILE
IN THE FEMALE MARKET

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	20.1	73.3	68.5	25.1	20.9
EVER TRIED	8.2	35	32.8	10.4	5.9
USE MOST	1.7	10.8	11.7	2.3	2.2
% OF AWARE TRYING	41	48	48	41	28
% OF TRIERS USING MOST	21	31	36	22	37
PRIMARY USE DELIVERY					
PER POINT OF AWARENESS	.08	.15	.17	.09	.11

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THE WHITE MARKET

VICEROY AND TAREYTON SHOW SIMILAR PERFORMANCE AT ALL LEVELS;
LOW IN RELATION TO MARLBORO AND WINSTON.

MORE, WITH A LOWER LEVEL OF AWARENESS, ALSO SHOWS A LOW
LEVEL OF TRIAL IN RELATION TO AWARENESS, BUT EXCELLENT
CONVERSION OF TRIAL TO PRIMARY USE.

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BRAND PERFORMANCE PROFILE
IN THE WHITE MARKET (2674)

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>JAREYTON</u> %	<u>MORE</u> %
AWARE	20.8	75.3	74.2	24.2	17.5
EVER TRIED	7.4	38.2	43.4	8.5	3.9
USE MOST	1.7	11.5	18.5	1.5	1.8
% OF AWARE TRYING	36	51	58	35	22
% OF TRIERS USING MOST	23	30	43	18	46
PRIMARY USE DELIVERY PER POINT OF AWARENESS	.08	.15	.25	.06	.10

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THE BLACK MARKET

VICEROY SHOWS: ABOVE AVERAGE AWARENESS
GOOD TRIAL IN RELATION TO AWARENESS
POOR CONVERSION OF TRIAL TO USED MOST

NOTE: MARLBORO PERFORMS VERY BADLY IN THIS MARKET: WINSTON
IS OUTSTANDING IN THIS MARKET.

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BRAND PERFORMANCE PROFILE
 IN THE BLACK MARKET (350)

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	23.3	73.4	49.0	23.1	23.1
EVER TRIED	10.9	35.4	13.7	7.5	6.6
USED MOST	1.9	13.4	3.9	1.6	2.1
% OF AWARE TRYING	47	48	28	32	29
% OF TRIERS USING MOST	17	38	14	21	32
PRIMARY USE DELIVERY PER POINT OF AWARENESS	.08	.18	.08	.07	.09

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THE 21/29 AGE GROUP

VICEROY HAS A SIGNIFICANT AWARENESS DEFICIT IN THIS GROUP.

IT WOULD APPEAR THAT WHILE TRIAL IN RELATION TO AWARENESS IS NORMAL TO HIGH IN THIS AGE GROUP, CONVERSION OF TRIAL TO PRIMARY USAGE IS VERY DIFFICULT.

MARLBORO SHOWS AN OUTSTANDING PERFORMANCE IN THIS AGE GROUP.

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BRAND PERFORMANCE PROFILE
IN THE 21/29 AGE GROUP

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	17.4	81.7	84.1	23.5	21.7
EVER TRIED	5.1	41.8	62.7	7.5	2.6
USE MOST	.7	9.7	29.2	.9	.2
% OF AWARE TRYING	29	51	75	32	12
% OF TRIERS USING MOST	14	23	47	12	8
PRIMARY USE DELIVERY PER POINT OF AWARENESS	.04	.12	.35	.04	.01

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THE 30/39 AGE GROUP

VICEROY PERFORMANCE BETTER THAN IN THE
YOUNGER AGE GROUP.

WINSTON AND MARLBORO SHOW GREATER SIMILARITY.

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BRAND PERFORMANCE PROFILE
 IN THE 30/39 AGE GROUP

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
	%	%	%	%	%
AWARE	25.2	80.7	74.0	25.5	18.4
EVER TRIED	8.6	43.7	41.6	9.9	4.2
USE MOST	2.2	15.5	16.4	2.1	2.0
% OF AWARE TRYING	34	54	56	39	23
% OF TRIERS USING MOST	26	35	39	21	48
PRIMARY USE DELIVERY					
PER POINT OF AWARENESS	.09	.19	.22	.08	.11

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THE 40/49 AGE GROUP

SIMILAR TO THE 30/39 AGE GROUP

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BRAND PERFORMANCE PROFILE
IN THE 40/49 AGE GROUP

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	23.4	73.5	64.9	23.1	15.5
EVER TRIED	10.7	34.7	27.3	8.8	5.1
USED MOST	2.2	10.6	11.9	1.6	1.8
% OF AWARE TRYING	46	47	42	38	38
% OF TRIERS USING MOST	21	31	44	18	35
PRIMARY USE DELIVERY PER POINT OF AWARENESS	.09	.14	.18	.07	.12

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THE 50+ MARKET

VICEROY SHOWS THE BEST DELIVERY OF PRIMARY USE PER POINT
OF AWARENESS IN THIS MARKET.

MARLBORO SHOWS ITS POOREST PERFORMANCE.

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BRAND PERFORMANCE PROFILE
IN THE 50+ AGE GROUP

	<u>VICEROY</u> %	<u>WINSTON</u> %	<u>MARLBORO</u> %	<u>TAREYTON</u> %	<u>MORE</u> %
AWARE	18.9	62.1	58.3	23.7	15.5
EVER TRIED	8.0	28.8	21.9	7.5	5.5
USED MOST	1.9	10.7	6.7	1.4	3.5
% OF AWARE TRYING	42	46	38	32	35
% OF TRIERS USING MOST	24	37	31	19	64
PRIMARY USE DELIVERY					
PER POINT OF AWARENESS	.10	.17	.11	.06	.22

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PERFORMANCE PROFILE OVERVIEW

WHILE THERE ARE SOME VARIABILITIES IN AWARENESS, TRIAL RATION AND USE CONVERSION, WHAT IS REMARKABLE FOR VICEROY IS THE SEGMENT UNIFORMITY OF DELIVERY OF POINTS OF PRIMARY USAGE PER POINT OF AWARENESS.

SEX AND RACE DELIVERY IS IDENTICAL. YOUTH MARKET AND MIDDLE CLASS DELIVERY IS LOW AND DELIVERY IN THE OLD MARKET IS HIGHEST.

