

Emily
TRG

Camel Event/Relationship
Non-Event Test Vs. Control Cells
(Including Pre Wave)

Banner 1-Weighted
Banner 2-Unweighted

TRG#: 65-03062/03063
BIAD#: 03-13104

October, 2003

52972 1127

Oct 15th

Relationship
only

52972 1128

Note

Response rate (opt-in) was much lower than anticipate. → smaller bases sizes

CAMEL EVENT/RELATIONSHIP NON-EVENT TEST VS. CONTROL CELLS (Including Pre Wave)

REPORT

TRG #65-03062/03063
BIAD #03-13104

October, 2003

Prepared for:
R.J. Reynolds Tobacco Company

Prepared by:
Target Research Group

TRG

Clare - This report clearly shows that the event research reported in May/June was wrong in sample was wrong in the awareness results. The evidence

weighted tabs needed to contrast pre/control/test for post measures

unweighted to contrast optims vs. non-optims

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Background:

The Camel brand utilizes two main sources for its relationship marketing. The first is purchase of names and the second is name generation from Events sponsored by Camel.

- In the first case, purchasing names, it is necessary for the Direct program to establish the relationship.
- In the name generation at Events, the relationship has already begun. It is the role of Direct to build on it.

The Marketing Plan for 2003 has been dubbed "the year of the portfolio". The execution of this idea requires the breaking of an old paradigm. For many years, RJR and Camel have held to the idea that in order to facilitate a switch to a RJR brand, smokers must have two packs of the same product. The portfolio approach requires multi-packs -- but only one pack of a given style.

A small-scale study was fielded last December to evaluate the immediate impact of offering packs of the same product (focus) versus packs of the three lines (portfolio) of Camel. The learning from that study suggested that the portfolio was stronger because smokers learned more about Camel; and that, in turn, resulted in improved perceptions/attitudes toward the whole brand.

This Phase Of The Study:

This particular piece of research was proposed to assess the value of implementing a Direct program, comprised of three product mailers, to opt-in smokers who did not participate in an event.

Results are compared here in to those collected from a matched control sample that received only an opt-in kit. Both groups were called at the same point in time, approximately 6 weeks after the Test cell received their third mailer. The Test and Control cells are compared to a matched sample of smokers who were interviewed during a "Pre Wave" in April and then classified as opt-ins.

Objectives:

- To assess the impact of the Control and Test treatments within the Portfolio sampling strategy.

Methodology:

This was a two-cell test among opt-in smokers whose names were pulled from the RJR database or recently purchased.

- One cell was the Control cell who did not receive any mailings other than a white-card opt-in mailing.
- The other cell was the Test cell who received an opt-in offer followed by three product mailers prior to our phone call.

There were 253 completes for the Control cell and 301 completes for the Test cell.

Interviewing was conducted August 20th-September 8th, approximately 6 weeks following receipt of the final product mailer by each "batch" of smokers mailed.

Based on smoker information ^{per the database} available at the time, all names for this study were non-RJRT, full price who lived in non-restricted states. ^(Thus, Camel JB5 are in sample as expected)

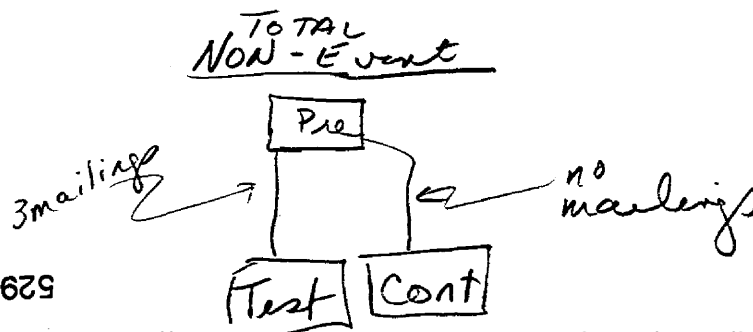
Information collected in the questionnaire included:

- Usual brand
- Second choice brand
- Occasional use brand
- Perceptions/Attitudes
- Recall of mailings/intercepts
- Future purchase intent by styles/line
- Awareness, trial and purchase of Camel lines of products
- Style differentiation
- Interaction within the total brand family

All Camel responses were drilled to the style level.

