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**Qualitative Research
into the UK Potential
for Marlboro Medium**

Job no: 6602

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Presented to:
Rothmans UK Ltd.
Oxford Road
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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



Director literate/oriented

Magazines

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

Conformists

Film repertoires

- American blockbusters
- Comedy, action, thriller



Actor/Actress orientated

Magazines

- Marie Claire
- Elle
- Cosmopolitan
- Hello
- Sports Magazines

Advertising Recall

Television

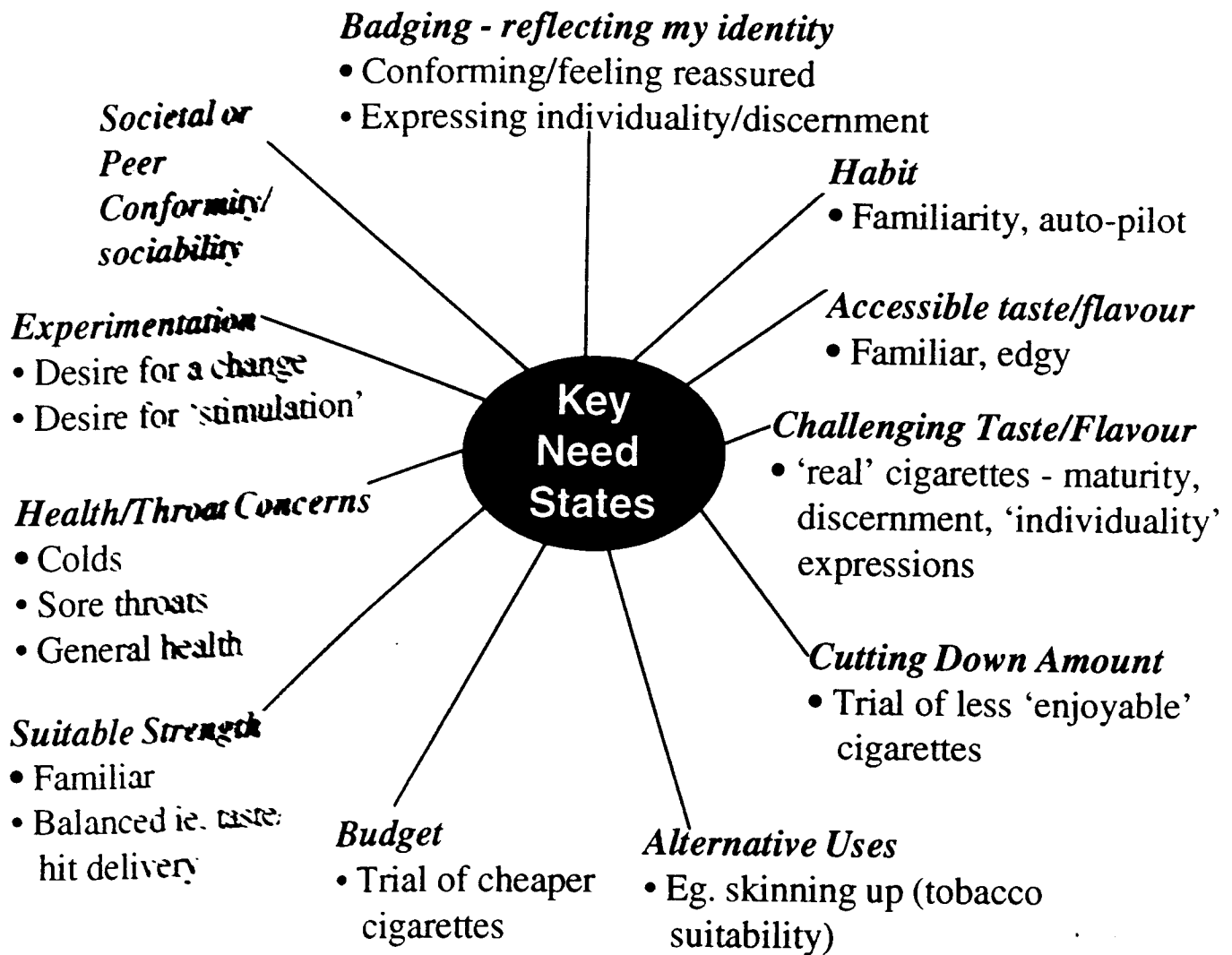
- Guinness
 - Levis
 - John Smith's
 - Worthingtons
 - Bacardi
 - Strongbow
 - McDonalds
- Plus*
- Dance
 - Spacewoman
 - Penguins/Jack Dee
 - Harry Enfield
 - Radio station
 - Snake
 - Facts of life
- Female - Diet Coke (coffee break)
Male - Holsten Pils (Asshole)

- 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



Personality of the individual and the combination of Need States, or circumstances emphasising a particular Need State, will dictate Cigarette Repertoires 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