WINSTON SHOWS A SIMILAR STABILITY ACROSS SEGMENTS. WHILE MARLBORO CLEARLY GETS ITS TOTAL DELIVERY PRIMARILY FROM YOUNG, WHITE MALES.

MORE SHOWS ITS GREATEST STRENGTHS IN THE OLDER, MORE UPSCALE SEGMENT OF THE MARKET.

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BRAND DELIVERY OF PRIMARY USAGE
PER POINT OF AWARENESS OF MARKET SEGMENTS

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
TOTAL SMOKERS	.08	.16	.24	.06	.10
MALE	.08	.16	.29	.03	.09
FEMALE	.08	.15	.17	.09	.11
WHITE	.08	.15	.25	.06	.10
BLACK	.08	.18	.08	.07	.09
21/29	.04	.12	.35	.04	.01
30/39	.09	.19	.22	.08	.11
40/49	.09	.14	.18	.07	.12
50+	.10	.17	.11	.06	.22
LOWER CLASS	.10	.18	.26	.06	.05
MIDDLE CLASS	.06	.15	.24	.07	.13
UPPER CLASS	.09	.13	.21	.05	.10

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PERFORMANCE PROFILE OVERVIEW (CONTINUED)

THERE IS EVERY REASON TO BELIEVE THAT VICEROY COULD INCREASE ITS PRIMARY USER FRANCHISE IN ALL SEGMENTS SIMPLY BY INCREASING ITS AWARENESS.

HOWEVER, ASSUMING THE SAME IMAGE AND PRODUCT DELIVERY, PER POINT OF AWARENESS WOULD BE ONLY HALF AS EFFICIENT AS WINSTON.

IN EFFECT, IF VICEROY RAISED ITS AWARENESS LEVEL TO 75%, LIKE WINSTON, ITS PRIMARY USER SHARE WOULD ONLY BE ABOUT 6%. SINCE 75% WOULD APPEAR TO BE AN EFFECTIVE CEILING ON AWARENESS, 6% SHARE OF PRIMARY USERS WOULD APPEAR TO BE A MAXIMUM GOAL FOR VICEROY AT CONSIDERABLE COST.

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PERFORMANCE PROFILE OVERVIEW (CONTINUED)

THE ALTERNATIVE, OF COURSE, IS TO SEEK A CHANGE IN
IMAGE AND/OR PRODUCT THAT WILL GENERATE A HIGHER YIELD
PER POINT OF AWARENESS - SO LONG AS IT DOES NOT OFFEND
THE CURRENT FRANCHISE.

LET'S NOW SEE IF THERE ARE IMPORTANT DIFFERENCES BETWEEN
VICEROY USERS AND OTHER BRAND USERS IN TERMS OF THEIR
SMOKING BEHAVIOR AND ATTITUDES.

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PART III

SMOKING BEHAVIOR AND ATTITUDES

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SMOKERS OF BRANDS IN VICEROY'S COMPETITIVE SET ARE MORE ADDICTED TO SMOKING THAN SMOKERS IN GENERAL.

IN ADDITION, VICEROY SMOKERS ARE DIFFERENTIATED FROM COMPETITIVE BRAND USERS IN THAT THEY SMOKE PRIMARILY FOR STIMULATION OR PEP AND THEY TEND TO BE HEAVIER SMOKERS.

FURTHER, VICEROY SMOKERS, ALONG WITH SMOKERS OF MORE, DO NOT EXPRESS THE DESIRE TO QUIT SMOKING.

SMOKERS OF MORE STAND OUT AS BEING PLEASURE/RELAXATION SMOKERS WHO SMOKE INFREQUENTLY.

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NUMBER OF CIGARETTES SMOKED PER DAY

CATEGORY	AVERAGE	VICEROY	WINSTON	MARLBORO	TAREYTON	MORE
	(1012)	(51)	(354)	(507)	(45)	(55)
HEAVY (30 OR MORE)	45	53	50	43	48	29
MEDIUM (20-29)	37	28	34	40	36	42
LIGHT (19 OR LESS)	18	19	16	17	16	29

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HORN SCALES ON SMOKING BEHAVIOR AND ATTITUDES
 (SCORES STANDARDIZED TO ZERO FOR THE AVERAGE OF
 THE TOTAL SMOKER POPULATION)

CATEGORY	WINSTON	NARLBORO	TAREYTON	MORE
AVERAGE	(354)	(507)	(45)	(55)
(1012)	(51)	(507)	(45)	(55)
HABIT	+17	-11	-13	+15
ADDICTION	+14	+1	+18	+12
REDUCTION OF NEGATIVE AFFECT	+13	-2	+13	+2
PLEASURE/RELAXATION	-2	-2	+1	+31
STIMULATION	+23	-6	-23	+3
SENSORY - MOTOR GRATIFICATION	+3	+6	-16	+8

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HORN SCALE ITEMS THAT REPRESENT STIMULATION

	<u>CATEGORY AVERAGE</u> (1012)	<u>VICEROY</u> (51)	<u>WINSTON</u> (354)	<u>MARLBORO</u> (507)	<u>LAREYTON</u> (45)	<u>MORE</u> (55)
I SMOKE CIGARETTES TO KEEP MYSELF FROM SLOWING DOWN	29	(37)	31	29	19	25
I SMOKE CIGARETTES TO STIMULATE ME, TO PERK MYSELF UP	41	(54)	42	41	31	44

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ATTITUDE TOWARDS QUITTING

<u>CATEGORY</u>	<u>AVERAGE</u>	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
	(1012)	(51)	(354)	(507)	(45)	(55)
% AGREEMENT WITH						
"I'VE CUT DOWN BUT I'D REALLY LIKE TO CUT OUT SMOKING ALTOGETHER	51	39	53	52	53	38

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LET'S NOW SEE IF THE VICEROY USER'S PERSONALITY DIFFERS FROM COMPETITIVE BRAND SMOKERS.

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PART IV
PSYCHOLOGICAL CHARACTERISTICS OF SMOKERS
IN THE VICEROY FRANCHISE

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PERSONALITY OVERVIEW

THE VICEROY SMOKER IS CHARACTERIZED BY

TRUSTING AND OPTIMISTIC ATTITUDE ABOUT PEOPLE.

