MINDBASE

Current Buyers
- tend to be more mature mindsets   (overindexed to tot sample)
- Composition

	Tot	C	P	V	
UC	13	10	15	17	
AA	1	1	1	2	COMPOSITION
RE	2	2	7	9	Core ⇒ Rm , NT , MA
NT	23	22	21	23	Pros ⇒ NT , UC , Rm
FC	11	11	12	9	Vol ⇒ NT , UC , Rm , IN
IN	12	11	13	15	
Rm	23	25	16	16	[sig]
MA	16	17	12	9	

- Mindbase vs Equity Study, Group size

	MINDBASE	Equity Study	
Core	4.9	4.8	Similar sizing across both studies, although equity study shows larger Prospect base (attitudinally loyal)
Pros	1.9	3.0	
Vol	2.2	2.5	
	9.0	10.3	

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│ MINDBASE │
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product proposition
is good to hold on
to core & UBs !

Interest in ~~cigarette~~ AF cigarette

		TOT	Segments	C P V	UB	
- "APPEAL of AF cig"	⇒ TB	49	45-55	59 47 48	60	sig
	⇒ T2B	64	62-70	74 68 68	74	sig

- "AF" does impact perceptions of product delivery

⇒

	Ideal	AF
Smooth	60	52
Harsh	1	6
Natural	47	52
Artificial	2	11
Flavorful	49	40
Bland	5	13
Weak	8	23
Strong	16	12

- Upside opportunity exists (beyond WIN UBs) for an AF cig made by WIN
  - "Likeliness to buy an AF cig by WIN"

		TOT	UL	AA	RE	NT	FC	IN	PM	MA	
nuw p.23	TB	15	13	7	9	15	12	14	22	20	sig
	% of segment w/ WIN as UB	8	5	3	2	8	8	8	14	16	
	Upside	7	8	4	7	7	4	6	8	4	
nuw p.24	T2B	22	21	13	15	22	19	21	29	29	sig
	% of segment w/ WIN as UB	8	5	3	2	8	8	8	14	16	
	Upside	14	16	10	13	14	11	13	15	13	

	TOT	Core	Pros	Vul	LTP	WIN UB
T2B	22	87	65	66	14	84

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ESCAPISM

- "feel need to escape daily grind" } More prevalent among younger mindsets
  "looking for ways to simplify life" } (UC , AA , RE)
                                        Under indexed among ⇒ FC, IN, MA

- RM heavy on simplification

- Self descriptions ⇒

	Segments			Buyer Groups
Serious	AA			Vulnerables
Stressed	AA	RE	Nt	
Care-free	AA	IN	MA	Vulnerables, Core
Pessimistic	FC			Prospects, Vulnerables

- Active ⇒ UC AA RE   Under-index ⇒ MA
  Passive ⇒ nothing popped

  ~~"feel need to escape"~~ ⇒ } More prevalent among Prospects & Vul vs. Tot
  "simplify life" .... ⇒ }   (22%)   (24%)   (17%)
                                        (70-80)   (35-54)
  ⇒ All loyalty groups are a little higher on passive escapism vs. active.

