Qualitative Research into the UK Potential for Marlboro Medium

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Presented to:
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Research Objectives

Overall, assess potential of Marlboro Medium in UK Market

- Ability to attract competitor smokers into the ‘house’
- Potential effect on existing variants
  - usage
  - brand imagery

Specifically

- Current variant imagery vs competitors
- Role of brand with a ‘medium’ positioning
- Importance of T & N numbers
- Assess where trialists/switchers are likely to come from
- Examine reactions to pack
Sample

7 x Group Discussions
All regular smokers (at least 10 cigarettes per day)
All outgoing, style conscious, sociable

- 3 x Marlboro Smokers
  - male - 18-22 (students)
  - male - 25-34
  - female - 20-25

- 4 x Premium Brand Smokers
  - female - 18-22 (students)
  - female - 25-34
  - male - 20-25
  - male - 25-34
Respondents Lifestyles/Interests

**Spectrum**

**Adventurers**
- Very style conscious
- Educated
- Arts/style interests
  - reading (looks, style mag.)
  - design
  - music/bands
  - non mainstream clubs
  - more esoteric films
- Participants
- Involved in ‘culture’
- Socially active during week & weekend

**Conformists**
- Less style conscious
- Mainstream interests
  - pub, wine bar
  - local disco
  - tv/video
  - sports
  - Blockbuster releases
- Less involved in ‘cultural’ pursuits
- Men - sports orientation (esp. football)
- Women - children focus
- Socially active - weekends only

**Majority**
- Students (male/female)
- Marlboro smokers (majority)
- Younger Premium smokers (esp. occasional Marlboro smokers under 30)
  - also
- Camel Smokers
- (Occasional Gauloise)

**Minority**
- Older Premium loyalists
  - ie. Dedicated B&H, Embassy smokers - 30 plus, male and female
- Some (minority) Older Marlboro
- Some (minority) Female Marlboro
Respondents Lifestyles/Interests

### Adventurers

**Film repertoires** include
- Foreign (European) Films
- Greenaway
- Tarantino

**Magazines**
- The Face
- ID
- NME
- The Big Issue
- Marie Claire
- Loaded
- GQ
- Sports Magazines
- Music Press

**Director literate/oriented**

### Conformists

**Film repertoires**
- American blockbusters
- Comedy, action, thriller

**Actor/Actress orientated**

**Magazines**
- Marie Claire
- Elle
- Cosmopolitan
- Hello
- Sports Magazines
Advertising Recall

Television

- Guinness
- Levis
- John Smith’s
- Worthingtons
- Bacardi
- Strongbow
- McDonalds

Plus

Female - Dance
Male - Spacewoman
- Penguins/Jack Dee
- Harry Enfield
- Radio station
- Snake
- Facts of life
- Diet Coke (coffee break)
- Holsten Pils (Asshole)

Visual impact/distinctiveness - clever vs sexy vs controversial
Humour - offbeat, irreverent, ‘piss takes’
Music - catchy, memorable

Billboard/Press

- Sorted (esp. under 25 male)
- Smirnoff
- Silk Cut (campaign)
- Benson & Hedges (crossword)
- Marlboro (Red on B&W, Cowboy)
- Regal (Reg)
- Royals
- Hamlet (Julian Clary)
- Benson & Hedges (Gold)
Smoker Need States

**Badging - reflecting my identity**
- Conforming/feeling reassured
- Expressing individuality/discernment

**Habit**
- Familiarity, auto-pilot

**Accessible taste/flavour**
- Familiar, edgy

**Challenging Taste/Flavour**
- ‘real’ cigarettes - maturity, discernment, ‘individuality’ expressions

**Cutting Down Amount**
- Trial of less ‘enjoyable’ cigarettes

**Budget**
- Trial of cheaper cigarettes

**Alternative Uses**
- Eg. skinning up (tobacco suitability)

**Societal or Peer**
- Conforming/feeling reassured
- Expressing individuality/discernment

**Conformity/ Sociability**
- Desire for a change
- Desire for stimulation

**Experimentation**
- Desire for a change
- Desire for stimulation

**Health/Throat Concerns**
- Colds
- Sore throats
- General health

**Suitable Strength**
- Familiar
- Balanced ie. taste, hit delivery

**Personality** of the individual and the combination of Need States or circumstances emphasising a particular Need State, will dictate Cigarette Repertories in terms of:
- Size of Repertoire
- Favoured brands (and extent of loyalty to brands)
- Occasional brands (and extent of switching)

**Also**
- Permanent brand switches
Smoker Need States

**Smoker Behaviour**

**Narrow Repertoire**
ie. Brand loyalty restricted to one brand

- Marlboro Smokers
  (Reds, Lights)
- Older Premium
  (esp. Camel)