SELF DISCIPLINE AND BELIEF IN CONTROL OF OWN FATE.

ACHIEVEMENT ORIENTATION IN WORK.

SOME INSECURITY ABOUT ABILITY TO INTERACT WELL
WITH OTHERS.

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PERSONALITY ITEMS FOR WHICH VICEROY SMOKERS SHOW
DIFFERENCES FROM COMPETITIVE BRAND SMOKERS

(PERCENT AGREEMENT)

	<u>CATEGORY AVERAGE</u>	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
<u>TRUST</u>						
MOST PEOPLE ARE OUT TO GET MORE THAN THEY GIVE	60	52	59	59	63	60
I THINK THE AVERAGE PERSON IS HONEST	65	71	68	62	68	66
SOME PEOPLE DELIBERATELY DO THINGS TO HURT YOU	55	46	58	55	54	58
I FEEL THAT OTHER PEOPLE MANIPULATE ME	44	34	45	43	49	45
I AM MORE INTERESTED IN WHAT PEOPLE DO THAN IN WHY THEY DO IT	53	58	54	53	55	52
PEOPLE WHO ARE ALWAYS OPTI- MISTIC AREN'T REALISTIC ABOUT LIFE	50	42	49	46	47	53

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PERSONALITY ITEMS FOR WHICH VICEROY SMOKERS SHOW
DIFFERENCES FROM COMPETITIVE BRAND SMOKERS

(PERCENT AGREEMENT)

	CATEGORY AGREEMENT	VICEROY	WINSTON	MARLBORO	TAREYTON	MORE
<u>SELF-DISCIPLINE</u>						
I LIKE TO DO THINGS ON THE SPUR OF THE MOMENT	68	60	70	68	66	67
IT'S MORE FUN TO BE SELF-INDUL- GENT THAN HIGHLY DISCIPLINED	57	49	58	59	47	61
<u>CONTROL OVER SELF</u>						
MANY OF THE UNHAPPY THINGS IN MY LIFE ARE DUE TO BAD LUCK	38	28	37	42	27	38
GETTING A GOOD JOB DEPENDS ON BEING AT THE RIGHT PLACE AT THE RIGHT TIME	62	52	62	63	57	66

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PERSONALITY ITEMS FOR WHICH VICEROY SMOKERS SHOW
DIFFERENCES FROM COMPETITIVE BRAND SMOKERS

(PERCENT AGREEMENT)

	CATEGORY AGREEMENT	VICEROY	WINSTON	MARLBORO	TAREYTON	MORE
	(1012)	(51)	(354)	(507)	(45)	(55)
<u>ACHIEVEMENT IN WORK</u>						
I WOULDN'T MIND DOING WHAT I'M DOING NOW FOR AS LONG AS I WORK	53	42	54	52	58	60
I PREFER A JOB WHERE I KNOW JUST WHAT IS EXPECTED OF ME	78	73	79	77	90	78
<u>SOCIAL INTERACTION</u>						
NO MATTER HOW HARD I TRY, SOME PEOPLE JUST DON'T LIKE ME	44	50	43	48	41	35
I ENJOY BEING WITH PEOPLE WHO GREW UP THE SAME WAY I DID	70	63	72	69	74	69

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LET'S NOW LOOK AT THE IMAGE OF EACH OF THESE BRANDS.

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PART V

BRAND IMAGERY

- AMONG ALL SMOKERS

- AMONG BRAND USERS

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IN OUR EXAMINATION OF BRAND IMAGE IMPRESSIONS, WE BELIEVE IT IS NECESSARY TO LOOK AT THREE GROUPS OF SMOKERS FOR EACH OF THE FIVE BRANDS IN VICEROY'S COMPETITIVE SET.

1. PRIMARY USERS OF THE BRAND
2. SECONDARY USERS OF THE BRAND
3. AWARE NON-USERS OF THE BRAND

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SINCE SMOKERS HAD TO CHOOSE ONE BRAND FOR EACH OF THE 35 BRAND USER DESCRIPTIONS, THE INCIDENCE OF MENTION FOR ANY BRAND IS RELATIVELY SMALL, ALTHOUGH PRIMARY USERS TEND TO MENTION THEIR OWN BRAND MORE OFTEN THAN OTHER BRANDS.

OUR ANALYTIC PROCEDURE IS THE ONE WE HAVE USED PREVIOUSLY. THE MEDIAN INCIDENCE OF MENTION OF THE BRAND IS OUR EXPECTED AND THE ANALYSIS IS BASED ON DEVIATION FROM THE EXPECTED, THE OBSERVED.

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HOWEVER, WHEN WE NEED TO EXAMINE 35 ITEMS BY FOUR BRANDS BY THREE AUDIENCES, SHOWING THE EXPECTED AND THE OBSERVED FOR EACH COMPUTATION IS CUMBERSOME AND CONFUSING.

THEREFORE, WE WILL USE AN INDEX, WHICH IS SIMPLY THE OBSERVED DIVIDED BY THE EXPECTED.

ON A "RULE OF THUMB" BASIS, WE CAN READ OUR INDEX NUMBERS AS FOLLOWS:

<u>INDEX</u>	<u>INTERPRETATION</u>
200 & UP	HIGH IDENTIFICATION WITH BRAND
120-199	PROBABLE BRAND IDENTIFICATION
81-119	WITHIN NORMAL VARIANCE
80 OR LESS	LOW IDENTIFICATION WITH BRAND

GIVEN THE LARGE SAMPLE SIZES, THESE CRITERIA ARE TO BE CONSIDERED STRINGENT.

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ACROSS ALL 35 IMAGE ITEMS, MARLBORO AND WINSTON HAVE THE HIGHEST LEVEL OF RESPONSE AMONG EACH USER GROUP.

FOR THESE TWO BRANDS, INCREASED INVOLVEMENT WITH THE BRAND RESULTS IN A GREATER RESPONSE RATE.

