

50198 9212

TOTAL MORE
VS
TOTAL B&H FULL FLAVOR

- I. Loyalty -- Loyalty to More increased substantially between 1977 and 1978. In 1978, brand loyalty levels for More versus B&H were equal.

SMOKED BOTH PERIODS

	<u>Total More</u>		<u>Total B&H FF</u>
	<u>1977</u>	<u>1978</u>	<u>1978</u>
	(171)	(339)	(622)
1. <u>Brand Loyal</u> (Did not switch)	<u>75</u>	<u>85</u>	<u>87</u>
2. <u>Non-Brand Loyal</u>	<u>25</u>	<u>15</u>	<u>13</u>
Switched to another brand in same category	16	7	4
*Switched to another brand in different category	9	8	9

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II. Switching Patterns -- Both More and B&H gains/losses skew toward 100mm and older (35 and over) smokers. Gains for More come equally from Non-Menthol/Menthol and male/female smokers. However, B&H gains proportionately more Non-Menthol and female smokers. More also gains more smokers from the Full Flavor rather than Low Tar category, while B&H draws equally from both flavor groups. More losses are distributed equally between Full Flavor and Low Tar smokers. B&H, however, loses more heavily to Low Tar brands. Although both brands reflect heavier losses among women versus men, B&H shows an even greater proportion of female losses than does More.

	Gains			Losses		
	Total More	Total	Total	Total More	Total	Total
	1977	1978	B&H FF	1977	1978	B&H FF
	(39)	(45)	(120)	(42)	(51)	(80)
1. <u>Length</u>						
* 70-85mm	74	42	44	46	40	39
* 100-120mm	26	58	56	54	60	61
2. <u>Flavor Type</u>						
* Non-Menthol	72	51	61	64	53	54
* Menthol	28	49	39	36	47	46
3. <u>Tar Level</u>						
* Full Flavor	77	78	48	67	49	38
* Low Tar	23	22	52	33	51	62
-- Fuller Flavor	18	18	46	24	41	51
-- Ultra Low	5	4	6	9	10	11
4. <u>Demographics</u>						
* Men	46	49	34	43	43	30
* Women	54	51	66	57	57	70
* 18-34	26	16	36	24	29	30
* 35 And Over	74	84	64	76	71	70

*Category = Full Flavor (Menthol & Non-Menthol)

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III. Prime Prospects -- Switchers to More and B&H are likely to be older smokers.

Switchers to More and B&H, relative to population, are likely to be older individuals.

More Menthol -- Females - 35 & Over (168)
 Filter -- Males - 35 & Over (144)
 Females - 35 & Over (115)

*B&H 100's M -- Females - 18-34 (198)
 F -- Females - 35 & Over (126)

*Index = % of switchers divided by % of population

IV. Source of Gains and Losses -- The major sources of net smokers gains for More are Salem Full Flavor and Belair. B&H does not have one predominant source of incremental gains, rather the brand draws equally from Vantage, Pall Mall, Salem FF, Winston FF and Merit.

More smoker losses are distributed among several brand, none of which represent major sources of losses. These brands are Salem Lights, Winston FF and Virginia Slims. B&H, which shows an overall net smoker gain (compared to More's net smoker loss) does not reflect any competitive brands to be major sources of smoker losses.

For every 1000 brand smokers in October, 1977, the following switching occurred between then and April, 1978:

Per 1000 Smokers	TOTAL MORE			TOTAL BENSON & HEDGES		
	Gain	Loss	Net	Gain	Loss	Net
1. Total Gain/Loss	119	136	-17	176	118	+58
2. Major Source of Gain/Loss*						
A. For More						
1. Salem FF	13	0	+13	10	4	+ 6
2. Belair	13	0	+13	3	3	0
3. Salem Lts.	0	8	- 8	13	9	+ 4
4. Winston FF	3	11	- 8	9	3	+ 6
5. Virginia Slims	0	8	- 8	4	0	+ 4
B. For Benson & Hedges						
1. Vantage	0	5	- 5	10	3	+ 7
2. Pall Mall	8	3	+ 5	7	0	+ 7
3. Winston FF	3	11	- 8	9	3	+ 6
4. Kent Regular	3	5	- 2	6	0	+ 6
5. Salem FF	13	0	+13	10	4	+ 6

