

11/3/82
6-16-82

John Morton Company

A BRAND IMAGE STUDY OF THE
CIGARETTE INDUSTRY

PHASE I

ATTRIBUTE DEVELOPMENT
AND
SELECTION

BROWN & WILLIAMSON
TOBACCO CORPORATION

DECEMBER 16, 1982

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MADE IN GREAT BRITAIN BY THE BROWN & WILLIAMSON TOBACCO COMPANY

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GOALS AND OBJECTIVES

- TO DEVELOP A UNIVERSAL SET OF ATTRIBUTES, BOTH PRODUCT AND SMOKER, THAT CAN DEFINE, DESCRIBE AND DISCRIMINATE BETWEEN IMAGES OF CIGARETTES, BRAND FAMILIES AND BRAND STYLES.
- TO SELECT A SUBSET OF ATTRIBUTES THAT DISTINGUISHES MOST CLEARLY AMONG EXISTING PRODUCTS AND THAT MOST DISTINCTLY DEFINES INDIVIDUAL PRODUCTS, ESPECIALLY BROWN & WILLIAMSON'S. BOTH PRODUCT AND SMOKER ATTRIBUTES MUST BE INCLUDED.

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METHODOLOGICAL SUMMARY

QUALITATIVE PHASE

- MERGING OF ALL CURRENTLY AVAILABLE STUDIES
 - 1970 TRADE-OFF STUDY
 - 1976 IMAGE STUDY
 - 1982 IMAGE STUDY
 - GERMAN STUDY
- GENERATION OF NEW ATTRIBUTES VIA GROUP AND ONE-ON-ONE INTERVIEWS

QUANTITATIVE PHASE

- FIELD STUDY OF 1000 MODERATE TO HEAVY SMOKERS
- BRAND IMAGES WERE DESCRIBED USING LARGE NUMBER OF CANDIDATE ATTRIBUTES
- NUMERICAL ANALYSIS OF ATTRIBUTES
 - DIFFERENTIATION BY PREFERENCE
 - DIFFERENTIATION BY FAMILY
 - DIFFERENTIATION BY STYLE
 - RATINGS OF BROWN & WILLIAMSON BRANDS
 - CORRELATIONS AMONG ATTRIBUTES
(SUMMARIZED AS FACTOR ANALYSIS)

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PERSONAL INTERVIEWS

• 2 GROUP INTERVIEWS

- MODERATED BY GEORGIA BENDER
- AVERAGE OF 9 SMOKERS PER GROUP
- ONE GROUP MALE, ONE FEMALE
- DURATION: 2 HOURS

• 20 ONE-ON-ONE INTERVIEWS

- MODERATED BY GEORGIA BENDER RESEARCH STAFF
- INTERVIEWS SPLIT HALF MALE - HALF FEMALE
- DURATION: 1 HOUR

• RESPONDENT SELECTION CRITERIA

- 21-45 YEARS OF AGE
- SMOKES AT LEAST 3½ PACKS PER WEEK
- MINORITY REPRESENTATION
- DEMONSTRATES UNAIDED RECALL OF 7 OR MORE BRANDS
- SMOKES MULTIPLE BRANDS OR HAS SWITCHED
- DEMONSTRATES CREATIVITY, SPONTANEITY, AND SPEED

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- INTERVIEW TECHNIQUE
 - WORD ASSOCIATIONS WITH BRAND NAMES
 - SMOKER DESCRIPTIONS
 - FAMOUS PERSONALITY - CIGARETTE ASSOCIATIONS
 - ALTERNATE PRODUCT - CIGARETTE ASSOCIATIONS

- ALL RESPONDENTS CHOSEN FROM CHICAGO METROPOLITAN AREA

- RESULTS
 - LIST OF WORDS AND PHRASES
 - BRIEF BRAND FAMILY PROFILE

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FIELD INTERVIEWS

● SAMPLE DESIGN

- 1000 RESPONDENTS
- 8 CITIES
 - MILWAUKEE ST. LOUIS
 - MEMPHIS ALBUQUERQUE
 - SEATTLE PHILADELPHIA
 - TAMPA TULSA
- CENTRAL MALL LOCATIONS