**Broader Repertoire**
ie. Brand loyalty encompasses 2 or more brands

- Premium Smokers
  (under 30)

### Marlboro Smokers
- Badging (choice statement of self-expression/identity)
- Taste/flavour/strength suitability
- Habit (but occ. forays into other brands triggered by colds/lack of availability)

### Older Premium
- Habit
- Taste/flavour/strength suitability
- Badging (conforming/feeling reassured)

### Premium Smokers (under 30)
- Badging concerns (too conformist, not self expressive)
- Experimentation (esp true for B&H smokers, less true for Embassy smokers)
  - Also
  - Health Concern
  - Also
  - Peer Conformity
Typical Narrow Repertoire vs Broader Repertoire

Marlboro Reds

Marlboro Lights
Heavy night/sore throat

Rothmans (Available)

Narrow Repertoire

only lasts the evening/the day

NB. for Marlboro Light smokers and some Marlboro Reds, Silk Cut can also be selected to meet sore throat need

Benson & Hedges

Marlboro Lights
- Lower tar with taste/hit
- Popular
- Being different
  - Regular, occasional choice
  - Feel affinity with brand

Broader Repertoire

Embassy (Available)
Smoking Repertoires

Marlboro

- Male students - 3 Reds/4 Lights
  - reasonably loyal
- Male 25-34 - 4 Reds/3 Lights
  - reasonably loyal
- Female 20-25 - All lights
  - some loyal
  - some repertoire
  (also smoking B&H/Embassy etc.)

Premium

- Female 25-34 - B&H/Embassy/Regal Mix/reertoire
  (also Rothmans, Marlboro Lights, Berkeleys, JPS occasionally)
- Male 20-25 - B&H/Embassy loyalists
  (4 x Marlboro Lights occasional)
- Male 25-34 - B&H/Embassy loyalists
  vs
  Camel predisposition (occ. Gauloise, Craven A, Roll-ups)
- Female students - B&H/Embassy loyalists
  (1 x Marlboro Red occasional)
  (3 x Marlboro Light occasional)
# Market Mapping Dynamics

## Key Factors Influencing Mappings

<table>
<thead>
<tr>
<th>Factor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Flavour</strong></td>
<td>Distinctive flavour <em>vs</em> accessible (acceptable) flavour</td>
</tr>
<tr>
<td><strong>Strength</strong></td>
<td>Strong (<em>vs</em> medium) <em>vs</em> light/mild</td>
</tr>
<tr>
<td><strong>Popularity/Presence</strong></td>
<td>High availability/presence <em>vs</em> not always available/seen</td>
</tr>
<tr>
<td><strong>Origins</strong></td>
<td>'Foreign' (<em>vs</em> International) <em>vs</em> 'British'</td>
</tr>
<tr>
<td><strong>Imagery</strong></td>
<td>Upmarket <em>↔</em> Downmarket</td>
</tr>
<tr>
<td><strong>Price</strong></td>
<td>Premium <em>vs</em> cheap</td>
</tr>
</tbody>
</table>
Younger (some 'American' plus Camel smokers, Foreign 'British' dynamic (i.e. state-conventional brands))

Thus

Marlboros, Camels, Lucky Strikes (Chesterfields) all initially pushed together

Strength and image factors then come into play
Market Mapping Dynamics

- Younger *Premium* groups and some older male Marlboro smokers initially driven by Flavour/strength dynamic

**Thus**

Marlboro Reds, Camel Filter, Camels, *Rothmans*, (Lucky Strikes, Chesterfields) grouped together

Popularity and image factors then come into play

- Older *Premium* groups (esp. women) initially driven by popularity/presence dynamic

**Thus**

B&H, Embassy, Rothmans, *Silk Cut*, Regal (Marlboro Lights) grouped together

Flavour & Strength then come into play
Do initial drivers indicate rationale (conscious or sub-conscious) for brand choices

**Marlboro/Camel**  - Overt badging?

**Younger Premium**  - Suitable flavour/strength

**Older Premium**  - Habit generated by conformity to ‘leading’/ popular brands?
Given key factors influencing mapping, typical map reflects the following:

- **Foreign/American** (International) grouping (mirrored by ‘strong’ brands)
- ‘**British**’ group
  - divided into ‘posh’, ‘middle of the road’, ‘cheap’ (mirrored by strength and popularity factors)
- **Lights** group
  - (divided into stronger and weaker mirroring Foreign vs British dynamic)

**NB.** cigarettes falling into these groups can occasionally vary according to degree of familiarity/salience with brand and perceived brand image.
Typical Market Mapping

Strength/Flavour

Strong (distinctive) flavour

Strong

Rotmans

Lucky Strike
Chesterfield

Camel
Camel Filters
Marlboro Reds

L.S Lights

Camel Lights
Camel Mild

Marlboro Lights

Medium (normal/average)

Camel Lights
L.S. Lights
Marl Lights

Weak

Silk Cut, Embassy Rich, Royal Lights, Camel Mild?