Sample:

- Sample for the Test, Control, and Pre cells were systematically pulled to ensure that they matched in terms of age and gender.



Pre-wave based on opt-ins only. ("white card concept")

Analytic Notes:

- Significance testing is shown at the 90% confidence level.
- The data for all three cells was weighted to ensure cell-to-cell comparability in terms of age within gender. (This was necessary since the Pre wave was conducted prior to the opt-in phase and those who eventually opted-in no longer matched the demographic profiles of the Test and Control cells.)
- Symbols Used:
 - @ = Caution: Small base.
 - * = Less than 0.5%.
 - ← = Significantly different from other cell in current phase of study
 - a-c = Significantly different from Control cell in pervious phase of study

RESPONDENT PROFILE
(After Weighting)

	<u>Pre</u>	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(221)	(253)	(301)
	<u>%</u>	<u>%</u>	<u>%</u>
<u>Gender</u>			
Male	53	53	53
Female	47	47	47
<u>Age</u>			
21-34	32	32	32
35-49	45	45	45
50-64	23	23	23
<u>Usual Brand On Sample</u>			
Marlboro	56	60	59
Other	44	40	41
<u>Education</u>			
Completed high school or less	59	57	61
Some college or more	39	40	36
Other education beyond high school	2	3	2

SUMMARY OF FINDINGS:

The Direct Mail flow that contained three "pack mailers" had a very positive affect on recipients:

- page 12 • The mailers were impactful. All but a few respondents recalled receiving them. (92% recall)
- " 27 • Awareness of the two line extensions improved appreciably, especially that of Exotic Blends. Both lines registered 90% awareness in the Test cell.
- ✓ 8 • All of the behavioral measures surpassed those of the Control and Pre cells.
- Recent purchase of all three Camel lines improved, with past 30 day purchase of the brand double that of the other cells.
 - Claimed usage of Camel surpassed that of the Pre read and, with 85% confidence, the Control cell.
 - With both components showing positive movement, Camel's buyer share rose to 24% --- from 10% in the Pre read and 13% in the Control cell.
- page 20 • The mailers also had a powerful affect on improving brand perceptions.
- Fourteen of the seventeen brand equity attributes increased --- averaging 16 percentage points higher than the Control cell.
 - Camel's uniqueness rating rose from 30% to 50%.
 - Future purchase intent increased for all three lines, with two-thirds saying they will buy one or more Camel styles in the future.
- After trying one pack from each line and being exposed to the mailer graphics and copy lines, smokers were still not clear as to which style was the most indulgent, the most mellow tasting or had the richest tobacco taste.
- pages 31-33 • Smokers who received the mailers were more likely to consider Exotic Blends to be the "More indulgent" style and less likely to consider it the style with the "Richest tobacco taste". The product point of difference for Turkish and the Base brand was less obvious to smokers, however, with the two styles getting comparable votes as having the more mellow taste or the richest tobacco taste.

Conclusion:

The Post fold strategy works very well for Camel. Despite no change in awareness of Classic (already in high 90's), exposure to Exotics + Turkish results in behavioral and attitudinal improvements for all three product lines. →

• Recent purchase (past 30 days) was almost doubled for Classic (from 12% to 20%), doubled for Turkish (from 6% to 14%), & quintupled for Exotics (2% to 11%)

• Buyer share for Total Camel doubled from 13% to 24% (with CJB growing from 5% to 9%)

• SOR for total Camel grew to 11% from 6%

• Future purchase intent grew by 17 percentage points for Classic; 12 percentage points for Exotics; and 13 points for Turkish

• Likelihood for Camel grew by 16 percentage points

• All important perceptions improved

SUMMARY OF KEY MEASURES

	<u>Pre</u>	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(221)	(253)	(301)
	<u>%</u>	<u>%</u>	<u>%</u>
<u>Camel Buyer Share</u>	<u>10</u>	<u>13</u>	<u>24^a</u>
CUB buyers	5	5	9 ^{a*}
Occasional buyers (last 10)	5	8	15 ^{ab}
Purchased in past 30 days	20	18	40 ^{ab}
Proven Conversion	1	1	2
Second choice brand	30	28	36 ^b
	(a)	(b)	(c)

*Significantly higher than Control cell at 85% C.L.