● RESPONDENT SELECTION CRITERIA

- DEMOGRAPHIC DISTRIBUTION
 - MALE 21-34 27%
 - MALE 35+ 23%
 - FEMALE 21-34 24%
 - FEMALE 35+ 26%
- SMOKED 4 OR MORE PACKS PER WEEK
- MUST SMOKE ONE OF 24 BASE BRAND FAMILIES
- MUST NOT WORK FOR MARKET RESEARCH FIRM,
NOR TOBACCO COMPANY

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FIELD INTERVIEWS
(CONTINUED)

• QUESTIONNAIRE DESIGN

- 5 BRANDS SELECTED BY RESPONDENT

PRIMARY BRAND - MOST SMOKED PACK

PRIMARY BRAND - LEAST LIKED PACK

LEAST FAVORITE BRAND

PREVIOUS SWITCHED BRAND OR SECOND PREFERENCE

MOST DIFFERENT FROM PRIMARY BRAND

- 20 RANDOM ATTRIBUTES

EACH QUESTIONNAIRE FOR EACH OF THE 5
BRANDS INDEPENDENTLY COMPUTER GENERATED
TO INSURE UNIFORM RANDOM DISTRIBUTION
OF ALL ATTRIBUTES

• TOTAL SAMPLE CREATED

- 100,000 TOTAL RESPONSES
- ACROSS 24 FAMILIES X 262 ATTRIBUTES
- ACROSS 131 STYLES X 262 ATTRIBUTES

AVERAGE RATINGS PER STYLE = 3

AVERAGE RATINGS PER FAMILY = 16

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DATA REDUCTION
PHASE I

METHOD

- CALCULATION OF DEGREE OF DISCRIMINATION (MEASURED BY F RATIO) ACROSS
 - FAMILY (BASED ON 24 AGGREGATE BRAND FAMILIES)
 - STYLE (BASED ON INTRA-FAMILY DIFFERENCES)
 - PREFERENCE (BASED ON 5 BRAND SELECTIONS FOR EACH RESPONDENT)
- CALCULATION OF ATTRIBUTE VARIANCE FROM MEAN BY BRAND

SELECTION CRITERIA

- SELECTION OF THOSE ATTRIBUTES THAT GAVE HIGHEST DISCRIMINATION ON ALL 3 CATEGORIES INDEPENDENTLY
- SELECTION OF RATINGS OF BROWN AND WILLIAMSON BRANDS

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DATA REDUCTION
PHASE I
(CONTINUED)

RESULTS

• REDUCTION OF DATA TO 103 ATTRIBUTES

34 PRODUCT
69 SMOKER
8 B & W BRAND RATING

• F RATIO CUTOFFS

DISCRIMINATORS	F RATIO	TOTAL
PREFERENCE	11.0	37
FAMILY	1.8	62
STYLE	1.4	38

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FINAL ATTRIBUTES

TOP TEN DIFFERENTIATOR
P F S

PRODUCT

1	IS REFRESHING			
2	HAS HIGH TAR LEVEL		*	
25	IS FULL FLAVORED	*	*	
26	IS SMOOTH TASTING	*	*	
27	IS HARSH TASTING		*	
39	HAS NO AFTERTASTE			
51	IS SATISFYING	*		
60	IS GOOD TASTING	*		
66	IS RICH TASTING	*		
82	HAS HIGH QUALITY TOBACCO			
96	IS ONE I WOULD BE PROUD TO SMOKE	*		
98	IS FIRMLY PACKED			

SMOKER

3	HAS DRY MOUTH			
6	IS SECURE			
12	IS LAZY			
21	IS ELEGANT			
23	IS PROPER			
24	IS PLEASANT	*		
34	IS A WINNER			
37	IS RUGGED			
40	IS DELICATE			
44	IS A LEADER			

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FINAL ATTRIBUTES
(CONTINUED)

	TOP TEN DIFFERENTIATOR		
	P	F	S
SMOKER (CONTINUED)			
47 IS A CONSIDERATE SMOKER			
56 IS POPULAR			
59 IS FASHIONABLE			
61 IS OLD FASHIONED		*	*
64 IS FOR OLDER PEOPLE			
65 IS SEXY			
68 IS MASCULINE		*	*
79 IS A CONSIDERATE SMOKER			
80 IS FOR A PERSON WHO WISHES NOT TO SMOKE			
83 IS ENJOYABLE	*		
84 IS RELAXED			
89 IS BLAND			
97 IS FOR BLACK PEOPLE			
99 IS DISCIPLINED			
103 IS FOR SOMEONE LIKE ME	*		