Imagery

American/Foreign (International)

Obscure

British

Popular/middle of the road

‘Posh’ (older)

Cheap (older)

FEMALE

MALE
How Strength is Determined

**Received Impressions**
- Experience (self, others)
- Smell of smoke
- (Advertising)

**ESSENTIALLY REPUTATION**

And
Existence of a Range
(expect new brands to be lighter than main brand)

**Pack Description**
- Low tar announcement (general)
- Mild, light descriptor
- Extra low/mild etc.

Reinforced by pack colours - establishment of colour code
- white
- light blue
- gold
- Type of Tobacco

NB. Tar levels themselves are rarely if ever looked for to determine or establish strength
(Except minority - women)
Ignorant as to tar levels of brands being smoked
Brand Imagery for Key Brands

**Salience**
- Emotional Closeness to brand

**Brand Personality**
- Brand character and personification
- Personality traits

**Product Imagery**
- Perceived pack and product characteristics

**User & ‘Venue’ Imagery**
- Typical users
- Typical places brand perceived to be seen
Brand Imagery for Key Brands

Marlboro Reds

Salience

*Marlboro Reds* - Very close
*Marlboro Lights* - Fairly close (strength & image? = distancing)
*Came*l - Fairly close (product only)
*Other premium* - Distanced (strength and image = distancing)

Product Imagery

- Pack - Red
  - strong, aggressive
  - American/Americana
  - (KKK)
- Product
  - strong
  - distinctive flavours (chemical?)
  - distinctive smell
# Brand Imagery for Key Brands

## Marlboro Reds

### Brand Personality

- “Rough and Ready”
- ‘Cool’
- Confident, self-assured
- Laid back, casual
- Easy going, carefree
- Free spirited
- Tough
- Strong willed/determined
- Adventurous
- Independent, self-sufficient
- (knowledgeable)

### User Imagery

- Male
- Students vs ‘Mature’ Men (30/40+)
- Image conscious
- Individualists
- Arty/Music crowd (esp. musicians/ravers)
- Bikers/Racers
- Well Travelled
  - Europe
  - States
  - Foreigners

### Venue Imagery

- **Abroad** (general)
- University bars
- Town pubs - live music
- (Wine bar)

### AMERICANS

- James Dean - Iconoclastic
- Cowboys/John Wayne
- Tom Selleck
- Stacey Keach
- Micky Rourke
- Jack Nicholson
Brand Imagery for Key Brands

Marlboro Reds

Key Analogies

Drinks
- Budweiser
- Becks
- Popular, credible
- Bottled largers
- Jack Daniels
- Smirnoff (Red)

Cars/Magazines
- NME
- Biker Magazines
- Loaded
- old Cadillac

Places
- Dallas
- Nashville
- New York (outside Manhattan)

America
- ‘Cool’
- Tough
- Male
- Free, Independent
## Brand Imagery for Key Brands

### Response to Marlboro Red Imagery

<table>
<thead>
<tr>
<th>Identification</th>
<th>Aspirational</th>
<th>Distancing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personality/ User Imagery</strong></td>
<td><strong>Personality/ User Imagery</strong></td>
<td><strong>Personality/ User Imagery</strong></td>
</tr>
<tr>
<td><em>Marlboro Red Smokers/occasional smokers</em></td>
<td><em>Some Marlboro Lights/Some Young Premiums (esp. males)</em></td>
<td><em>Other Marlboro Lights/Other Premiums (esp. females)</em></td>
</tr>
</tbody>
</table>

### Identification
- **Personality/ User Imagery**
  - *Mature/Masculine*
    - Independent
    - Confident (tough)
    - Casual
    - Discerning
    - Knowledgeable
    - Interested in life (e.g., art, music)
  - **'me'**
  - **Plus**
    - Full Flavored, tasty cigarette

### Aspirational
- **Personality/ User Imagery**
  - But a little too:
    - Macho, cool, obvious
    - Overtly American
    - Too strong, harsh, hard on the throat
    - (strong smell)
  - Also

### Distancing
- **Personality/ User Imagery**
  - Pretentious
  - Poseurs
  - Arty
  - Overgrown/perpetual students
  - Trying to be hard/macho
  - Scruffy, unkempt
  - UNCARING
  - Self centred
  - (self image obsessed)
  - (create revolting smell)
  - Also product too harsh/KKK image distancing
Brand Imagery For Key Brands