SUMMARY OF KEY MEASURES

(By Product Line)

	Pre Wave	Post Waves	
		Control	Test
<u>Base: Total Respondents</u>	(221)	(253)	(301)
	%	%	%
<u>Aware Of Product Line</u>	97	98	99 ^a
Turkish**	80	81	96 ^{ab}
Exotic	46	64	92 ^{ab}
Base	96	93	95
<u>Ever Purchased Line</u>			
Turkish	36 ^b	29	45 ^{ab}
Exotic	13	18	35 ^{ab}
Base	57	56	63
<u>Purchased Line In Past 30 Days</u>	20	18	40 ^{ab}
Turkish	6	6	14 ^{ab}
Exotic	3	2	11 ^{ab}
Base	13	12	20 ^{ab}
<u>Claimed Line As Usual Brand</u>	5	5	9 ^{a*}
Turkish	3	2	2
Exotic	--	--	*
Base	3	4	6 ^a
	(a)	(b)	(c)

**Excludes bogus style that was asked about

*Significantly higher than Pre and Control cells at 85% C.L.

DETAILED FINDINGS

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RECALL RECEIVING ITEMS FROM CAMEL IN MAIL IN PAST 3 MONTHS

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Recall Receiving Something From Camel</u>	<u>38</u>	<u>92^a</u>
Free pack(s) in the mail	5	71 ^a
Coupons	25	54 ^a
Brochure	11	14
Mailers/envelopes/boxes	3	3
An email	2	3
Other items	2	--
	(a)	(b)

PURCHASED CAMEL IN THE PAST 30 DAYS

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Total Camel Purchasers</u>	<u>18</u>	<u>40^a</u>
<u>Base Styles</u>	<u>12</u>	<u>20^a</u>
Lights	7	8
Filters/Regular	4	7
Ultra Lights	--	1
Wides	1	2
Menthol	*	*
Special Lights	1	*
Non-Filters	--	1 ^a
<u>Turkish Styles</u>	<u>6</u>	<u>14^a</u>
Jade	3	4
Gold	3	7 ^a
Royal	2	3
Exotic Blends	2	11 ^a
	(a)	(b)

CURRENT USUAL BRAND

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Camel</u>	<u>5</u>	<u>9*</u>
Base	4	6
Turkish	2	2
Exotic Blends	--	*
	(a)	(b)

*Significantly higher than Control cell at 85% C.L.

PREVIOUS USUAL BRAND

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Camel CUB's	(14) [@]	(27) [@]
	<u>%</u>	<u>%</u>
Marlboro	64	71
Winston	13 ^b	--
Kool	7	3
Newport	--	4
Basic	--	4
Benson & Hedges	--	4
Generic/store brand	--	4
Other	--	4
Didn't have previous usual brand	15	7
	(a)	(b)

LENGTH OF TIME CAMEL AS USUAL BRAND

	<u>Control</u>	<u>Test</u>
<u>Base: Camel CUB's</u>	(14) [@]	(27) [@]
	<u>%</u>	<u>%</u>
<u>Less Than 6 Months</u>	<u>21</u>	<u>27</u>
Within last month	6	9
1 month to less than 2 months	--	--
2 months to less than 4 months	15	11
4 months to less than 6 months	--	7
6 months to 1 year	22	15
<u>More Than 1 Year</u>	<u>50</u>	<u>55</u>
Over 1 year to 2 years	15	14
Over 2 years to 5 years	21	16
Over 5 years	14	25
Don't know	7	4
	(a)	(b)

SECOND CHOICE BRAND

	<u>Control</u>	<u>Test</u>
<u>Base</u> : Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Camel</u>	<u>28</u>	<u>36^a</u>
Turkish	6	7
Exotic Blends	3	5
Base	20	24
	(a)	(b)