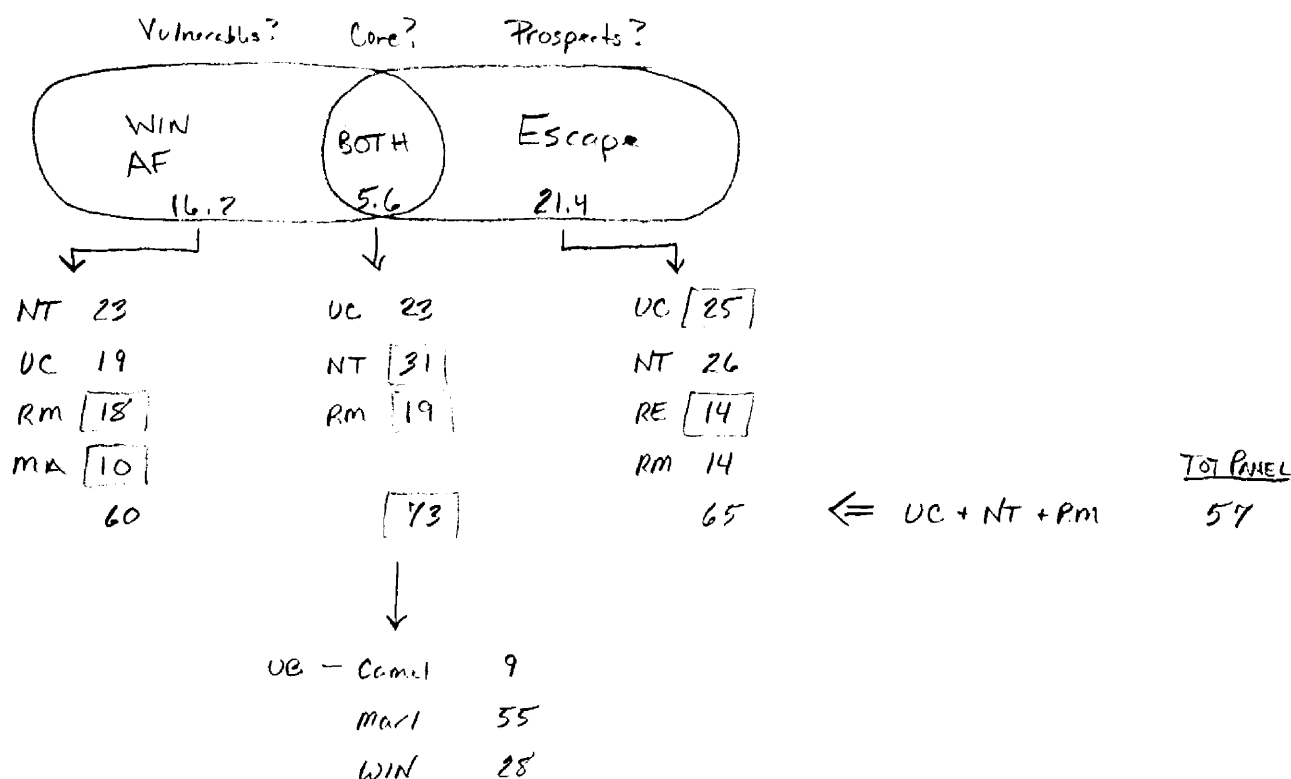53230 0856

MINDBASE

PROPOSITION APPEAL

- "Likliness to a cig described as being "made w/ only, 100% tobacco, AF for a NS taste."

	Tot	Segments	Core	Pros	Vul	WIN UB	
TB	39	34-48	[56]	44	40	[56]	[5·9]
T2B	62	56-69	[77]	[74]	68	[75]	

AF/ESCAPISM OVERLAP

- AF ⇒ FP Nm 21+ likely to purchase (T2B) WIN AF cig
- Escape ⇒ FP Nm 21+ scoring high on escapism

Vulnerable?   Core?   Prospects?

WIN
AF   BOTH   Escape
16.7   5.6   21.4

NT 23	UC 23	UC [25]
UC 19	NT [31]	NT 26
Rm [18]	Rm 19	RE [14]
MA [10]		Rm 14
60	[73]	65	⇐ UC + NT + Rm

TOT PANEL 57

[73] →

UC - Camel	9
Marl	55
WIN	28

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MINDBASE

	% of WIN	% of Overlap
Rm	23	19
NT	23	31
UC	13	23
MA	16	3
IN	12	7

Segment Topline

Rm ⇒ Core Loyal
Believe in Winston proposition
Strong perception of WIN as Natural and Smooth
Attracted to both AF & Escape
Lean towards simplification & passive escapism

NT ⇒ Average in terms of WIN brand usage
Within normal levels of being Core Loyal
Average affinity to AF & Escape
Lean towards stress relief & finding quiet time

UC ⇒ Trust the WIN brand
More inclined than other younger adult segments to see WIN as high quality
Far more likely than peers to recognize WIN as AF
Identify w/ both AF & Escape
Lean towards active escapism
Strongest potential long-term target

MA ⇒ Core Loyal
Not impacted by escapism theme
Moderately interested in AF
Not attracted to the brand by advertising
Drawn to actual properties of the cigarette
Consider WIN as light, smooth, and trust the brand
Prefer familiarity & routine - less apt to switch brands

IN ⇒ Average draw to WIN brand
Think fairly highly of WIN, think it's smooth & light tasting
Less likely to be swayed by marketing & advertising
Not at all attracted to Escapism; low-to-avg on AF
Interest in solitary activities, sensitivity to hype, fierce sense of independence

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MINDBASE

Winston buyers tend to be more mature mindsets   Rm , ma
Those most interested in Winston AF Cig tend to be

22% of total sample would buy a <u>WIN AF cig</u> (TZB)

<u>General</u>

- Strong ownership of AF & No Additives (vs. marl) ⟹ 20%
- Assoc. of AF/NA to Winston by segment
  - AF ⟹ high assoc. to WIN by IN , Rm
  - NA ⟹ "   "   "   "   "   IN , UC
                                  ideal
p.30 - Prospects want <u>"smooth"</u> as part of ^cigarette (overindexed to total & other groups)
- Core Loyal & WIN UBS want <u>"smooth"</u> as part of AF cig

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	Penl	WIN buyers	Core	Pros	Vul	AF ONLY	Escape ONLY	OVERLAP
Uc	20	13	10	18	17	19	25	23
NT	23	23	22	21	23	23	26	31
Rm	14	23	25	16	16	18	14	19
	57	59	57	55	56	60	75	73

Win buyers in Panel   9.0

T2B would buy Win AF cig   22.0

① Additudinal composition of Current Buyers   ⇒ Highly represented segments
                                                     Loyal groups → segment make-up of
                                                     Mindset topline of Key segments

③ Appeal of AF Cigarette   ⇒ Size of appeal
                                                     Which segments?
        Liklines to buy a cig being described as..."   Appeal by Loyal Group
                                                          ↳ Tie to equity study
              Liklines to buy WIN AF cig   ↳ trends by group
                    ↳ upside opportunity (now p.23)

② "AF" impact on product perceptions   ⇒ Attribute movement from "Ideal" to AF

④ Feelings / affinity towards Escapism   ⇒ Which segments have affinity to
   Passive vs. Active Escapism   ⇒ Leanings by key segments of interest
                                                     Leanings by Loyalty Groups
                                                     Self-descriptions by Loyalty Groups

⑤ AF / Escape Overlap   ⇒ Size of each one & overlap
                                                     Segment composition of each one & overlap
                                                     Mindset summary topline "   " "   "

⑥ Key Target Mindsets   ⇒ Which segments included
                                                     Each one's key highlights
                                                     Summary topline

   Additudinal Similarities & progression from UC → NT → RM
          ↳ general market opportunity
          ↳ Comparison of % of WIN to % of overlap

⑦ Who is this idea built for?   ⇒ Detailed profile summary of UC/NT/RM

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