SOURCE BREAKDOWN

FOCUS GROUPS/ONE-ON-ONE	5
B&W MARKET RESEARCH	12
PREVIOUS STUDIES	18
BRAND MANAGEMENT	<u>2</u>
	37

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RESULTS

TOTAL ATTRIBUTE LIST = 262 (MERGED PAST STUDIES AND
GROUP AND ONE-ON-ONE LIST)

TOTAL PRODUCT ATTRIBUTES = 48

TOTAL SMOKER ATTRIBUTES = 214

TOTAL "NEW" ATTRIBUTES = 44

TOTAL FROM MERGED LISTS	271
TOTAL FROM PERSONAL INTERVIEWS	130
DUPLICATES	86

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First, unlike work +

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MAIN STUDY

- 1800 MICROCOMPUTER INTERVIEWS (IN 20 SAMPLING AREAS)
 - 900 WITH B & W SMOKERS; 50 IN EACH OF 18 MAJOR STYLES
 - 900 WITH COMPETITIVE SMOKERS; 50 IN EACH OF 18 MAJOR FAMILIES

- DURING INTERVIEW, EACH SMOKER:
 - RATES CUSTOM-DESIGNED SET OF 10 BRAND STYLES ON EACH ATTRIBUTE
 - RANK-ORDERS THE 10 BY PREFERENCE
 - INDICATES ("CLAIMED") IMPORTANCE FOR EACH ATTRIBUTE
 - ANSWERS CLASSIFICATION QUESTIONS

- PRIMARY ANALYTIC TECHNIQUES
 - PERCEPTUAL MAPPING, BASED ON ATTRIBUTE RATING INFORMATION
 - CONTOUR MAPPING TO INDICATE DENSITY OF DEMAND

- TIMING
 - INTERVIEWING JAN. 5 - FEB. 4
 - TOPLINE RESULTS MAR. 4
 - FINAL PRESENTATION MAR. 31

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DATA REDUCTION
PHASE II
FINAL ATTRIBUTE SELECTION

PROCEDURE FOR FINAL SELECTION FROM LIST OF 103 AS FOLLOWS:

- FACTOR ANALYSIS RUN ON SET OF 103
 - ACCOUNTED FOR 80% OF THE VARIANCE
 - USED 10 FACTORS
- HIGHEST "+" LOADING AND "-" LOADING ATTRIBUTES SELECTED ON EACH FACTOR
- BEST PRODUCT AND BEST SMOKER SELECTED FROM EACH
 - SELECTION BASED ON
BEST DISCRIMINATORS
HIGHEST CORRELATIONS
- FINAL REDUCTIONS DONE BY REMOVING VERY HIGHLY CORRELATED PAIRS (+ AND -)
- B & W BRAND RATING ATTRIBUTES FORCED ON FINAL LIST

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FIRST FACTOR

Attribute	Loading	Qualifying Screens
30 Is a new brand	.69	F S
81 Is a light smoker	.68	F
33 Is very easy on throat	.63	S
80 Is for a person who wishes not to smoke	.57	F S
79 Is a considerate smoker	.57	BW
92 Is dainty	.57	F S
91 Is innocent	.50	F
75 Is rustic	-.52	F S
9 Is thick	-.52	F
37 Is rugged	-.57	F
87 Is stormy	-.58	F
82 Has high quality tobacco	-.60	P F
61 Is old-fashioned	-.60	F S
50 Has full bodied flavor	-.67	P S
68 Is masculine	-.68	F S
36 Is tough	-.70	F
20 Has strong tobacco taste	-.75	P F
100 Produces a lot of smoke	-.76	F
2 Has high tar level	-.80	F S
5 Has high nicotine level	-.85	F S
31 Is an old brand	-.85	F S

P - Preferences F - Family S - Style BW - B & W Brand Specific

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SECOND FACTOR

Attribute	Loading	Qualifying Screens
13 Is exciting	.83	P
44 Is a leader	.80	P
78 Is cool	.74	F
54 Is clean cut	.73	F
59 Gives a filling sensation	.59	P F S
49 Is clever	.57	F S
73 Is the center of attention	.54	S
14 Is interesting	.54	P
29 Is superior	.50	P
45 Is genuine	.46	P
9 Is stable	-.49	P
83 Is enjoyable	-.51	P F S
32 Irritates mouth	-.78	P F