CAMEL BUYER SHARE

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>CUB Buyers</u>	<u>5</u>	<u>9</u>
Core (9+)	4	5
Other (1-8)	2	4
<u>OU Buyers (last 10)</u>	<u>8</u>	<u>15^a</u>
Frequent (5+)	—	2 ^a
Infrequent (1-4)	8	13 ^a
 Total Buyers	 13	 24^a
	(a)	(b)

MEAN SHARE OF LAST 10 CIGARETTE PURCHASES

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Camel share of last 10 purchases	0.6	1.1 ^a
	(a)	(b)

MEAN SHARE OF LAST 10 CIGARETTE PURCHASES

	<u>Control</u>	<u>Test</u>
<u>Base: Camel CUB's</u>	(14) [@]	(27) [@]
	<u>%</u>	<u>%</u>
<u>Camel Share Of Last 10 Purchases</u>	<u>8.8</u>	<u>8.0</u>
Base	6.0	5.1
Turkish	2.6	2.4
Exotic Blends	0.2	0.5
	(a)	(b)

BRAND EQUITY
(% Saying Camel)

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Has a blend of Turkish and domestic tobaccos	76	87 ^a
Is a slightly exotic brand	62	81 ^a
Is a brand that offers a variety of unique and different flavors	61	79 ^a
Has a sense of humor	53	57
Is an innovative brand, always doing new things	41	60 ^a
Has more flavor than other cigarettes	34	48 ^a
Is a brand you hear a lot about	31	46 ^a
Is a brand that does fun and interesting things	30	45 ^a
Hosts events in bars and clubs	30	25
Has a mellow flavor	28	51 ^a
Is harsh tasting	28	24
Is smooth tasting	25	42 ^a
For smokers who want more pleasure out of life	23	38 ^a
Has a good overall taste	23	37 ^a
Has a pleasant aftertaste	21	38 ^a
Is one of the very best brands on the market	21	33 ^a
Is a brand that makes a statement about who I am	13	24 ^a
	(a)	(b)

FUTURE PURCHASE INTENT
(Top Two Box)

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>One Or More Styles</u>	<u>50</u>	<u>66^a</u>
Turkish	31	44 ^a
Exotic Blends	29	41 ^a
Base	35	52 ^a
	(a)	(b)

FUTURE PURCHASE INTENT OF CAMEL TURKISH

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>31</u>	<u>44^a</u>
Definitely will buy	12	15
Probably will buy	19	29 ^a
Might or might not buy	28	23
<u>Probably/Definitely Will Not Buy</u>	<u>40^b</u>	<u>32</u>
Probably will <u>not</u> buy	26 ^b	19
Definitely will <u>not</u> buy	14	13
Don't know	1	1
	(a)	(b)

FUTURE PURCHASE INTENT OF CAMEL EXOTIC BLENDS

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>29</u>	<u>41^a</u>
Definitely will buy	9	16 ^a
Probably will buy	19	25
Might or might not buy	27	22
<u>Probably/Definitely Will Not Buy</u>	<u>42</u>	<u>36</u>
Probably will <u>not</u> buy	25	21
Definitely will <u>not</u> buy	16	15
Don't know	3	1
	(a)	(b)

FUTURE PURCHASE INTENT OF BASE CAMEL

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>35</u>	<u>52^a</u>
Definitely will buy	12	21 ^a
Probably will buy	22	31 ^a
Might or might not buy	25 ^b	15
<u>Probably/Definitely Will Not Buy</u>	<u>38</u>	<u>32</u>
Probably will <u>not</u> buy	22	19
Definitely will <u>not</u> buy	17	13
Don't know	2	1
	(a)	(b)

CAMEL PROVEN CONVERSION

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Camel Usual Brand	5	9*
<u>Exclusions</u>	<u>4</u>	<u>7</u>
Last 10 Camel purchases 0-4/DK	*	1
Future PI to all 3 lines B3B/DK	--	*
Camel CUB on sample	4	5
Proven Conversion	1	2
	(a)	(b)

*Significantly higher than Control cell at 85% C.L.