Broader Repertoire
ie. Brand loyalty
encompasses 2 or more
brands

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

Premium Smokers
(under 30)

**Need States
Evidenced**

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

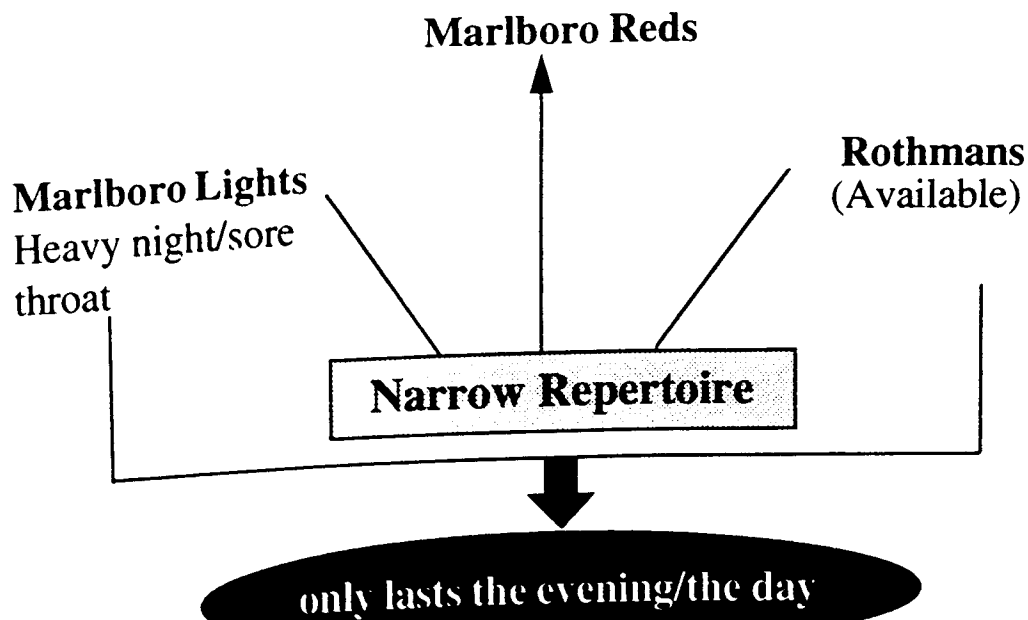
Taste/flavour/strength suitability

Badging (conforming/feeling reassured)

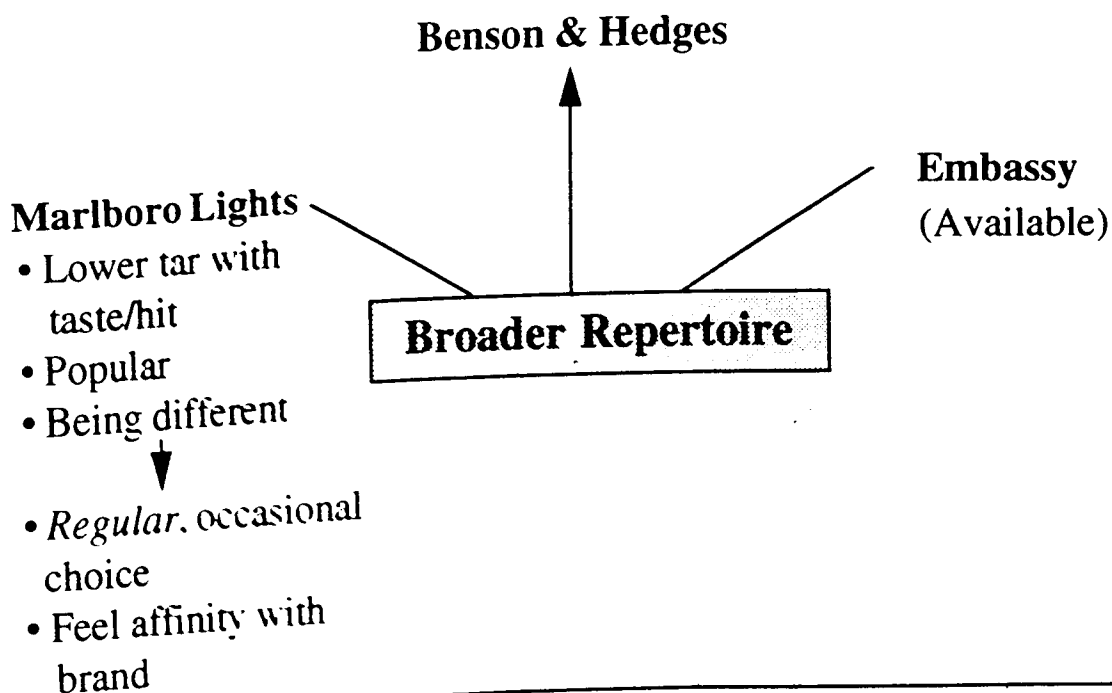
Premium Smokers (under 30)