### Marlboro Lights

#### Salience
- **Marlboro Lights** - very close
- **Younger premium** - fairly close
- **Marlboro Reds** - fairly distanced
- **Older premium** - distanced

#### Brand Personality
- Self-assured
- Confident
- Outgoing
- Sociable
- Fun loving (with style, panache)
- Easy-going
- Sensible/smart
- Sophisticated
- 'Modern' values
- Professional
- European woman - stylish
- Madonna
- Michele Pfeiffer
- Annette Benning
- Nicole Kidman

#### User Imagery
- Female (16-30)
- Students vs sophisticated women - young, stylish - executives
- Style conscious/ **trendy**
- Social, outgoing
- Wine bar crowd
- Travelled (Europe)
- Up-to-date/in-touch
- (Male -14-25) - fashion conscious - arty/designery

#### Venue Imagery
- University bars
- Wine bars
- Smart cafe
- (Town pubs)
- (Abroad)

#### Product Imagery
- Pack - gold, white
  - stylish, sophisticated, smart (vs poncey)
- Product - lower tar but flavour, taste, 'kick'
Brand Imagery For Key Brands

Marlboro Lights

Drinks
- Iced beers (eg. Fosters Ice)
- Hooch
- Smirnoff Mule
- Gordons Gin
- Budweiser

Cars/Magazines
- NME
- GQ
- Arena
- ID

Places
- Paris
- Milan
- San Francisco

- Stylish
- Contemporary
- Youthful
- Fashionable
  vs
- (Faddish!?)
- (Effete)
- (Self conscious)
Brand Imagery For Key Brands

Response to Marlboro Lights imagery

Marlboro Lights/
Some younger
premums (esp.
oc. MLs)

Identification/
aspirational

- Youthful
- Outgoing
- Sociable
- Contemporary
- Sophisticated
- Cosmopolitan
- Modern
- Reflects me/
  my values
- Light with
  flavour ✔✔✔

Some Marlboro Redsin

Resistance but
some identification

- Feminine
  but
  - Smart
  - Cosmopolitan
  - Dynamic
  
- Good ‘light’
  alternative
- Still get
  Marlboro taste
  ✔✔✔

Older premiums (esp.
  female)
Older Marlboro Reds
Some younger
premums (esp.
Embassy)

Distancing

- Males:
  - not me
  ↓
  - ‘for women -
    (albeit attractive,
    admirable)
- Females
  - pretentious
  - snobby
  - trying too hard
to be trendy
  vs
  - teenagers
    (older women)
- Still get
  Marlboro taste/
  smell XXX
Brand Imagery For Key Brands

Camel

**Salience**
- Distanced for majority
- Fairly close - some Marlboro smokers
- Very close - Camel smokers

**Brand Personality**
- Eccentric
- Wayward
- Loner, detached
- Aloof, unsociable
- Outgoing
- Adventurous
- Assertive
- Determined
- Explorer
- Adventurer
- Safari suit
- Down and out, being actor
  - tobacco stained teeth, fingers
- Yul Brynner
- Peter O'Toole

**User Imagery**
- American/foreigners
- Arts students
- Hardened smokers
- Rough/uncouth types
- Eccentrics (esp. old men)

**Venue Imagery**
- Abroad
- (Wine bar)
- (University bars)

**Product Imagery**
- Eccentric, foreign pack
- Harsh, toasted tobacco
- Repellent smell (esp. Premium) camel shit
# Brand Imagery For Key Brands

**Camel**

<table>
<thead>
<tr>
<th>Drinks</th>
<th>Cars/Magazines</th>
<th>Places</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Whisky</td>
<td>- Loaded</td>
<td>- Berlin</td>
</tr>
<tr>
<td>- Two-Dogs</td>
<td>- Viz</td>
<td>- Sydney</td>
</tr>
<tr>
<td>- Budvar</td>
<td></td>
<td>- (New York)</td>
</tr>
<tr>
<td>- Guinness</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Male
- Challenging
- Alternative
- Different

**NB:** All Camel brands receive same imagery dimensions
- Lights/Mild perceived as slightly younger version of the same ‘character’
Brand Imagery For Key Brands

Response to Camel brand imagery

Majority

- Reject as too eccentric, unconventional

NB:
Marlboro smokers (esp. Marlboro Lights) push brand into an ‘eccentric/artsy/studenty position (which is seen as too overt a statement of individuality), in the same way as a number of premium smokers (esp. older) push Marlboro into this territory

Minority (some Marlboro plus Camel smokers)

Find brand image appealing:
- unconventional
- individualistic
- masculine, hard
# Brand Imagery For Key Brands