CAMEL DIFFERENCE FROM OTHER BRANDS

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Extremely/Very Different</u>	<u>30</u>	<u>50^a</u>
Extremely different	9	20 ^a
Very different	21	30 ^a
Somewhat different	45	40
<u>Not Very/Not At All Different</u>	<u>17^b</u>	<u>5</u>
Not very different	10 ^b	4
Not at all different	7 ^b	1
Don't know	8 ^b	4
	(a)	(b)

CAMEL TURKISH STYLE AWARENESS

(Unaided/Aided)

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
Total Turkish (Excluding Amber)		
<u>Total Aware</u>	<u>81</u>	<u>96^a</u>
Unaided	50	60 ^a
Aided	68	84 ^a
Turkish Gold		
<u>Total Aware</u>	<u>67</u>	<u>86^a</u>
Unaided	14	20 ^a
Aided	53	66 ^a
Turkish Jade		
<u>Total Aware</u>	<u>43</u>	<u>68^a</u>
Unaided	9	15 ^a
Aided	34	54 ^a
Turkish Royal		
<u>Total Aware</u>	<u>34</u>	<u>57^a</u>
Unaided	5	10 ^a
Aided	29	47 ^a
Turkish (General)		
<u>Total Aware</u>	<u>38</u>	<u>40</u>
Unaided	38	40
Aided	--	--
Turkish Amber (Bogus style)		
<u>Total Aware</u>	<u>10</u>	<u>22^a</u>
Unaided	--	--
Aided	10	22 ^a
	(a)	(b)

CAMEL EXOTIC BLENDS AWARENESS
(Unaided/Aided)

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Total Aware</u>	<u>64</u>	<u>92^a</u>
Unaided	29	64 ^a
Aided	34	28
Camel Exotic Blends (General)	22	43 ^a
Mandarin Mint	4	10 ^a
Dark Mint	3	6
Crema	4	10 ^a
Twist	1	9 ^a
Izmir Stinger	2	6 ^a
Margarita Mixer	2	2
Aegean Spice	1	*
Mandalay Lime	*	--
Beach Breezer	*	*
Basma	--	*
Rare	--	*
Bayou Blast	--	--
	(a)	(b)

CAMEL STYLES EVER PURCHASED

	<u>Control</u>	<u>Test</u>
<u>Base</u> : Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Base	56	63
<u>Turkish</u> (Excluding Amber)	<u>29</u>	<u>45^a</u>
Turkish Gold	20	31 ^a
Turkish Jade	12	17 ^a
Turkish Royal	7	18 ^a
Exotic Blends	18	35 ^a
Turkish Amber (Bogus style)	1	1
	(a)	(b)

CAMEL STYLES EVER TRIED
(With Or Without Purchase)

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Turkish	42	77 ^a
Exotic Blends	28	79 ^a
Base styles	69	79 ^a
	(a)	(b)

CAMEL STYLE THAT IS "MORE INDULGENT"

*Class-
EB's are
indulgent*

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
The Exotic Blends	31	43 ^a ✓
		↑
The Base styles	27	23
	↑	
The Turkish styles	21	19
Don't know	21 ^b	15
	(a)	(b)

CAMEL STYLE THAT IS "THE MOST MELLOW TASTING"

*Mellow ideally
should be
Turkish, so this
reflects
configuration*

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
The Base styles	34	28
	↑	
The Turkish styles	19	24
	↑	↓
The Exotic Blends	11	30 ^a
Don't know	35 ^b	17
	(a)	(b)

Clare,

While we have different descriptors for each product line, perceptions are measured (via Tracker + elsewhere) as a total Camel family. So

CAMEL STYLE THAT HAS THE "RICHEST TOBACCO TASTE"

on most levels
This confusion of which style says what is really not a problem.

Consider these 3 charts as curiosity for Todd Holbrook.