- 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



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



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/repertoire
(also Rothmans, Marlboro Lights, Berkeleys,
JPS occasionally)
- Male 20-25 - B&H/Embassy loyalists
(4 x Marlboro Lights occasionals)
- 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 occasionals)

Market Mapping Dynamics

Key Factors Influencing Mappings

<i>Flavour -</i>	Distinctive flavour <i>vs</i> accessible (acceptable) flavour
<i>Strength-</i>	Strong (<i>vs</i> medium) <i>vs</i> light/mild
<i>Popularity/ Presence -</i>	High availability/presence <i>vs</i> not always available/seen
<i>Origins -</i>	'Foreign' (<i>vs</i> International) <i>vs</i> 'British'
<i>Imagery -</i>	Upmarket \longleftrightarrow Downmarket
<i>Price -</i>	Premium <i>vs</i> cheap

Market M

Dynamics

Key fa
on

d some
initially
mic

- Younger (some c
plus Camel smokers
Foreign (American/ Inte
'British' dynamic (ie. 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

Question?

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?

Marking Mapping Dynamics (cont'd)

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

Imagery

MALE

Strong (distinctive) flavour

American/Foreign (International)

Strong ←

Rothmans

Lucky Strike
Chesterfield

→ Obscure

Camel
Camel Filters
Marlboro Reds

Camel Lights
Camel Mild
L.S Lights

Medium (normal/average)

British

Marlboro Lights

B & H
Embassy
(Regal)
(Rothmans)

Silk Cut

Popular/middle of the road

Dunhill
(Rothmans)

→ 'Posh' (older)

↑
Camel Lights
L.S. Lights
Marl Lights

L & B
Royals
(Chesterfield)

→ Cheap (older)

Weak

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

FEMALE

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

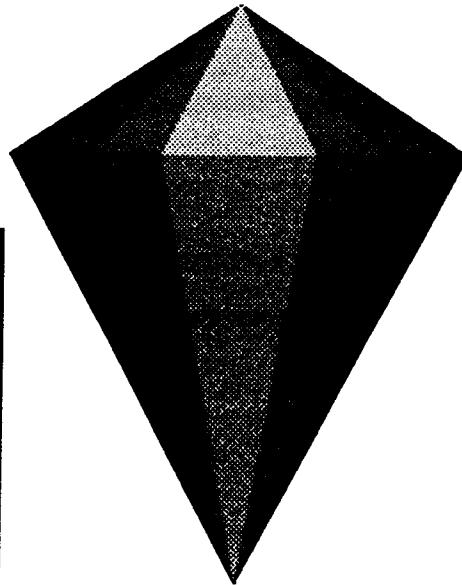
Brand Imagery for Key Brands

Saliency

- Emotional Closeness to brand

Brand Personality

- Brand character and personification
- Personality traits



User & 'Venue' Imagery

- Typical users
- Typical places brand perceived to be seen

Product Imagery

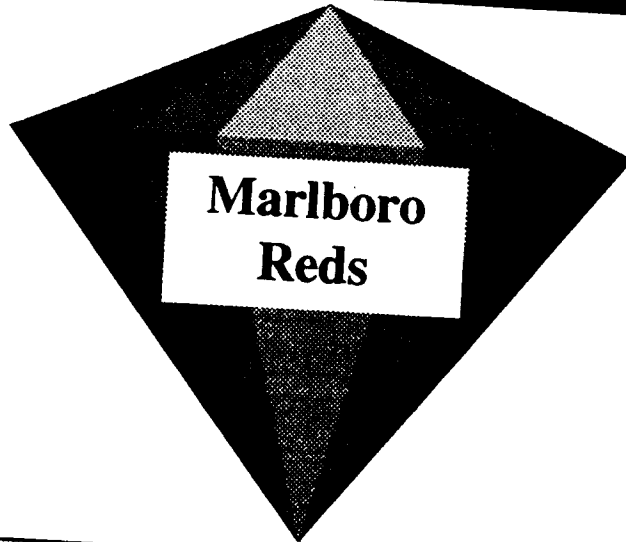
- Perceived pack and product characteristics

Brand Imagery for Key Brands

Marlboro Reds

Saliency

- Marlboro Reds* - Very close
- Marlboro Lights* - Fairly close (strength & image? = distancing)
- Camel* - 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)

AMERICANS

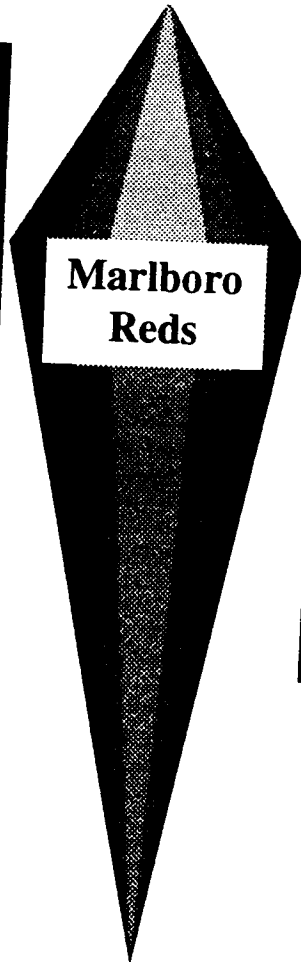
James Dean
- Iconoclastic
Cowboys/John Wayne
Tom Selleck
Stacey Keach
Micky Rourke
Jack Nicholson