## Lucky Strike

<table>
<thead>
<tr>
<th>Salience</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Distanced for majority - but some quite curious</td>
</tr>
<tr>
<td>• Many women unfamiliar with brand</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Brand Personality</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Confident</td>
</tr>
<tr>
<td>• Likes to be noticed</td>
</tr>
<tr>
<td>• Wacky</td>
</tr>
<tr>
<td>• ‘Cool’</td>
</tr>
<tr>
<td>• Flirtatious</td>
</tr>
<tr>
<td>• Cheeky</td>
</tr>
<tr>
<td>• Fun Loving</td>
</tr>
<tr>
<td>• Chatty</td>
</tr>
<tr>
<td>• 40’s film stars (detective/PI)</td>
</tr>
<tr>
<td>• American GI</td>
</tr>
<tr>
<td>• James Bond (Sean Connery)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Imagery</th>
</tr>
</thead>
<tbody>
<tr>
<td>• American Yuppies</td>
</tr>
<tr>
<td>• Arts/design students</td>
</tr>
<tr>
<td>• Poseurs</td>
</tr>
<tr>
<td>• Boy racers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Venue</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Smart cafes</td>
</tr>
<tr>
<td>• Abroad</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Imagery</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Pack:</td>
</tr>
<tr>
<td>- foreign looking</td>
</tr>
<tr>
<td>- unusual</td>
</tr>
<tr>
<td>• Product:</td>
</tr>
<tr>
<td>- American tobacco?</td>
</tr>
<tr>
<td>- roasted, toasted?</td>
</tr>
</tbody>
</table>
Brand Imagery For Key Brands

Lucky Strike

- Hooch
- Two Dogs
- Red Stripe
- ID
- Viz
- Private Eye

Wacky
Satirical
Unusual (fringe)

Response to Lucky Strike imagery

Some affection for brand image amongst students (esp.) and design/aesthetically literate (notably older idiosyncratic males) 
but majority cannot take seriously
↓
Too different
Too overt a statement
(without reassurance of advertising/street presence)

However

With some presence potential for appeal to interested parties could be quite strong
Brand Imagery for Key Brands

Benson & Hedges, Embassy (and Regal), share similar brand characteristics.

However
Attributes attributed vary according to smoker type.

Thus

More positive, accessible, acceptable characteristics of brand:

- Attributed to B&H by B&H (some Embassy) smokers
- Attributed to Embassy by Embassy (some B&H/Marlboro smokers)

More negative distancing characteristics of brand:

- Attributed to B&H by Embassy and Marlboro smokers
- Attributed to Embassy by B&H and Marlboro smokers

NB. Embassy tends to assume an older, more Northern, down to earth, straight talking profile.
Brand Imagery for Key Brands

Midmarket/Mainstream Brands

**Brand Personality**
- Sociable
- Casual, easy going
- Fun loving
- Down to earth
- Chatty
- Sense of humour (esp. Embassy)
- Arrogant
- Boring
- Dull
- Set in his ways
- Cautious
- Quiet

**User Imagery**
- Mr Average
- Farm labourer
- The lads
  - younger
  - starter brand
- Old grannies
- Ageing businessmen (sales)

**Venue Imagery**
- The local/Working Mens Club

**Product Imagery**
- Mid strength
- Smooth vs lacking flavour
Brand Imagery for Key Brands

Typical Analogies

**B&H**
- Sun
- Carlsberg/Heineken
- Ford Escort

**Embassy/Regal**
- Mirror
- John Smiths/Tetley
- Vauxhall Cavalier

- Average
- Mainstream
- Conformist
  (slightly downmarket - esp. Embassy)
Salience (Imagery) Overview

Marlboro smokers (+ Camel)

Lucky Strike (Chesterfield)
Camel

(Some ML smokers)

Has Salience/Kudos Via
Fashionability (iconography) vs
Popularity vs
Acceptability

B&H (Silk Cut)
Embassy Regal

(B&H smokers)

Embassy
Regal
Silk Cut
B&H
L&B

Lucky Strike (Chesterfield)
Camel

(Some MR smokers)

Marlboro Reds

Marlboro Lights

(B&H smokers)

(Marlboro smokers)

(Rothmans)

(B&H smokers)

Distanced

- Too unconventional, foreign, esoteric, arty

Embassy
Regal

(B&H smokers)

Lucky Strike
(Chesterfield)
Camel

Marlboro Reds

Premium smokers (excl. Camel)

Distanced

- Too conventional, popular, average, bland, characterless or past framework
Reactions to Marlboro Medium

Spontaneous reactions

Marlboro Medium included in initial mappings in 5 groups. Introduced separately in 2 groups.