FOR VICEROY, TAREYTON AND MORE, SECONDARY USERS ARE NO MORE LIKELY TO MENTION THEIR SECONDARY BRAND THAN ARE AWARE NON-USERS - THE SECONDARY USER'S PORTRAIT OF VICEROY, TAREYTON AND MORE IS NO MORE VIVID THAN A NON-USER OF THESE BRANDS.

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MEDIAN % RESPONSE AMONG
PRIMARY, SECONDARY AND AWARE NON-USERS

	<u>VICEROY</u>	<u>WINSTON</u>	<u>TAREYTON</u>	<u>MORE</u>	<u>MARLBORO</u>
PRIMARY SMOKERS	7.6	11.2	4.8	8.7	14.5
SECONDARY SMOKERS	3.8	8.3	2.8	3.5	10.6
AWARE NON-SMOKERS	3.6	7.3	3.2	3.7	7.7

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PART V - A

BRAND IMAGERY AMONG AWARE NON-USERS

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THERE APPEARS TO BE NO COMMON IMAGERY THREAD ACROSS ALL 5 OF THESE BRANDS. HOWEVER, THERE IS A COMPLEX NETWORK OF INDIVIDUAL BRAND IMAGERY CONNECTIONS.

VICEROY IS SIMILAR TO WINSTON AND MARLBORO BY BEING SEEN AS:

- A PERSON WHO MAKES FRIENDS EASILY
- A PERSON WITH MAGNETISM

VICEROY AND MARLBORO ARE

- IN CONTROL OF THE SITUATION
- TRUST OWN INSTINCTS

VICEROY IS LINKED TO TAREYTON AND MORE AS:

- A PERSON WHO SEEMS DIFFICULT TO REACH
- A HIGHLY INTENSE PERSON

VICEROY IS LINKED TO MORE AS:

- A PERSON WHO HAS LOTS OF STYLE AND FLAIR

670621918

AWARE NON-USER PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A PERSON WHO MAKES FRIENDS EASILY	(133)	(133)	(140)	87	38
A PERSON WITH MAGNETISM	(139)	(121)	(171)	100	100
IN CONTROL OF THE SITUATION	(181)	112	(121)	84	59
TRUSTS OWN INSTINCTS	(136)	103	(126)	66	89
A PERSON WHO SEEMS DIFFICULT TO REACH	(144)	58	44	(184)	(149)
A HIGHLY INTENSE PERSON	(142)	101	83	(169)	(135)
A PERSON WHO HAS LOTS OF STYLE AND FLAIR	(136)	64	75	84	(184)

670621919

IN ADDITION, THE VICEROY USER IS SEEN AS PROUD OF WORK.

NON-USERS PERCEPTION OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A PERSON WHO IS PROUD OF THEIR WORK	(147)	103	91	88	49

670621920

MARLBORO AND WINSTON SHARE:

- A MAN THAT OTHER MEN LIKE
- A PERSON WHO BELIEVES YOU HAVE TO WORK HARD TO MAKE IT

MARLBORO AND MORE INTERACT BY BEING SEEN AS:

- PARTY GOER
- HOT SHOT

TAREYTON AND MORE ARE BOTH:

- WORRY WART

670621921

AWARE NON-USERS PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A MAN OTHER MEN LIKE	94	(153)	(257)	63	54
A PERSON WHO BELIEVES YOU HAVE TO WORK HARD TO MAKE IT	72	(140)	(122)	100	92
A PARTY GOFR	92	127	(162)	94	(141)
A HOT SHOT	106	105	(145)	100	(195)
A WORRY WART	61	85	38	(166)	(154)

670621932

MARLBORO STANDS ALONE IN THAT ITS USER IS SEEN AS:

- A MAN THAT WOMEN FIND EXCITING
- A MACHO TYPE OF PERSON
- A BORN LEADER
- A WINNER
- A PERSON WHO BELIEVES "WHEN IN ROME ... "

REFLECTING ITS MASCULINE FRANCHISE AND ITS BRAND LEADER-SHIP.

670621923

AWARE NON-USERS PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A MAN THAT WOMEN FIND EXCITING	100	100	(312)	116	111
A MACHO TYPE OF PERSON	86	115	(329)	41	119
A BORN LEADER	111	111	(134)	75	84
A WINNER	97	95	(135)	116	54
A PERSON WHO BELIEVES "WHEN IN ROME ..."	89	110	(138)	81	111

670621924

THE MORE NON-USER IMAGERY ILLUSTRATES THE FEMALE NATURE
OF THE BRAND, IN ADDITION TO A SENSE OF "SNORRISHNESS":

- A LIBERATED WOMAN
- A WOMAN THAT MEN FIND EXCITING
- A WALLFLOWER
- AN ORDINARY PERSON WHO BELIEVES HE'S
A CUT ABOVE
- A BIG OPERATOR
- A LONER

670621925

AWARE NON-USER PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A LIBERATED WOMAN	47	36	39	22	(346)
A WOMAN THAT MEN FIND EXCITING	72	41	60	53	(195)
A WALLFLOWER	64	32	31	125	(189)
AN ORDINARY PERSON WHO BELIEVES HE'S A CUT ABOVE	100	84	100	113	(141)
A BIG OPERATOR	105	114	122	103	(146)
A LONER	53	42	101	84	(130)

926129049

TAREYTON'S EXTERNAL IMAGE IS THAT OF:

- A LOSER
- AN IRRITABLE PERSON
- A PERSON WHO BELIEVES IT'S BETTER TO
BE SAFE THAN SORRY

A PORTRAIT THAT DOES NOT SUGGEST A BRIGHT FUTURE
FOR THE BRAND

670624927

AWARE NON-USERS PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A LOSER	92	41	43	(156)	78
AN IRRITABLE PERSON	75	90	51	(150)	70
A PERSON WHO BELIEVES IT'S BETTER TO BE SAFE THAN SORRY	125	67	48	(159)	49

670621928

WINSTON HAS NO SINGULAR BRAND IMAGE
AMONG AWARE NON-USERS. THE BRAND'S
IMAGE STRENGTHS ARE ALSO PROJECTED
BY MARLBORO (OR VICEROY), WITH MARLBORO
PROVIDING A STRONGER REPRESENTATION OF
EACH DIMENSION TO NON-USERS.