*Ranked in order of NET
Switcher Gains/Losses

TOTAL MORE

	% OF Switching Gains			% OF Switching Losses			Net Change		
	Total MORE		Total B&H	Total MORE		Total B&H	Total MORE		Total B&H
	1977	1978		1977	1978		1977	1978	
<u>NON FILTER</u>	<u>1.5</u>	<u>1.3</u>	<u>.4</u>	<u>.5</u>	<u>.3</u>	<u>.2</u>	<u>1.0</u>	<u>1.1</u>	<u>.3</u>
Pall Mall	.5	.8	.2	.5	-	.2	-	.8	-
Chesterfield	.5	.3	-	-	-	-	.5	.3	-
Roll-Your-Own	-	.3	-	-	.3	-	-	-	-
CAMEL	.5	-	.3	-	-	-	.5	-	.3
<u>FULL FLAVOR NM</u>	<u>8.6</u>	<u>3.7</u>	<u>4.3</u>	<u>7.2</u>	<u>3.7</u>	<u>1.8</u>	<u>-1.6</u>	<u>-</u>	<u>2.5</u>
WINSTON	1.0	.3	.9	.5	1.1	.3	.5	.8	.6
Marlboro	2.5	.5	.6	.5	-	.3	2.0	.5	.3
Pall Mall	.5	.8	.7	-	.3	-	.5	.5	.7
Benson & Hedges	2.0	.5	-	2.0	-	-	-	.5	-
Virginia Slims	.5	-	.4	1.5	.8	-	-1.0	.8	.4
<u>LOW TAR NM</u>	<u>4.1</u>	<u>1.0</u>	<u>6.0</u>	<u>5.1</u>	<u>3.2</u>	<u>4.3</u>	<u>-1.0</u>	<u>-2.2</u>	<u>1.6</u>
Fuller Flavor	2.5	.5	-	3.0	2.4	-	-.5	-1.9	-
WINSTON Lights	.5	.3	.7	.5	.3	.4	-	-	.3
VANTAGE	.5	-	1.0	1.0	.5	.3	-.5	.5	.7
Merit	.5	-	.3	.5	.3	.4	-	.3	.2
Kent (Reg.)	-	.3	.6	-	.5	-	-	.3	.6
Kent Golden Lights	.5	-	.9	-	.3	.9	.5	.3	-
Marlboro Lights	-	-	.6	-	.3	.6	-	.3	-
<u>Ultra Low Tar</u>	<u>1.0</u>	<u>.5</u>	<u>.9</u>	<u>2.0</u>	<u>.8</u>	<u>1.0</u>	<u>-1.0</u>	<u>-.3</u>	<u>-.2</u>
NOW	-	-	-	.5	.3	-	-.5	.3	-
True	.5	.5	.2	.5	-	.3	-	.5	.1
Carlton	.5	-	.6	1.0	.5	.6	-.5	.5	-
<u>SALEM</u>	<u>5.6</u>	<u>5.9</u>	<u>6.9</u>	<u>7.6</u>	<u>6.4</u>	<u>5.5</u>	<u>-2.0</u>	<u>-.5</u>	<u>1.5</u>
Full Flavor	5.0	4.4	4.1	5.5	2.8	2.7	-.5	1.6	-
SALEM	1.5	1.3	1.0	1.5	-	.4	-	1.3	.6
Kool	.5	.3	.2	-	.3	-	.5	-	.2
Benson & Hedges	-	-	-	-	.3	-	-	.3	-
Newport	-	.3	-	-	-	.2	-	.3	.2
Belair	1.0	1.3	.3	1.0	-	.3	-	1.3	-
Saratoga	-	-	.2	-	.3	.3	-	.3	.1
<u>Fuller Flavor</u>	<u>-.5</u>	<u>1.7</u>	<u>2.8</u>	<u>2.0</u>	<u>3.2</u>	<u>2.9</u>	<u>-1.5</u>	<u>-1.5</u>	<u>.5</u>
Low Tar	-	-	1.3	1.0	.8	.9	-1.0	.8	-
SALEM Lights	-	.3	-	-	.3	.2	-	-	.2
VANTAGE	.5	.8	.6	.5	.3	.2	-	.5	.4
Merit	-	.3	.3	-	.5	.7	-	.3	.5
Kool Super Lights	-	-	-	-	-	-	-	-	-
<u>Ultra Low Tar M</u>	<u>-</u>	<u>-</u>	<u>.3</u>	<u>-</u>	<u>.6</u>	<u>.3</u>	<u>-</u>	<u>-.6</u>	<u>-.2</u>
True	-	-	-	-	.3	.3	-	.3	.3
NOW	-	-	.3	-	.3	-	-	.3	-
 <u>TOTAL SWITCHING</u>	 <u>19.8</u>	 <u>11.9</u>	 <u>17.6</u>	 <u>20.4</u>	 <u>13.6</u>	 <u>11.8</u>	 <u>-.6</u>	 <u>-1.7</u>	 <u>+5.8</u>
<u>GAIN/LOSS</u>									