Pick is a classic descriptor

Base: Total Respondents

The Base styles

The Turkish styles

The Exotic Blends

Don't know

<u>Control</u>	<u>Test</u>
(253)	(301)
<u>%</u>	<u>%</u>
29	33
25	33 ^a
↑	↑
11	17 ^a
35 ^b	17
(a)	(b)

LIKEABILITY OF CAMEL BRAND

	<u>Control</u>	<u>Test</u>
<u>Base: Total Respondents</u>	(253)	(301)
	<u>%</u>	<u>%</u>
<u>Like It A Lot/A Little</u>	<u>59</u>	<u>75^a</u>
Like it a lot	23	40 ^a
Like it a little	36	34
Neither like it nor dislike it	26 ^b	14
<u>Dislike It A Little/A Lot</u>	<u>6</u>	<u>8</u>
Dislike it a little	4	6
Dislike it a lot	2	2
Don't know	9 ^b	3
	(a)	(b)

RECALL RECEIVING FREE PACKS FROM REPRESENTATIVE IN PAST 9 MONTHS

	<u>Control</u>	<u>Test</u>
<u>Base:</u> Total Respondents	(253)	(301)
	<u>%</u>	<u>%</u>
Recall packs from bar representative	3	13 ^a
	(a)	(b)

COMPARISON OF OPTIN VS. NON-OPTIN AMONG PRE-READ RESPONDENTS

SUMMARY OF FINDINGS:

- A comparison of smokers who decided to complete and return the optⁿ form shows that they differ from those who did NOT opt in.

- Opt-in smokers...

- Are more likely to have purchased each of the three Camel lines for themselves
- Plan to purchase one or more styles of Camel in the future --- specifically a Turkish or Exotic Blend
- Consider Camel to be Unique
- Have higher Likeability scores for Camel
- Give Camel higher scores on 7 of the 17 Brand Equity attributes
- Are less likely to be Marlboro smokers (46% of opt-ins versus 76% of non-opt-ins)

- There are no real demographic differences between the two groups. — 50% of those smokers who opt-in are female. Thus, continued efforts will work to broaden the Camel franchise.

→ are somewhat more likely to be Savings smokers (18% for opt-in versus 5% for non-opt-in)

RESPONDENT PROFILE

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base:</u> Total Respondents	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Gender</u>		
Male	53	50
Female	47	50
<u>Age</u>		
21-34	39	39
35-49	45	46
50-64	15	15
<u>Usual Brand On Sample</u>		
Marlboro	85	82
Other	15	18
<u>Education</u>		
Completed high school or less	55	60
Some college or more	41	38
Other education beyond high school	4	2
	(a)	(b)

CURRENT USUAL BRAND

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Camel</u>	<u>4</u>	<u>6</u>
Turkish	1	3 ^a
Exotic Blends	--	--
Base	3	3
Marlboro	76 ^b	66
Other full price	14	15
Savings	5	10 ^a
International/other	1	3
	(a)	(b)

CAMEL BUYER SHARE

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>CUB Buyers</u>	<u>4</u>	<u>5</u>
Core (9+)	3	4
Other (1-8)	1	1
<u>OU Buyers (last 10)</u>	<u>6</u>	<u>5</u>
Frequent (5+)	1	1
Infrequent (1-4)	6	4
Total Buyers	10	10
	(a)	(b)

MEAN SHARE OF LAST 10 CIGARETTE PURCHASES

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base:</u> Total Respondents	(979)	(221)
	<u>%</u>	<u>%</u>
Camel share of last 10 purchases	0.5	0.6
	(a)	(b)

SECOND CHOICE BRAND

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base:</u> Total Respondents	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Camel</u>	<u>28</u>	<u>31</u>
Turkish	4	5
Exotic Blends	*	*
Base	24	26
	(a)	(b)

BRAND EQUITY
(% Saying Camel)