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)



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

Marlboro Red
Smokers/occasional
smokers

Some Marlboro
Lights/Some
Young
Premiums
(esp. males)

Other Marlboro
Lights/Other
Premiums
(esp. females)

Identification

Aspirational

Distancing

Personality/
User Imagery

Mature/Masculine
Independent
Confident (tough)
Casual
Discerning
Knowledgeable
Interested in life
(e.g.. art, music)



'me'

Plus

Full Flavored, tasty
cigarette

Personality/
User Imagery



But a little too:

- Macho, cool, obvious
- Overtly American

Also

- Too strong, harsh, hard on the throat
- (strong smell)

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

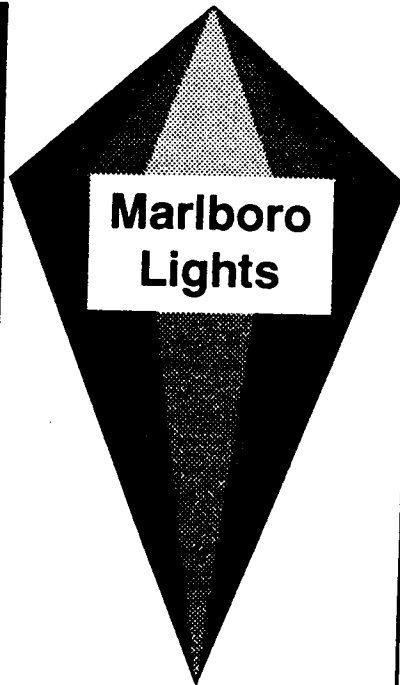
Marlboro Lights

Saliency

- *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
premiums (esp.
occ. MLs)

**Identification/
aspirational**

- Youthful
- Outgoing
- Sociable
- Contemporary
- Sophisticated
- Cosmopolitan
- Modern

• Reflects me/
my values

• Light with
flavour ✓✓✓

Some
Marlboro Reds

**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
premiums (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

Saliency

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

Brand Personality

Eccentric
Wayward
Loner, detached
Aloof, unsociable

vs

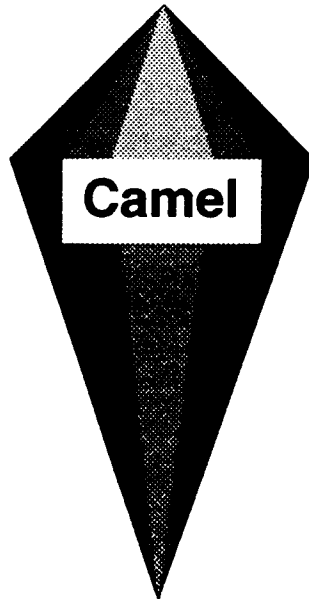
Outgoing
Adventurous
Assertive
Determined

Explorer
Adventurer
Safari suit

vs

Down and out,
ging 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

Drinks

- Whisky
- Two-Dogs
- Budvar
- Guinness

Cars/Magazines

- Loaded
- Viz

Places

- Berlin
- Sydney
- (New York)

- 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

Saliency

- Distanced for majority - but some quite curious
- Many women unfamiliar with brand

Brand Personality

- Confident
- Likes to be noticed
- Wacky
- 'Cool'
- Flirtatious
- Cheeky
- Fun Loving
- Chatty
- 40's film stars (detective/PI)
- American GI
- James Bond (Sean Connery)



User Imagery

- American Yuppies
- Arts/design students
- Poseurs - label conscious
- Boy racers

Venue

- Smart cafes
- Abroad

Product Imagery

- Pack:
 - foreign looking
 - unusual
- Product:
 - American tobacco?
 - roasted, toasted?