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	Distribution Of Switching Gains			Distribution Of Switching Losses		
	Total More		Total B&H 1978	Total More		Total B&H 1978
	1977	1978		1977	1978	
<u>NON-FILTER</u>	7.7	11.1	2.5	2.4	2.0	1.3
Full Mall	2.6	6.7	.8	2.4	-	1.3
Camel	2.6		1.7	-	-	-
Chesterfield	2.6	2.2	-	-	-	-
Roll-Your-Own	-	2.2	-	-	2.0	-
 <u>FULL FLAVOR NM</u>	 43.6	 31.1	 24.1	 38.1	 27.5	 15.1
Winston	5.1	2.2	5.0	2.4	7.8	2.5
Marlboro	12.8	4.4	3.3	2.4	-	2.5
Viceroy	2.6	2.2	.8	2.4	-	2.5
Raleigh	2.6	2.2	.8	-	2.0	-
Tareyton	2.6	-	3.3	2.4	2.0	-
Full Mall	2.6	6.7	4.2	-	2.0	-
Benson & Hedges	10.3	4.4		9.5	-	
 <u>LOW TAR NM</u>	 20.5	 8.8	 34.2	 23.8	 23.5	 37.5
Fuller Flavor	15.6	4.4	30.0	14.4	17.6	28.7
Winston Lights	2.6	2.2	4.2	2.4	2.0	3.8
Vantage	2.6	-	5.8	4.8	3.9	2.5
Merit	2.6	-	1.7	2.4	2.0	3.8
Kent Regular	2.6	2.2	3.3	-	2.0	-
Kent Golden Lights	2.6	-	5.0	-	2.0	7.5
Marlboro Lights	-	-	3.3	-	2.0	5.0
 <u>Ultra Low Tar</u>	 5.2	 4.4	 4.2	 9.6	 5.9	 8.8
Now	-	-	-	2.4	2.0	-
True	2.6	4.4	.8	2.4	-	2.5
Carlton	2.6	-	3.3	4.8	3.9	5.0
 <u>MENTHOL</u>	 28.2	 48.9	 39.2	 35.7	 47.1	 46.3
Full Flavor	25.7	35.4	21.5	26.3	19.8	21.6
Salem	7.7	11.1	5.8	7.2	-	3.8
Kool	2.6	2.2	.8	-	2.0	-
Belair	5.1	11.1	1.7	4.8	-	2.5
Benson & Hedges		-			2.0	
Newport		2.2	-		-	1.3
 <u>Fuller Flavor</u>	 2.6	 13.3	 15.9	 9.6	 23.6	 22.8
Low Tar	-	-	7.5	4.8	5.9	7.5
Salem Lights	-	2.2	-	-	2.0	1.3
Vantage	-	6.7	3.3	2.4	2.0	1.3
Merit	2.6	2.2	1.7	-	3.9	6.3
Kool Super Lights	-	-	-	-	3.9	-
B&H Lights	-	-	-	-	-	-
 <u>Ultra Low Tar M</u>	 -	 -	 1.7	 -	 4.0	 2.5
Now	-	-	1.7	-	2.0	-
True	-	-	-	-	2.0	2.5