670621929

AWARE NON-USERS PERCEPTIONS OF:

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
A PERSON WHO MAKES FRIENDS EASILY	(133)	(133)	(140)	87	38
A PERSON WITH MAGNETISM	(139)	(121)	(171)	100	100
A MAN OTHER MEN LIKE	94	(153)	(257)	63	54
A PERSON WHO BELIEVES YOU HAVE TO WORK HARD TO MAKE IT	72	(140)	(122)	100	92

670621930

PART V - B

BRAND IMAGERY AMONG PRIMARY USERS, SECONDARY USERS AND

AWARE NON-USERS

670621931

VICEROY AND COMPETITIVE BRAND USERS WANT TO IDENTIFY THEIR
BRAND WITH:

- A PERSON WHO MAKES FRIENDS EASILY
- A PERSON WITH MAGNETISM

HOWEVER, ONLY VICEROY, WINSTON AND MARLBORO PROJECT THESE
IMAGE DIMENSIONS EXTERNALLY.

THESE DIMENSIONS SHOULD BE REINFORCED AND STRENGTHENED AMONG
USERS, NON-USERS AND SECONDARY USERS.

670621932

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WHO MAKES FRIENDS EASILY

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	255	273	257	252	198
SECONDARY SMOKERS	42	186	169	168	60
AWARE NON-USERS	133	133	140	87	38

886729029

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WITH MAGNETISM

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	224	138	168	246	197
SECONDARY SMOKERS	132	86	183	-	189
AWARE NON-USERS	139	121	171	100	100

670621934

ONE DIMENSION, BORN LEADER IS REACHED FOR BY VICEROY,
WINSTON AND MARLBORO SMOKERS, AND ONLY MARLBORO
PROJECTS THIS IMAGE TO NON-USERS.

AN ATTEMPT SHOULD BE MADE TO EXTEND THIS IMAGE TO NON-
USERS OF VICEROY.

670621935

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

BORN LEADER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MDRE</u>
PRIMARY SMOKERS	217	196	172	108	103
SECONDARY SMOKERS	129	135	149	100	149
AWARE NON-USERS	111	111	134	75	84

986T29049

VICEROY AND COMPETITIVE BRAND SMOKERS SEEK THE
IMAGE OF BEING IN CONTROL.

VICEROY, AND TO SOME EXTENT, MARLBORO FIT THAT
IMAGE EXTERNALLY.

THIS IMAGE SHOULD BE REINFORCED AS A MEANS OF
ATTRACTING OTHER BRAND SMOKERS, PARTICULARLY
WINSTON.

670621937

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WHO ALWAYS SEEMS TO BE IN

CONTROL OF THE SITUATION

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	276	198	179	150	254
SECONDARY SMOKERS	118	96	162	211	166
AWARE NON-USERS	181	112	121	84	59

670621938

VICEROY'S STRONGHOLD IS THAT ITS USERS AND NON-USERS
SEE THE BRAND AS FOR SOMEONE WHO IS PROUD OF HIS WORK.
THIS IS AN IMAGE THAT USERS OF EACH OF THE BRANDS
REACH FOR, WHILE ONLY VICEROY PROJECTS THAT IMAGE
EXTERNALLY.

670621939

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
PROUD OF WORK

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	180	242	150	269	200
SECONDARY SMOKERS	311	125	141	96	97
AWARE NON-USERS	147	103	91	88	49

670621940

SIMILARLY, VICEROY AND COMPETITIVE BRAND SMOKERS
REACH FOR THE IMAGE OF A PERSON WHO TRUSTS HIS OWN
INSTINCTS.

ONLY VICEROY AND MARLBORO FIT THIS IMAGE EXTERNALLY.

670621941

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
TRUSTS OWN INSTINCTS

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	351	253	183	138	215
SECONDARY SMOKERS	447	136	117	314	183
AWARE NON-USERS	136	103	126	66	89

670621942

EACH OF THE BRAND'S SMOKERS WANT TO SEE THEMSELVES AS A
WINNER - BUT VICEROY AND TAREYTON SMOKERS IDENTIFY WITH
THIS MOST STRONGLY.

VICEROY NEEDS TO EXTEND ITS BRAND IDENTIFICATION AS A
WINNER TO SECONDARY SMOKERS AND AWARE NON-USERS.

670621943

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A WINNER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	441	375	265	510	282
SECONDARY SMOKERS	71	164	182	107	311
AWARE NON-USERS	97	95	135	116	54

670621944

VICEROY, WINSTON, MORE AND MARLBORO PRIMARY
SMOKERS IDENTIFY WITH BEING A PARTYGOER.

VICEROY, HOWEVER, DOES NOT PROJECT THIS IMAGE
TO NON-USERS, WHILE WINSTON, MARLBORO AND MORE
DO.

670621945

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER (GROUP))

A PARTY GOER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	167	162	207	90	136
SECONDARY SMOKERS	-	142	192	289	323
AWARE NON-USERS	92	127	162	94	141

670621946

SMOKERS OF EACH OF THE BRANDS, SEE THEMSELVES AS,
OR WANT TO PROJECT THE IMAGE OF BEING EASY GOING
AND HAVING A GOOD SENSE OF HUMOR.

HOWEVER, NONE OF THESE BRANDS SUCCESSFULLY PROJECTS
THAT IMAGE TO THE OUTSIDE WORLD.

670621947

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
EASY-GOING PERSON

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	170	177	133	192	169
SECONDARY SMOKERS	221	124	93	195	40
AWARE NON-USERS	81	115	83	81	78

670621948

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
 (INDEXED TO BRAND MEDIAM FOR EACH USER GROUP)

GOOD SENSE OF HUMOR

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	186	238	188	233	167
SECONDARY SMOKERS	-	122	114	-	169
AWARE NON-USERS	108	112	97	109	62

670621949

VICEROY'S CONNECTION WITH MORE STEMS FROM THE PERCEPTION OF THESE TWO BRANDS AS STYLISH.

WINSTON AND MARLBORO USERS SEEM TO BE REACHING FOR THIS IMAGE DIMENSION, HOWEVER, NEITHER BRAND PORTRAYS THIS IMAGE EXTERNALLY.