Brand Imagery For Key Brands

Lucky Strike

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)

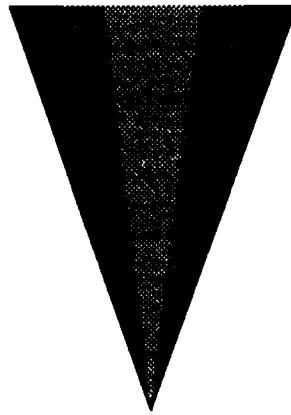
NB. Embassy tends to assume an older, more
Northern
down to earth, straight talking profile

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

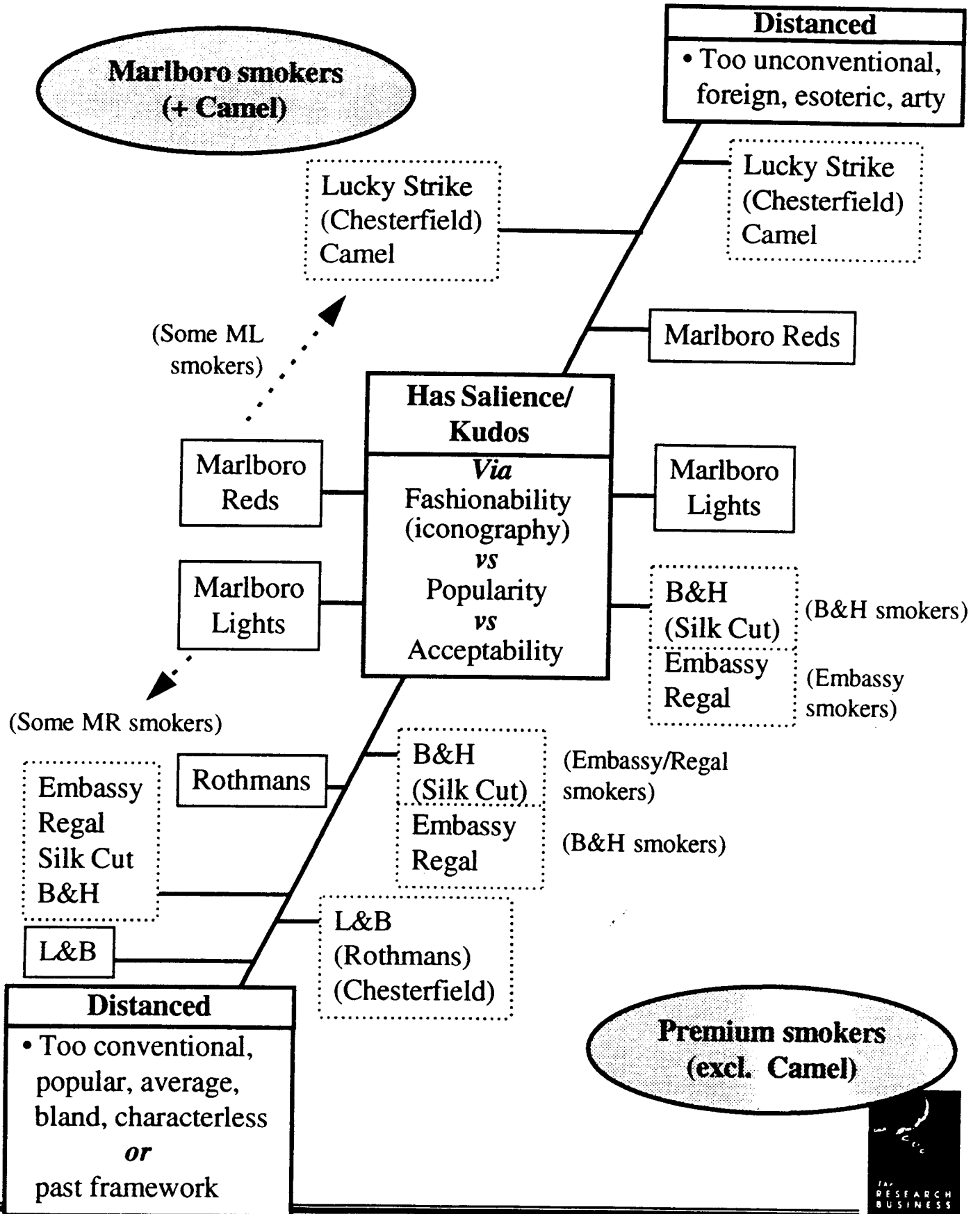
- Sun
- Carlsberg/Heineken
- Ford Escort

Embassy/Regal

- Mirror
- John Smiths/Tetley
- Vauxhall Cavalier

- Average
- Mainstream
- Conformist
(slightly downmarket -
esp. Embassy)

Salience (Imagery) Overview



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

One Vision

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

Thus 2 variants to accomodate market place needs

eg

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

Less accepting of a medium position
= Marketing Ploy

The Market Positioning of Marlboro Medium (cont'd)

Alternative Vision



More complex

Perceive a widemarket 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

Middling Version

Full Strength Versions

Mildest Version

Strong Brands
(eg. Camel, Marlboro)

eg. Camel

Camel Lights

Camel Mild

Medium Brands
(eg. B&H)

eg. B&H

B&H Special Mild

Silk Cut

Light Brands
(eg. Silk Cut)

eg. Silk Cut

Silk Cut Mild?