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
Has a blend of Turkish and domestic tobaccos	70	77 ^a
Is a slightly exotic brand	52	59 ^a
Is a brand that offers a variety of unique and different flavors	45	55 ^a
Has a sense of humor	41	44
Is an innovative brand, always doing new things	31	35
Has more flavor than other cigarettes	25	32 ^a
Is a brand you hear a lot about	31	30
Is a brand that does fun and interesting things	22	26
Hosts events in bars and clubs	24	19
Has a mellow flavor	20	24
Is harsh tasting	36	39
Is smooth tasting	20	28 ^a
For smokers who want more pleasure out of life	17	25 ^a
Has a good overall taste	16	19
Has a pleasant aftertaste	13	21 ^a
Is one of the very best brands on the market	15	19
Is a brand that makes a statement about who I am	13	14
	(a)	(b)

CAMEL STYLE AWARENESS
(Unaided/Aided)

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Total Turkish (Excluding Bogus style)</u>	<u>72</u>	<u>82^a</u>
Turkish Gold	62	70 ^a
Turkish Jade	36	44 ^a
Turkish Royal	25	28
Turkish (General)	27	29
Total Camel Exotic Blends	44	48
Standard Classic Camel	95	96
	(a)	(b)

CAMEL STYLES EVER PURCHASED

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
Base	50	57 ^a
<u>Turkish (Excluding Bogus style)</u>	<u>24</u>	<u>37^a</u>
Turkish Gold	19	28 ^a
Turkish Jade	8	15 ^a
Turkish Royal	6	12 ^a
Exotic Blends	8	14 ^a
	(a)	(b)

FUTURE PURCHASE INTENT OF CAMEL TURKISH

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>19</u>	<u>27^a</u>
Definitely will buy	4	5
Probably will buy	16	21 ^a
Might or might not buy	25	26
<u>Probably/Definitely Will Not Buy</u>	<u>55^b</u>	<u>48</u>
Probably will <u>not</u> buy	28	26
Definitely will <u>not</u> buy	27 ^b	22
Don't know	*	--
	(a)	(b)

FUTURE PURCHASE INTENT OF CAMEL EXOTIC BLENDS

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base:</u> Total Respondents	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>15</u>	<u>24^a</u>
Definitely will buy	3	6 ^a
Probably will buy	12	17 ^a
Might or might not buy	24	25
<u>Probably/Definitely Will Not Buy</u>	<u>60^b</u>	<u>50</u>
Probably will <u>not</u> buy	31	28
Definitely will <u>not</u> buy	29 ^b	23
Don't know	1	1
	(a)	(b)

FUTURE PURCHASE INTENT OF BASE CAMEL

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Definitely/Probably Will Buy</u>	<u>29</u>	<u>31</u>
Definitely will buy	9	9
Probably will buy	20	23
Might or might not buy	18	22
<u>Probably/Definitely Will Not Buy</u>	<u>53</u>	<u>47</u>
Probably will <u>not</u> buy	24	22
Definitely will <u>not</u> buy	28	25
Don't know	*	--
	(a)	(b)

FUTURE PURCHASE INTENT
(Top Two Box)

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>One Or More Styles</u>	<u>36</u>	<u>43^a</u>
Turkish	19	27 ^a
Exotic Blends	15	24 ^a
Base	29	31
	(a)	(b)

CAMEL DIFFERENCE FROM OTHER BRANDS

	<u>Non-Event Pre</u>	
	<u>Non- Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Extremely/Very Different</u>	<u>26</u>	<u>33^a</u>
Extremely different	7	11 ^a
Very different	19	22
Somewhat different	44	41
<u>Not Very/Not At All Different</u>	<u>21</u>	<u>18</u>
Not very different	14 ^b	10
Not at all different	7	9
Don't know	9	8
	(a)	(b)

LIKEABILITY OF CAMEL BRAND

	<u>Non-Event Pre</u>	
	<u>Non-Optin</u>	<u>Optin</u>
<u>Base: Total Respondents</u>	(979)	(221)
	<u>%</u>	<u>%</u>
<u>Like It A Lot/A Little</u>	<u>42</u>	<u>52^a</u>
Like it a lot	14	17
Like it a little	28	34 ^a
Neither like it nor dislike it	34 ^b	26
<u>Dislike It A Little/A Lot</u>	<u>15</u>	<u>16</u>
Dislike it a little	7	6
Dislike it a lot	8	10
Don't know	8	6
	(a)	(b)