P - Preference F - Family S - Style BW - B & W Brand Specific

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THIRD FACTOR

Attribute	Loading	Qualifying Screens
64 Is for older people	.76	F
28 Is cheap	.75	F
57 Is unpopular	.63	F
80 Is for a person who wishes not to smoke	.53	F S
16 Often has cents off coupons	.48	F S
61 Is old-fashioned	.46	F S
53 Is ambitious	.42	F
18 Has style	-.58	F
98 Is one I would be proud to smoke	-.60	P S
96 Is casual	-.61	S
93 Is luxurious	-.62	F
85 Is well made	-.69	P
85 Is sexy	-.71	F
19 Has flair	-.74	P
70 Is medicinal tasting	-.75	S

P - Preference F - Family S - Style BW - B & W Brand Specific

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FOURTH FACTOR

Attribute	Loading	Qualifying Screens
71 Is fresh	.72	F
60 Is good tasting	.65	P F S
82 Has high quality tobacco	.63	P F
77 Is natural tasting	.63	P F S
12 Is lazy	-.69	F

P - Preference F - Family S - Style BW - B & W Brand Specific

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FIFTH FACTOR

Attribute	Loading	Qualifying Screens		
		P	F	S
1 Is refreshing	.89	P	F	S
21 Is elegant	.72		F	
95 Is for white people	.63		F	
39 Has no aftertaste	.55			BW
3 Has dry wit	.54			BW
30 Has pleasant aftertaste	.50	P		
23 Is proper	.48		F	
89 Is bland	.47			BW
72 Is a joiner	.46		F	
90 Is bubbly	.46		F	
101 Has smoke that is irritating to others	-.60		F	
102 Causes discomfort	-.73	P	F	

P - Preference F - Family S - Style BW - B & W Brand Specific

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SIXTH FACTOR

Attribute	Loading	Qualifying Screens
89 Is macho	.80	F
37 Is rugged	.68	F
4 Likes a good belly laugh	.61	F
35 Is pushy	.59	F
26 Is smooth tasting	.46	P F S
83 Is enjoyable	-.58	P F S
11 Keeps track of details	-.60	F
47 Is slow	-.66	BW
61 Is satisfying	-.66	P
15 Is sporty	-.68	P
56 Is popular	-.81	P

P - Preference F - Family S - Style BW - B & W Brand Specific

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SEVENTH FACTOR

Attribute	Loading	Qualifying Screens
59 Is fashionable	.85	F S
88 Is for average person	.71	P
84 Is relaxed	.66	P
91 Is an attractive cigarette	.49	F
27 Is harsh tasting	-.39	P F S
3 Has dry wit	-.40	BW
98 Is firmly packed	-.41	BW
36 Is tough	-.42	F
61 Is old-fashioned	-.42	F S
47 Is slow	-.42	BW
57 Is unpopular	-.49	F

P - Preference F - Family S - Style BW - B & W Brand Specific

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EIGHTH FACTOR

Attribute	Loading	Qualifying Screens
43 Is sweet tasting	.67	S
23 Is proper	.83	F
22 Is dignified	.62	S
94 Is international	.51	F
46 Is biting	-.62	F S
97 Is for black people	-.67	BW

P - Preference F - Family S - Style BW - B & W Brand Preference

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NINTH FACTOR

Attribute	Loading	Qualifying Screens
34 Is a winner	.82	P
99 Is disciplined	.77	BW
42 Is street smart	.74	F
17 Is suave	.72	F S
7 Is content	.66	P
10 Is neat	.63	S
98 Is firmly packed	.61	BW
24 Is pleasant	.60	P F S
40 Is delicate	.57	F
49 Is clever	.51	F S
76 Is good	.49	P S
91 Is an attractive cigarette	.46	F
11 Keeps track of details	.46	F
66 Is rich tasting	.44	P S
62 Is relaxing	.41	P

P - Preference F - Family S - Style BW - B & W Brand Specific

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TENTH FACTOR

Attribute	Loading	Qualifying Screens
67 Is feminine	.67	F
6 Is secure	.50	P
55 Is chic	.49	F S
63 Is for younger people	.44	S
25 Is full flavored	-.50	P F
103 Is for someone like me	-.53	P
48 Is spicy tasting	-.54	F S
74 Is a nature lover	-.69	S
62 Is bad tasting	-.70	P

P - Preference F - Family S - Style BW - B & W Brand Specific

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