Silk Cut Extra Mild

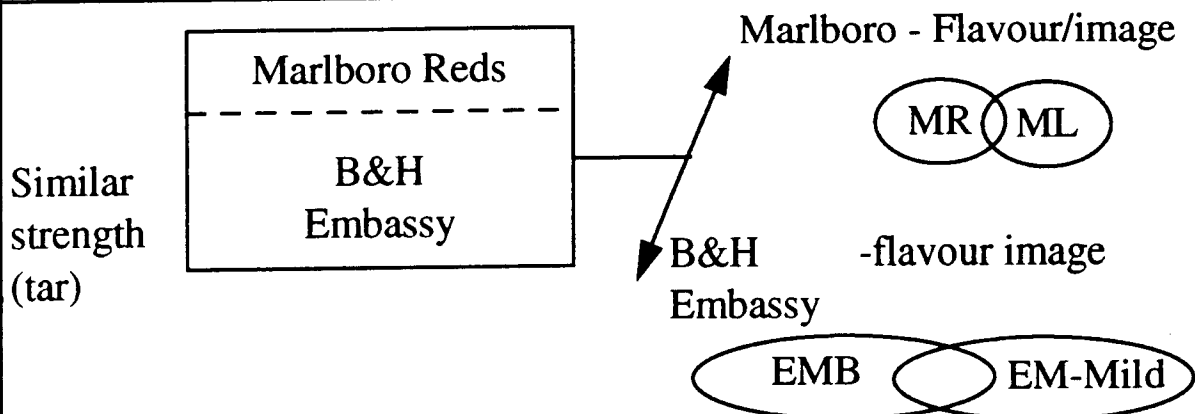
Acceptance of Range *and* Perception of a strong middle and light market place re. brand strengths allows for acceptance of a brand positioned as Medium

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)

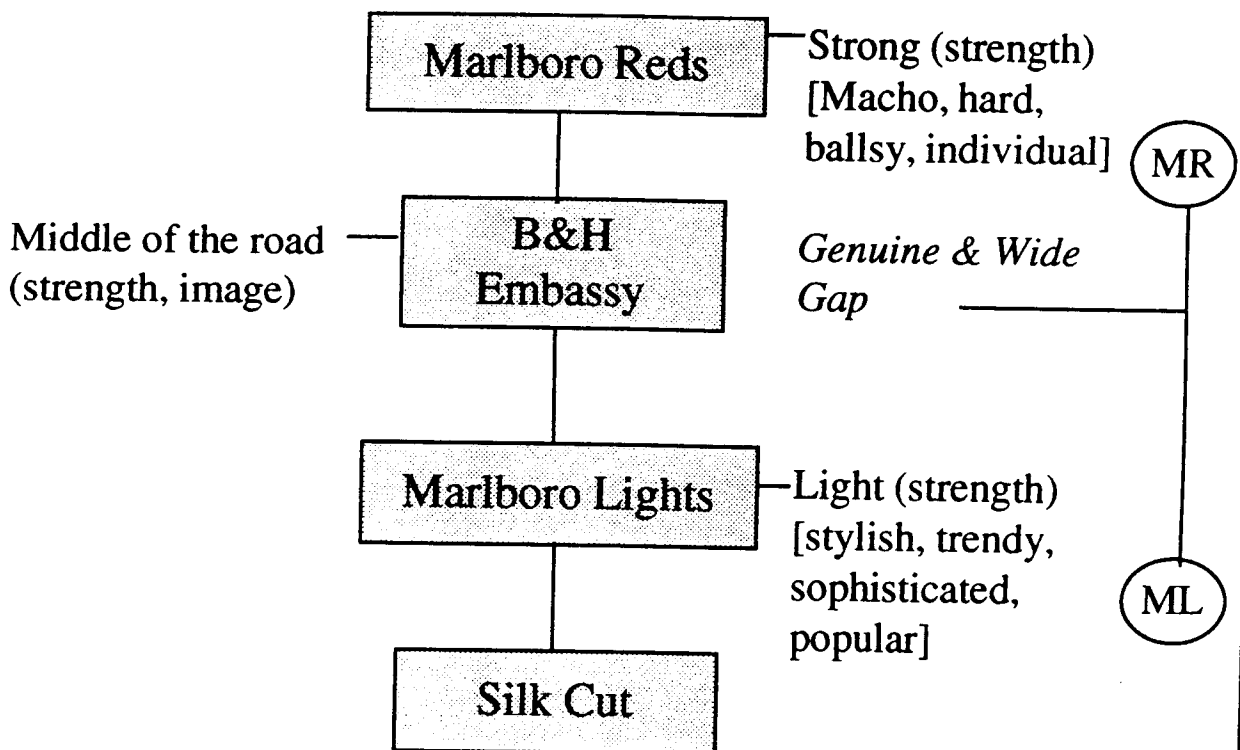


- Gap between Marlboro and B&H/Embassy led by iconoclastic imagery of Marlboro and unique flavour rather than Strength (tar)
- Gap between Marlboro Reds and Marlboro Lights typical of/similar to other main brands vs lights variants (ie. lighter, more feminine version)