WE BELIEVE THAT STRENGTHENING THIS IMAGE DIMENSION FOR VICEROY AMONG CURRENT WINSTON SMOKERS AND PERHAPS MARLBORO SMOKERS, COULD BE SUCCESSFUL IN CONVERTING THESE USERS TO VICEROY.

670621950

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	211	179	126	98	238
SECONDARY SMOKERS	166	60	69	-	354
AWARE NON-USERS	136	64	75	84	184

670621951

AMONG SECONDARY SMOKERS OF VICEROY, ONE MAJOR APPEAL OF THE BRAND SEEMS TO BE ONE OF SNOBBISHNESS OR SUPERIORITY. SECONDARY USERS SEE VICEROY AS

- . AN ORDINARY PERSON WHO BELIEVES HE'S A CUT ABOVE

- . A BIG OPERATOR

HOWEVER, THESE DIMENSIONS ARE NOT BEING REACHED FOR BY COMPETITIVE BRAND USERS.

FOR THIS REASON, WE SUSPECT THAT THIS IMAGE IS NOT ONE TO BE STRENGTHENED AND THAT PROPER MANAGEMENT OF THE STYLE IMAGE DIMENSION FOR VICEROY MAY REPLACE THIS SNOB APPEAL FOR THE BRAND AMONG SECONDARY USERS.

670621952

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

AN ORDINARY PERSON WHO BELIEVES HE'S A CUT

ABOVE OTHER PEOPLE IN HIS GROUP

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	107	100	66	108	100
SECONDARY SMOKERS	237	112	79	221	300
AWARE NON-USERS	100	84	100	113	141

670621953

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A BIG OPERATOR

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	118	129	84	-	70
SECONDARY SMOKERS	166	133	100	68	151
AWARE NON-USERS	106	114	122	103	146

670621954

VICEROY IMAGERY IS LINKED TO TARETYTON AND MORE BY BEING DIFFICULT TO REACH AND HIGHLY INTENSE, WHICH MAY AGAIN REFLECT THE BRAND'S "SNOBBISH" AURA.

ALTHOUGH VICEROY USERS DON'T REJECT THIS IMAGE, COMPETITIVE BRAND USERS DO. IN ORDER TO GROW THE BRAND, WE BELIEVE THAT THESE IMAGE DIMENSIONS NEED TO BE TEMPERED.

670621955

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WHO SEEMS DIFFICULT TO REACH

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	137	40	42	25	23
SECONDARY SMOKERS	42	42	53	150	86
AWARE NON-USERS	144	58	44	184	149

670621956

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A HIGHLY INTENSE PERSON

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	96	101	66	100	89
SECONDARY SMOKERS	195	113	86	86	57
AWARE NON-USERS	142	101	83	169	135

670621957

VICEROY USERS ARE SEEN AS STREET SMART, AS ARE TAREYTON
AND MARLBORO SMOKERS. HOWEVER, BRAND USERS DO NOT IDENTIFY
WITH THIS CHARACTERISTIC. THIS MAY BE AN IMAGE THE BRAND
MUST OVERCOME IN ORDER TO CREATE NEW USERS.

670621958

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
STREET-SMART

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	103	88	107	-	100
SECONDARY SMOKERS	82	102	144	-	43
AWARE NON-USERS	167	111	126	128	46

670621959

91

WHILE COMPETITIVE BRAND SMOKERS FEEL THEY HAVE TO
WORK HARD TO MAKE IT, VICEROY USERS DO NOT WISH TO
PORTRAY THIS IMAGE - AND THE BRAND IS NOT SEEN THIS
WAY BY NON-USERS.

670621960

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

PERSON WHO BELIEVES YOU HAVE TO WORK HARD TO MAKE IT

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	104	159	115	204	130
SECONDARY SMOKERS	-	158	113	361	-
AWARE NON-USERS	72	140	122	100	92

670621961

FOUR ITEMS ARE STRONG AMONG SECONDARY USERS, BUT
COMPETITIVE BRAND USERS AND PRIMARY VICEROY USERS
DO NOT IDENTIFY WITH THESE DIMENSIONS.

- BORN GAMBLER
- COOL PERSON
- HAVE TO BE LUCKY TO MAKE IT
- NOTHING VENTURED, NOTHING GAINED

THEREFORE, WE DO NOT BELIEVE THEY SHOULD BE REINFORCED.

670621962

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

BORN GAMBLER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	74	96	76	48	94
SECONDARY SMOKERS	166	100	119	-	166
AWARE NON-USERS	119	85	101	66	100

670621963

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A COOL PERSON

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	33	88	101	35	87
SECONDARY SMOKERS	224	55	95	-	200
AWARE NON-USERS	81	47	91	63	89

670621964

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

HAVE TO BE LUCKY TO MAKE IT

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	-	70	45	33	16
SECONDARY SMOKERS	182	52	70	129	63
AWARE NON-USERS	103	85	65	106	49

670621965

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS

(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WHO BELIEVES "NOTHING VENTURED, NOTHING GAINED"

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	114	77	68	273	89
SECONDARY SMOKERS	195	80	57	-	94
AWARE NON-USERS	114	90	68	122	127

670621966

SEX ROLE PERCEPTIONS

VICEROY USERS AND AWARE NON-USERS DO NOT SEE THE BRAND AS HAVING ANY SEX ROLE IMAGERY.

HOWEVER, WHILE VICEROY USERS OUTWARDLY REJECT THE FEMININE IMAGERY, THEY DO NOT REJECT A MASCULINE OR "SEXY" APPEAL.

ON THE OTHER HAND, SECONDARY BRAND USERS SEEM TO BE ATTRACTED TO THE BRAND FOR ITS MACHO IMAGERY.

670621967

THE ABSENCE OF MASCULINE IMAGERY FOR VICEROY MAY HAVE KEPT WINSTON AND MARLBORO USERS OUT OF THE VICEROY FRANCHISE. GIVEN THAT WINSTON AND MARLBORO ARE ROOTED IN THEIR MASCULINE IMAGERY, UPPING THIS PERCEPTION AMONG VICEROY USERS AND NON-USERS SHOULD ALLOW WINSTON AND MARLBORO USERS TO ENTER THE VICEROY FRANCHISE.

