

Student Marketing Institute

THE AMERICAN TOBACCO COMPANY CAMPUS CAMPAIGN

1954 - 1955

ANALYSIS OF

SURVEY OF STUDENT SMOKING

SIZE OF SMOKING SURVEY

<u>Campaign Colleges</u>	<u>Male Interviews</u>	<u>Female Interviews</u>	<u>Total Interviews</u>
147 White Colleges	17,228	6,983	24,211
37 Negro Colleges	2,282	1,411	3,693
	<hr/>	<hr/>	<hr/>
Total 184 Colleges	19,510	8,394	27,904
<u>Non-Campaign Colleges</u>			
77 Colleges	5,306	2,865	8,171
	<hr/>	<hr/>	<hr/>
Total Survey 261 Colleges	24,816	11,259	36,075

NOTE: There are 275 individual colleges in the Survey, since 16 individual White Colleges have been grouped into 8 White Campaign Colleges and 9 individual Negro Colleges have been grouped into 3 Negro Campaign Colleges. In all, 25 individual colleges have been grouped into 11 Campaign Colleges - raising the total Colleges in the Survey from 261 to 275.

GENERAL SURVEY ANALYSIS

1. **LUCKY STRIKE** is the leading brand in the total campaign colleges and **PALL MALL** is second.
2. **LUCKY STRIKE** and **PALL MALL** are also first and second respectively in non-campaign colleges, but with a smaller share of market than at the campaign colleges.
3. Despite the **DECREASE** in the Regular Size Market, **LUCKY STRIKE** share of this market **INCREASED 5.4%**.
4. The King Size Market **DECREASED .7%**, **PALL MALL**, however, **INCREASED** its share of this market by **5.1%**. Of particular significance is the fact that in the Negro market, **PALL MALL** is now the most popular cigarette with **24.1%** of the total cigarette market, **1.0%** higher than its nearest competitor, Philip Morris, King and Regular combined.
5. There is a tremendous increase in the smoking of Filter Tip brands. Filters have increased from **8.5%** of the total market from the survey of last year to **21.6%** this year. **FILTER TIP TAREYTON** has **1.0%** of the total market and **4.4%** of the Filter Tip Market. Viceroy is again the dominant brand.
6. This increase in the Filter Tip Market has come mainly from the Regular Size brand market which had a decrease of **13.1%**.

LUCKY STRIKE

LUCKY STRIKE is again the choice of Regular Size brands by students at campaign colleges with 48.1% of the Regular Size market. This brand is also first with total male smokers of Regular Size brands (48.7%) and total female Regular Size smokers with 43.7% of Regular Size brands. See Table and Graph - pages 7 and 8.

Male and female preferences of **LUCKIES** is even split at White colleges. At Negro colleges, **LUCKIES** are preferred by 11.5% more male than female Regular size smokers.

PALL MALL

PALL MALL is again the choice of King Size brands by students at campaign colleges with 65.1% of the King Size market. This brand is also first with male and female student smokers of this size with 63.0% and 68.5% respectively. This ratio is approximately the same in both White and Negro colleges. See Table and Graph - pages 7 and 8.

FILTER TIP TAREYTON

FILTER TIP TAREYTON is the fifth most popular Filter Tip brand nationally with 4.4% of the total Filter Tip market. See Table and Graph - pages 7 and 8.

Particularly significant is that in both White and Negro colleges, Viceroy, the most popular Filter Tip brand with 43.1% of the Filter Tip market is preferred by more female Filter Tip smokers (53.2%) than male smokers (31.8%), while Winston, the second most popular Filter Tip brand with 26.2% of the Filter Tip market, is preferred by more male Filter Tip smokers (31.5%) than female smokers (21.5%).

INDIVIDUAL BRAND STANDINGS BY SIZE AND TYPE MARKET

REGULAR SIZE BRANDS

Brand	% of Total Regular Size Market	% of Total Male Regular Size Smokers	% of Total Female Regular Size Smokers
Brand A LUCKY STRIKE	48.1%	48.7%	45.9%
Brand B Chesterfield	21.9	21.0	27.7
Brand C Camel	15.7	16.5	10.0
Brand D Philip Morris	9.7	9.2	13.2

KING SIZE BRANDS

Brand	% of Total King Size Market	% of Total Male King Size Smokers	% of Total Female King Size Smokers
Brand A FALL MALL	65.1%	63.0%	68.5%
Brand B Chesterfield	21.3%	22.2	19.8
Brand C Philip Morris	6.0	7.1	4.2
Brand D Herbert Tareyton	3.1	2.9	3.6

FILTER TIP BRANDS

Brand	% of Total Filter Tip Market	% of Total Male Filter Tip Smokers	% of Total Female Filter Tip Smokers
Brand A Viceroy	43.1%	31.8%	53.2%
Brand B Winston	26.2	31.5	21.5
Brand C L&M King	12.6	13.9	11.4
Brand D L&M Regular	6.3	8.9	4.0
Brand E FILTER TIP TAREYTON	4.4	4.4	4.4

These figures are presented in graph form on the following pages.