Question Need/Room for Marlboro Medium

The Market Positioning of Marlboro Medium (cont'd)

Remainder of Sample (Younger Marlboro/Premiums)

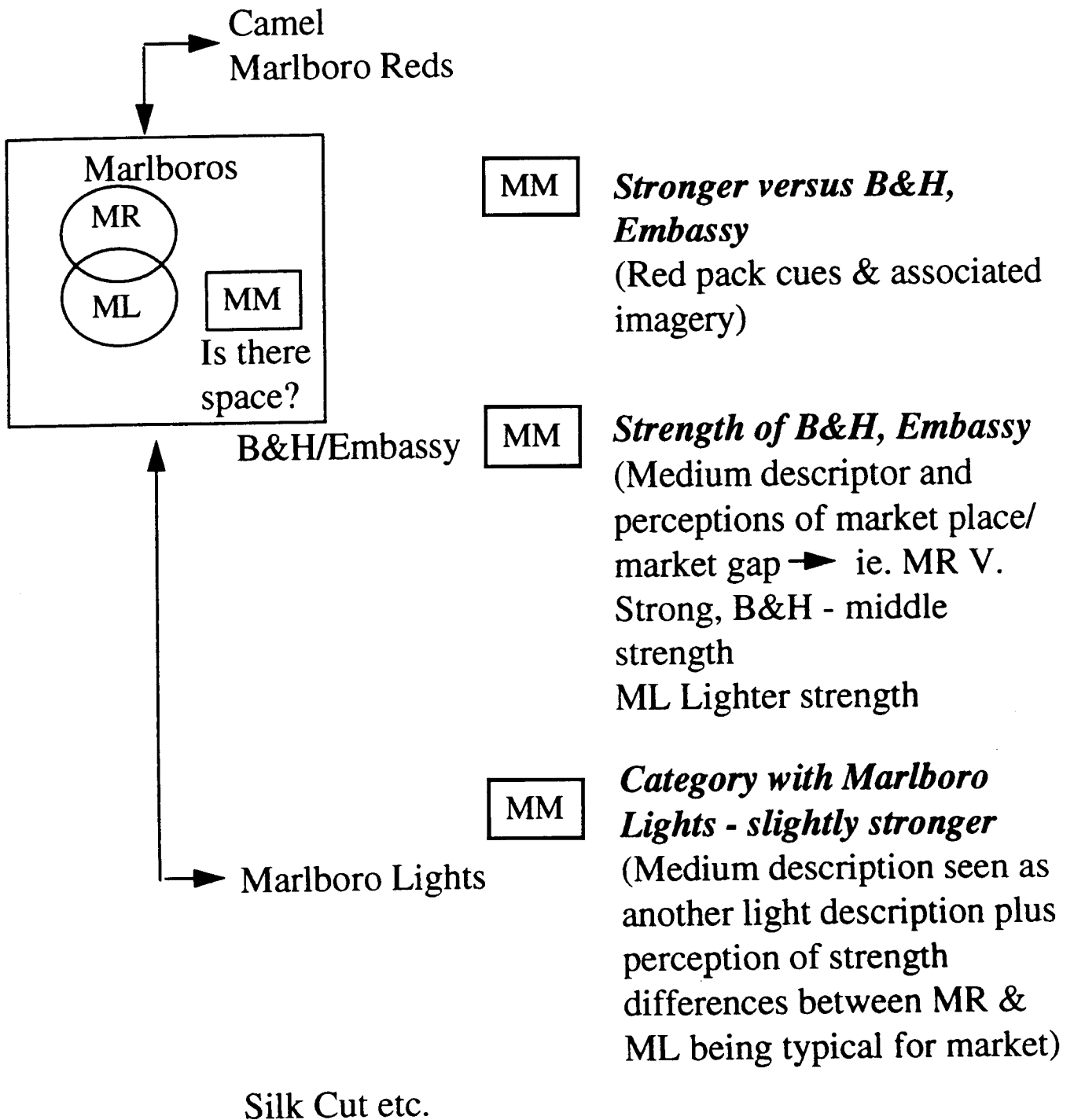


See wide strength gap between Marlboro Red and Marlboro Light, reinforced by harder vs softer imagery



See room, role for 'Medium' Marlboro
However, exact position varies

The Market Positioning of Marlboro Medium



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

Older Premiums

- 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

MM

- 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

Married to

Marlboro Lights

↓
Style
Sophistication

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

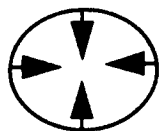
When thrown into relief

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)

Inner Directed
(Loner Mentality)



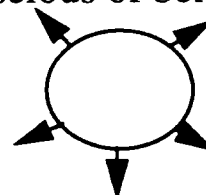
Spontaneous Attitude
but codified/fixed attributes
(Brand meaning dominates user)

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

Projected me
(conscious of being seen)



Considered Attitude
but becoming codified (Brand
saying something clear
about user)

MMI

Offers way
into Marlboro
but could also be means
of escaping codeified
Marlboro images?