Where Unannounced

- Not always noted as different
- Can perceive as new duty-free Marlboro Reds *pack*
- Affects market map positioning dependent upon main mapping dynamics

Where Announced

- Easier to perceive role/position because clear that it is new brand
  - Takes mid-market position with or just above B&H/Embassy

NB: Ultimately positioning of Medium dependent upon number of factors:
- initial focus - descriptor vs pack (colour/design)
- perceptions of house gap/marketplace ‘vision’
- perceptions of pack design
The Market Positioning of Marlboro Medium

At one level, dependent upon meaning ascribed to term "medium" which, in turn, is dependent upon

- Perceptions of marketplace - ie. market sectors
- Perceptions of House Ranges

Essentially 2 markets → Full strength (similar tar) vs Light/mild strength

Thus 2 variants to accommodate marketplace needs

- Embassy
  - Embassy Mild
- JPS
  - JPS Light
- Camel
  - Camel Light
- Marlboro
  - Marlboro Light

Less accepting of a medium position = Marketing Ploy
The Market Positioning of Marlboro Medium (cont’d)

Acceptance of Range and Perception of a strong middle and light market place re. brand strengths allows for acceptance of a brand positioned as Medium.

Alternative Vision

More complex

Perceive a wide market place encompassing
- Strong brands, medium brands, lighter brands (perceptions dictated more by flavour/taste than by tar levels per se)
- Range offered by brands themselves, be they strong, medium or light

Thus

<table>
<thead>
<tr>
<th>Full Strength Versions</th>
<th>Middling Version</th>
<th>Mildest Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong Brands</td>
<td>eg. Camel</td>
<td>Camel Lights</td>
</tr>
<tr>
<td>(eg. Camel, Marlboro)</td>
<td></td>
<td>Camel Mild</td>
</tr>
<tr>
<td>Medium Brands</td>
<td>eg. B&amp;H</td>
<td>B&amp;H Special Mild</td>
</tr>
<tr>
<td>(eg. B&amp;H)</td>
<td></td>
<td>Silk Cut</td>
</tr>
<tr>
<td>Light Brands</td>
<td>eg. Silk Cut</td>
<td>Silk Cut Mild?</td>
</tr>
<tr>
<td>(eg. Silk Cut)</td>
<td></td>
<td>Silk Cut Extra Mild</td>
</tr>
</tbody>
</table>

Acceptance of Range and Perception of a strong middle and light market place re. brand strengths allows for acceptance of a brand positioned as Medium.
The Market Positioning of Marlboro Medium

Degree of acceptance of a Medium Positioning (generally) also combines with perceptions of Marlboro Reds vs Marlboro Lights in dictating Marlboro Medium Position and perceived need.

Perceptions of Marlboro House varies according to sample

Older Males/Females (B&H, Embassy, Camel, Marlboro Reds)

- Gap between Marlboro and B&H/Embassy led by iconoclastic imagery of Marlboro and unique flavour rather than Strength (tar)
- Gap between Marlboro Reds and Marlboro Lights typical of/similar to other main brands vs lights variants (ie. lighter, more feminine version)

Question Need/Room for Marlboro Medium
The Market Positioning of Marlboro Medium (cont'd)

Remainder of Sample
(Younger Marlboro/Premiums)

<table>
<thead>
<tr>
<th>Marlboro Reds</th>
<th>Strong (strength) [Macho, hard, ballsy, individual]</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;H Embassy</td>
<td>Genuine &amp; Wide Gap</td>
</tr>
<tr>
<td>Marlboro Lights</td>
<td>Light (strength) [stylish, trendy, sophisticated, popular]</td>
</tr>
<tr>
<td>Silk Cut</td>
<td></td>
</tr>
</tbody>
</table>

See wide strength gap between Marlboro Red and Marlboro Light, reinforced by harder vs softer imagery

See room, role for 'Medium' Marlboro
However, exact position varies
The Market Positioning of Marlboro Medium

Camel
Marlboro Reds

Marlboros
MR
ML

Is there space?

B&H/Embassy

Stronger versus B&H, Embassy
(Red pack cues & associated imagery)

Strength of B&H, Embassy
(Medium descriptor and perceptions of market place/ market gap → ie. MR V.
Strong, B&H - middle strength
ML Lighter strength

Category with Marlboro Lights - slightly stronger
(Medium description seen as another light description plus perception of strength differences between MR & ML being typical for market)

Marlboro Lights

Silk Cut etc.

Is dependent on meaning consumers bring to Marlboro Medium
Meaning Ascribed to Marlboro Medium

Whilst position of Marlboro Medium is likely to become more defined as brand/pack becomes more familiar and consumers experience the product, *Currently*, meaning given to Marlboro Medium varies.