AND, GIVEN THAT VICEROY USERS DO NOT REJECT MASCULINE IMAGERY, WHILE THEY REJECT FEMININE IMAGERY, THEY SHOULD NOT BE "TURNED-OFF" BY SOME MASCULINE ASSOCIATION ... BUT NOT MACHO.

670621968

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A MAN OTHER MEN LIKE

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	117	154	207	-	72
SECONDARY SMOKERS	100	204	229	-	29
AWARE NON-USERS	94	153	257	63	54

696129049

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
 (INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A MAN THAT WOMEN FIND EXCITING

	<u>VICERDY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	103	167	256	71	32
SECONDARY SMOKERS	116	137	242	114	326
AWARE NON-USERS	100	100	312	116	111

670621970

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A MACHO TYPE OF PERSON

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	38	115	194	133	64
SECONDARY SMOKERS	316	87	191	186	140
AWARE NON-USERS	86	115	329	41	119

670621971

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A WOMAN THAT OTHER WOMEN LIKE

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	86	95	37	96	103
SECONDARY SMOKERS	47	67	34	-	69
AWARE NON-USERS	44	48	32	40	111

670621972

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
A WOMAN THAT MEN FIND EXCITING

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	100	98	81	48	347
SECONDARY SMOKERS	29	34	38	253	237
AWARE NON-USERS	72	41	60	53	195

670621973

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A LIBERATED WOMAN

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	50	47	49	-	229
SECONDARY SMOKERS	29	59	40	68	469
AWARE NON-USERS	47	36	39	22	346

670621974

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A WALLFLOWER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	50	54	14	-	89
SECONDARY SMOKERS	-	80	42	-	-
AWARE NON-USERS	64	32	31	125	189

670621975

FIVE IMAGE DIMENSIONS THAT NONE OF THE SMOKERS IN VICEROY'S
COMPETITIVE SET IDENTIFY WITH ARE:

- A LOSER
- A LONER
- A PERSON WHO BELIEVES "WHEN IN ROME..."
- A HOT SHOT
- AN IRRITABLE PERSON

ANOTHER TWO DIMENSIONS DO NOT APPLY FOR VICEROY BUT ARE TIED
TO TAREYTON.

- A WORRY WART
- A PERSON WHO BELIEVES IT'S BETTER TO BE SAFE
THAN SORRY

670621976

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A LOSER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	64	22	17	-	8
SECONDARY SMOKERS	-	19	40	114	-
AWARE NON-USERS	92	41	43	156	78

670621972

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)
A LONER

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	86	83	71	60	23
SECONDARY SMOKERS	-	33	57	82	91
AWARE NON-USERS	53	42	101	84	130

670621978

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
 (INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

WHEN IN ROME

	<u>YICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	86	83	101	60	23
SECONDARY SMOKERS	71	58	145	482	106
AWARE NON-USERS	89	110	138	81	111

670621979

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A HOT SHOT

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	108	70	101	-	109
SECONDARY SMOKERS	53	45	123	-	100
AWARE NON-USERS	106	105	145	100	195

670621980

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

AN IRRITABLE PERSON

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	38	60	27	-	36
SECONDARY SMOKERS	129	54	45	218	-
AWARE NON-USERS	75	90	51	150	70

670621981

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS
(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A WORRY WART

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	54	56	31	165	43
SECONDARY SMOKERS	-	43	29	446	-
AWARE NON-USERS	61	85	38	166	154

670621982

BRAND IMAGERY AMONG PRIMARY, SECONDARY, AND AWARE NON-USERS(INDEXED TO BRAND MEDIAN FOR EACH USER GROUP)

A PERSON WHO BELIEVES IT'S BETTER TO BE SAFE THAN SORRY

	<u>VICEROY</u>	<u>WINSTON</u>	<u>MARLBORO</u>	<u>TAREYTON</u>	<u>MORE</u>
PRIMARY SMOKERS	92	135	87	258	138
SECONDARY SMOKERS	-	124	35	96	-
AWARE NON-USERS	125	67	48	159	49

670621983

PART VI

SUMMARY AND ACTION RECOMMENDATIONS

670621984

WE BELIEVE THERE ARE TWO KEY ISSUES FOR PLANNING FOR VICEROY,

- TARGETING

- BRAND IMAGE MANAGEMENT

670621985

TARGETING

WE BELIEVE THE HIGH PRIORITY TARGETS SHOULD BE

. VICEROY SECONDARY USERS

. CURRENT WINSTON SMOKERS

670621986

SECONDARY USERS

VICEROY SECONDARY USERS ARE MORE MALE, MORE BLACK AND WITHIN THE SAME GENERAL AGE SEGMENT (30-39 AND OVER 50) AS THE VICEROY PRIMARY USER.

670621987

VICEROY DEMOGRAPHIC SEGMENTS

	<u>TOTAL CURRENT %</u>	<u>% PRIMARY</u>	<u>% SECONDARY</u>
<u>SEX</u>			
MALES	4.0	1.7	(2.3)
FEMALES	2.8	1.7	1.1
<u>RACE</u>			
WHITES	3.3	1.7	1.6
BLACKS	4.6	1.9	(2.7)
<u>AGE</u>			
21-29	1.9	.7	1.2
30-39	4.4	2.2	(2.2)
40-49	3.3	2.2	1.1
50+	4.8	1.9	(2.9)

670621988

WINSTON USERS

WE BELIEVE THAT THE CURRENT VICEROY BRAND IMAGERY PORTRAYS MUCH OF THE IMAGE SOUGHT BY WINSTON SMOKERS. BY INJECTING A BIT OF MASCULINITY INTO THE VICEROY IMAGE, THE BRAND MAY BE ABLE TO SHEAR OFF SOME WINSTON USERS DISSATISFIED BY THE LACK OF STYLE AND CLASS OF THE WINSTON BRAND.

670621989

IN ORDER TO ATTRACT WINSTON SMOKERS, VICEROY
MUST TARGET TO MALES, WHITES AND BLACKS,
30-39.