Reactions to Pack

Rejectors of Concept

- Marlboro Reds/Marlboro Lights

Hybrid



Obvious - marketing ploy

Acceptors of Concept

- Clever combination



Boldness/condifence 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

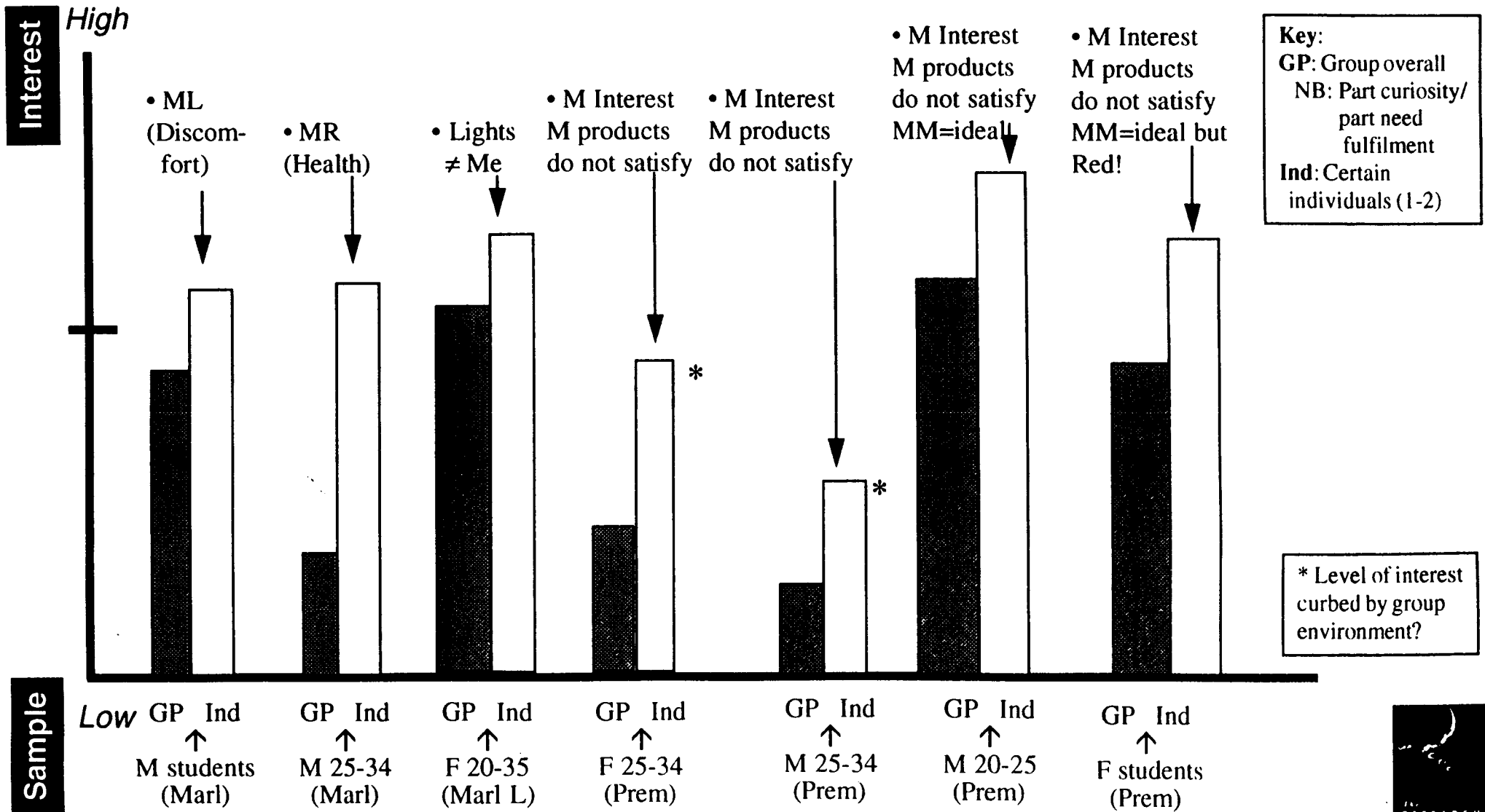
Younger Males (Premium)

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



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?!

↓

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**

Marlboro
Lights

Premium
B&H/Embassy

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

Female

Red colour



Masculine assertive



acceptable

Enough style/light cues plus acceptance of red (esp. if embassy)

Vs

Red colour and pack design still too macho (reminiscent of KKK)

but

Brand promise appeals

Vs

Male

Red colour



Masculine assertive



but

Explanation of switch (esp. if lack confidence)

Q-Why Marlboro Reds?

A-No these are Mediums!

What do Mediums stand for

Want advertising to explain/justify choice

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 sbecomes 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