**Premium Smokers**

**PRODUCT LED**

ie. Medium descriptor draws attention to brand/gives meaning

Then need to search for meaningful imagery

**Function of these smokers being less familiar with Marlboro Reds (word medium = initial point of difference)**

**Marlboro Smokers**

**IMAGE LED**

ie. pack difference combined with medium descriptor allows meaning to be ascribed at image level (supported by product descriptor)

**Function of these smokers being familiar with Marlboro house brands Pack + ‘medium’ = difference**
Meaning Ascribed to Marlboro Mediums

- View market as essentially consisting of 2 variants
- Lack affinity with lighter variants
- ‘Medium’ triggers light associations

Factors combine to cause dismissal

No perceived role

- Want fuller cigarette
  - Marlboro Red
- Want lighter cigarette
  - Marlboro Lights

- Not answering perceived need
- Marketing ploy using Marlboro name and image (colour)

“Saying medium shows it doesn’t have the guts or confidence that Marlboro does...it’s just stealing the red to get people in and it’s got no real role, if they want a lighter Marlboro get Marlboro Lights”
Meaning Ascribed to Marlboro Mediums

Younger Premiums

Position immediately alongside B&H/Embassy

Vs

Pulled and pushed in opposing directions settling at a mid point (alongside B&H)

B&H/Embassy alternative

Can have relevance
- Not harsh like Marlboro Reds ✓ ✓ ✓
- Not “A lights” brand ✓ ✓ ✓
  (ie. effeminate, not for real smokers)

But also, is need to create an emotional image
(Turn to pack)

Marlboro Red
- Individuality
- Boldness

Marlboro Lights
- Style
- Sophistication

Married to

Derive images similar to that established by Marlboro smokers
Meaning Ascribed to Marlboro Mediums

Marlboro Smokers

Entrance of Marlboro Mediums throws image of Marlboro Reds and Marlboro Lights into relief

Very different brands yet sharing key house attribute

CONFIDENCE

Marlboro Red
Confidence which is:
- Hard
- Masculine/macho
- Aggressive
- (Arrogant)
- Outdoors

Most Marlboro Red smokers happy with this

Marlboro Light
Confidence which is:
- Stylish
- Sophisticated
- ‘Knowing’
- Cosmopolitan
- Urban

Some Marlboro Light (esp. males) uncomfortable with this

Marlboro Medium

- Retains boldness/confidence
- Reduces machoness, ruggedness
- Injects stylishness/urban cues
### The Nature of Marlboro Reds, Marlboro Lights Marriage

#### Marlboro Reds Imagery

**A Received Mythology**
- Rugged outdoor
- Rural small town America and/or Dallas, Nashville
- Overpowering/Self-destructive ‘film star’ analogies (James Dean, Mickey Rourke, Jack Nicholson)

#### Marlboro Light Imagery

**An Observed Mythology?**
- Urban in-crowd
- Places to be seen
- Fashions to wear
- Names to be associated with (Paris, Milan, Chanel)
- Evening focus
- Successful, glamorous actresses but a little uptight, unapproachable
- Pfeiffer, Benning, Madonna

#### Inner Directed

(Loner Mentality)

#### Spontaneous Attitude

*but* codified/fixed attributes

(brand meaning dominates user)

#### Projected me

(conscious of being seen)

#### Considered Attitude

*but* becoming codified (brand saying something clear about user)

Offers way into Marlboro

but could also be means of escaping codified Marlboro images?
Reactions to Pack

Rejectors of Concept
- Marlboro Reds/Marlboro Lights
  Hybrid
  Obvious - marketing ploy

Acceptors of Concept
- Clever combination
  Boldness/confidence of MR
  plus
  Style, design aesthetics of ML
  (touches of gold ✓ ✓)

However

Female Lights
More positive

vs

Female Premium
(concerns over red - esp. B&H)

Nevertheless

Younger Males (Premium)
find appealing, accessible

Recruitment dependent on ability to deal on a regular basis with Marlboro flavour (if not already into Marl. Lights)
Considered Responses to Marlboro Medium - Level of Interest in Brand

High Interest
- ML (Discomfort)
- MR (Health)
- Lights ≠ Me
- M Interest M products do not satisfy
- M Interest M products do not satisfy
- M Interest M products do not satisfy
- MM=ideal
- M Interest M products do not satisfy
- MM=ideal but Red!