670621990

WINSTON PENETRATION AMONG DEMOGRAPHIC SEGMENTS

	<u>TOTAL CURRENT %</u>	<u>% PRIMARY</u>	<u>% SECONDARY</u>
<u>SEX</u>			
MALES	21.9	12.5	9.5
FEMALES	18.1	10.8	7.3
<u>RACE</u>			
WHITES	20.1	11.5	8.6
BLACKS	19.5	13.4	6.1
<u>AGE</u>			
21-29	20.2	9.7	10.5
30-39	23.9	15.5	8.4
40-49	18.7	10.6	8.1
50+	18.2	10.7	7.5

670621991

MANAGING VICEROY BRAND IMAGERY

WE BELIEVE THAT IN ORDER TO MAINTAIN THE VICEROY CURRENT FRANCHISE AND TO GROW THE BRAND:

- . THERE ARE FIVE BASIC IMAGE STRENGTHS TO BE REINFORCED
- . THERE ARE THREE BASIC IMAGE DIMENSIONS TO BE STRENGTHENED
- . THERE ARE THREE BASIC IMAGE NEGATIVES THAT NEED TO BE TEMPERED
- . THERE ARE TWO IMAGE DIMENSIONS THAT NEED TO BE ESTABLISHED

670621992

FIVE BASIC IMAGE STRENGTHS ARE ESTABLISHED
FOR VICEROY AMONG PRIMARY USERS, SECONDARY
USERS, AND NON-USERS, AND ARE APPEALING TO
POTENTIAL USERS.

MAINTAIN AND REINFORCE.

866129029

BASIC VICEROY IMAGE STRENGTHS TO BE REINFORCED

	<u>VICEROY PRIMARY USERS</u>	<u>VICEROY SECONDARY USERS</u>	<u>AWARE NON-USERS</u>
LOTS OF STYLE AND FLAIR	211	166	136
A PERSON WHO IS PROUD OF HIS WORK	180	311	147
A PERSON WITH MAGNETISM	224	132	139
A PERSON WHO ALWAYS SEEMS TO BE IN CONTROL	276	118	181
A PERSON WHO TRUSTS HIS OWN INSTINCTS	351	447	136

670621994

THREE IMAGE DIMENSIONS ARE DEEPLY SEATED AMONG
PRIMARY USERS AND NEED TO BE EXTENDED TO
SECONDARY USERS AND AWARE NON-TRIERS.

670621995

BASIC VICEROY IMAGE STRENGTHS TO BE STRENGTHENED

	<u>VICEROY PRIMARY USERS</u>	<u>VICEROY SECONDARY USERS</u>	<u>AWARE NON-USERS</u>
A WINNER	441	71	97
A PERSON WHO MAKES FRIENDS EASILY	255	42	133
BORN LEADER	217	129	111

670621996

THE FLIP SIDE OF VICEROY'S BRAND IMAGE STRENGTH IS
NON-USER PERCEPTION THAT VICEROY SMOKERS ARE DISTANT
AND THEY CAN'T IDENTIFY WITH THEM.

WE BELIEVE THAT THE IMAGE STRENGTHS NEED TO BE CAREFULLY
REINFORCED BUT THEY ALSO NEED TO BE COMPLEMENTED WITH
IMAGERY THAT MAKES VICEROY SMOKERS MORE HUMAN.

670621997

VICEROY IMAGE DIMENSIONS THAT NEED TO BE TEMPERED

	<u>VICEROY PRIMARY USERS</u>	<u>VICEROY SECONDARY USERS</u>	<u>AWARE NON-USERS</u>
A HIGHLY INTENSE PERSON	96	195	142
A PERSON WHO SEEMS DIFFICULT TO REACH	137	42	144
STREET SMART	103	82	167

670621998

WE BELIEVE THAT IN ORDER TO REACH FOR ADDITIONAL PRIMARY SMOKERS, VICEROY MUST OVERLAY ITS EXISTING BRAND IMAGE STRENGTHS WITH INCREASED MASCULINITY, A SOMEWHAT "SEXY" BUT NOT MACHO KIND OF MASCULINITY.

WE BELIEVE THIS IMAGE EXPANSION WOULD NOT ALIENATE THE BRAND'S CURRENT FRANCHISE.

670621999

IMAGERY DIMENSIONS THAT NEED TO BE ESTABLISHED

	<u>VICEROY PRIMARY USERS</u>	<u>VICEROY SECONDARY USERS</u>	<u>AWARE NON-USERS</u>
A MAN THAT OTHER MEN LIKE	117	100	94
A MAN THAT WOMEN FIND EXCITING	103	116	100

670622000

IN SUM:

1. THE VICEROY TARGET FOR EXPANSION SHOULD BE THE BRAND'S SECONDARY USERS AND CURRENT WINSTON USERS.

THESE SMOKERS ARE MORE LIKELY TO BE MALE THAN THE CURRENT VICEROY FRANCHISE.

2. WE BELIEVE THAT VICEROY SHOULD ATTRACT THIS PRIMARY TARGET, WHILE MAINTAINING THE CURRENT FRANCHISE.

3. IN ORDER TO ATTRACT THIS PRIMARY TARGET

- THIS TARGET GROUP APPEARS TO BE SEEKING THOSE TRAITS THAT VICEROY CURRENTLY REPRESENTS

- PRIDE IN WORK, MAGNETISM, CONTROL, TRUSTS INSTINCTS

THESE CHARACTERISTICS SHOULD BE REINFORCED

- IN ADDITION, THE PRIMARY TARGET SEEKS TRAITS THAT NEED TO BE STRENGTHENED FOR VICEROY:

- WINNER, LEADER, MAKES FRIENDS EASILY

- HOWEVER, THESE IMAGES SHOULD BE CAREFULLY MANAGED TO MINIMIZE THE IMAGERY OF:

- INTENSE PERSON, WHO IS DIFFICULT TO REACH

670622001

- VICEROY'S MAJOR DRAW CARD IS ITS STYLE AND FLAIR - TARGET SMOKERS WANT TO BE SEEN AS STYLISH, BUT THEIR BRANDS DO NOT PROJECT THIS IMAGE EXTERNALLY.
- WE BELIEVE OVERLAYING MASCULINE IMAGERY WILL GIVE WINSTON SMOKERS (AND PERHAPS MARLBORO SMOKERS) PERMISSION TO MOVE INTO THE VICEROY FRANCHISE.

670622002