Low Sample
- GP: Group overall
- Ind: Certain individuals (1-2)
- GP: Group overall
- Ind: Certain individuals (1-2)
- M students (Marl)
- M 25-34 (Marl)
- F 20-35 (Marl L)
- M 25-34 (Prem)
- F 25-34 (Prem)
- M 25-34 (Prem)
- M 20-25 (Prem)
- F students (Prem)

Key:
- GP: Group overall
- Ind: Certain individuals (1-2)
- NB: Part curiosity/part need fulfillment
- * Level of interest curbed by group environment?
Considered Responses to Marlboro Medium - Level of Interest in Brand

- Highest degree of interest evidenced amongst under 25

- Over 25 either cynical or too habitual *but* minority show interest
  - Marlboro Reds:
    - sufficiently Marlboro Reds (not Marl.Lights)
    - health benefit - trade down to satisfy health need and stay in-house
  - Premium female:
    - buy into brand with character
    - my sort of strength level
    - *but* Marlboro flavour/smell?!
      \[\downarrow\]
    - would need to trade off
  - Premium male (B&H):
    - full strength rip-off
    - *but* different sort of Marlboro (not strong, not light, not insipid image)

**THUS**
MAIN MARKET POTENTIALLY LIES WITH UNDER 25s
Potential for Trade-Up (Marl. Lights) or Switch (Premiums)

Trade-Up

Three types of Marlboro Light smokers

Marlboro (Light) image but Reject Lights category (MR - Too strong/macho)

I am a Marlboro smoker

Likely to Switch (esp. males)

Marlboro Lights Brand Image and Product delivery

I am a Marlboro Lights smoker

Likely Trialists (currently) but Longevity?

Marlboro Lights Product & Brand image support

I am a Lights smoker choosing an exciting brand

Unlikely to Switch
Potential for Trade-Up (Marlboro Lights) or Switch (Premiums)

Switch

Likelihood of switching determined by Marlboro flavour predisposition vs rejection and pack cues

Marlboro flavour rejectors - unlikely to switch (despite appeal of Marlboro image)
Marlboro flavour predisposed - interest in switching

but

<table>
<thead>
<tr>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red colour</td>
<td>Red colour</td>
</tr>
<tr>
<td>Masculine assertive</td>
<td>Masculine assertive</td>
</tr>
<tr>
<td>acceptable</td>
<td>✓ ✓</td>
</tr>
<tr>
<td>Enough style/light cues plus acceptance of red (esp. if embassy)</td>
<td>Explanation of switch (esp. if lack confidence)</td>
</tr>
<tr>
<td>Red colour and pack design still too macho (reminiscent of KKK)</td>
<td>Q-Why Marlboro Reds?</td>
</tr>
<tr>
<td>but</td>
<td>A-No these are Mediums!</td>
</tr>
<tr>
<td>Brand promise appeals</td>
<td>What do Mediums stand for</td>
</tr>
<tr>
<td></td>
<td>Want advertising to explain/justify choice</td>
</tr>
</tbody>
</table>

but

Q-Why Marlboro Reds?
A-No these are Mediums!
Potential Effect on Brand Imagery

For majority of interested parties:
- Marlboro smokers
- Younger Premiums (under 25)
  - bridges House gap
  - ‘House’ catering to varying needs ✓✓✓

Allows retention of
House loyalty
- health concerned who
  may switch over
- Lights dabblers who
  want more robust/
  male brand

Allows entrants
- Marlboro interested who find
  Marlboro Reds too harsh and
do not want to enter Lights
  category (because effeminate,
effete)

HOWEVER RESEARCH DOES INDICATE
THAT FOR SOME MARLBORO SMOKERS/
MARLBORO VOYEURS MARLBORO
BRANDS ARE WEAKENED

Marlboro Lights thrown
into relief as slightly
superficial/glitzy
(House is also now clearly
about Reds!!!)

Marlboro Reds lending
image to ‘milder brands’
Getting soft?
Potential Effect on Brand Imagery

Implication?

To avoid latter situation (ie. impact on House brand)

Clear, differentiating advertising may/would be needed to demonstrate confidence in Marlboro Medium in its own right

Advertising could also arrest any process whereby House could be seen to be about Reds and Marlboro Lights becomes a glitzy Marlboro imposter

How

By creating set of Marlboro Medium values which are less about Reds and more about latent Marlboro Medium values already referred to

RISK/CAUTION:
Appealing to potential 'trade-up' consumers as well as 'switchers'

vs

RISK/CAUTION:
Not advertising and allowing various perceptions of brand to lead the way resulting in similar effect
The Way Forward

- Quantitative research to determine numerical implications of qualitative findings

- If supportive of qualitative findings → consider need to advertise

Being cognisant of

- Desire for House loyalty (evidenced amongst a few Reds potential switchers out of House/uncomfortable Lights smokers)
- Desire to enter iconoclasm of Marlboro via more accessible product (evidenced amongst younger Premium smokers)

and

Potential appeal/Positioning of Lucky Strike to target age group