1954-1955 Survey Results

Total Market

<u>Group</u>	<u>Regular</u>	<u>King</u>	<u>Filter</u>
1A-- White Campaign	44.1	30.0	20.7
1B-- Negro Campaign	33.5	36.0	27.6
Total 1A & 1B	42.7 (55.8)**	30.7 (31.4)	21.6 (8.5)
2 Non-Campaign	43.1	29.2	23.8

Regular Market1A -- White Campaign Groups

	<u>Total Mkt.</u>	<u>Regular Mkt.</u>
Lucky Strike	22.2 (25.2)	50.3
Chesterfield	10.4 (13.5)	23.6
Camel	7.1 (10.3)	16.1
Philip Morris	2.4	5.4

1B -- Negro Campaign Groups

Philip Morris	15.6 (31.9)	46.7
Lucky Strike	10.0 (13.6)	29.9
Camel	3.9 (6.7)	11.8
Chesterfield	2.3 (3.4)	6.8

Total 1A and 1B

Lucky Strike	20.5 (23.8)	48.1 (42.7)
Chesterfield	9.3 (12.2)	21.9
Camel	6.7 (9.8)	15.7
Philip Morris	4.2	9.7

2 -- Non-Campaign

Lucky Strike	19.1	44.4
Chesterfield	11.0	25.7
Camel	7.7	17.9
Philip Morris	2.8	6.4

** Figures in () indicate 1953-1954
Survey Results

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King Market1A- White Campaign Groups

<u>Brand</u>	<u>Total Mkt.</u>	<u>King Mkt.</u>
Fall Mall	19.4 (19.3)	64.7
Chesterfield	7.3 (6.8)	24.3
Philip Morris	1.0	3.3
Herbert Taroyton	.9 (1.7)	3.0

1B- Negro Campaign Groups

Fall Mall	24.1 (15.0)	66.9
Philip Morris	7.5 (9.7)	20.9
Chesterfield	1.8 (1.7)	4.9
Herbert Taroyton	1.3 (1.3)	3.5

Total 1A and 1B

Fall Mall	20.0 (18.8)	65.1 (60.0)
Chesterfield	6.5 (6.1)	21.3
Herbert Taroyton	1.0 (1.6)	3.1
Philip Morris	1.8	6.0

2- Non-Campaign

Fall Mall	18.2	62.4
Chesterfield	7.4	25.4
Herbert Taroyton	1.1	3.6
Philip Morris	.9	3.2

Filter Market1A

Viceroy	8.0 (5.3)	39.0
Winston	5.6	27.4
L&M King	3.0	14.4
L&M Reg.	1.5	7.1
Herbert Taroyton	.9	4.3

1B

Viceroy	17.4 (6.0)	63.0
Winston	5.6	20.4
Herbert Taroyton	1.4	4.9
L&M King	1.1	3.9
L&M Reg.	.6	2.2

Total 1A and 1B

Viceroy	9.2 (5.4)	43.1
Winston	5.6	26.2
L&M King	2.7	12.6
L&M Reg.	1.4	6.3
Herbert Taroyton	1.0	4.4

<u>Brand</u>	<u>Total Mkt.</u>	<u>Filter Mkt.</u>
Viceroy	10.6	44.4
Winston	5.4	22.6
LEM King	3.4	14.4
LEM Reg.	1.5	6.4
Herbert Tareyton	1.0	4.8

Total Market Standings - All Brands

<u>Negro & White Colleges Combined</u>		<u>White Colleges</u>		<u>Negro Colleges</u>	
LUCKY STRIKE	20.5%	LUCKY STRIKE	22.2%	PALL MALL	24.1%
PALL MALL	20.0	PALL MALL	19.4	Philip Morris R.	15.6 23.1
Chesterfield Reg.	9.3 15.8	Chesterfield Reg.	10.4 17.7	Philip Morris K.	7.5
Chesterfield King	6.5	Chesterfield King	7.3	Viceroy	17.4
Viceroy	9.2	Viceroy	8.0	LUCKY STRIKE	10.0
...		
HERBERT TAREYTON	1.0	HERBERT TAREYTON	.9	HERBERT TAREYTON	1.3
FILTER TIP TAREYTON	1.0	FILTER TIP TAREYTON	.9	FILTER TIP TAREYTON	1.4

LUCKY STRIKE and PALL MALL are still first and second nationally as they were last year. But for reasons explained on the previous page each size and type cigarette should be compared with its own individual market.

Analysis of Question #5

"What activities - if any - have you noticed by cigarette brands on your campus during the current year (since September 1954)?"

This question is a check of the various activities conducted by American Tobacco Company and competitive brands cigarettes, from September 1954 through April 1955.

The results prove that The American Tobacco Company Campus Campaign made more of an impression on students at campaign colleges than did the campaigns conducted by other brands.

An analysis of activities follows:

Advertising in Campus Publications

A total of 81.1% of the student respondents remembered seeing cigarette advertising of some sort in their college publications. In individual brands, LUCKY STRIKE ranked first with 56.2% of the students remembering and specifying LUCKY STRIKE seen as the brand advertised. Chesterfield was second with 35.6%. Philip Morris was third with 28.1%, Camel fourth with 21.7%, Winston fifth with 15.5%, PALL MALL sixth with 11.6%, Viceroy seventh with 7.0%, FILTER TIP TAREYTON eighth with 6.0% and Old Gold and Cavalier with 5.5% each.

At White campaign colleges, 84.3% of the respondents remembered seeing cigarette advertising. Of this group, 59.0% of the students remembered and specified LUCKIES as the brand seen advertised. Chesterfield was second with 36.8%, Philip Morris third with 29.1%, Camel fourth with 21.5%, PALL MALL was sixth with 9.9% and FILTER TIP TAREYTON tenth with 4.6%.

At Negro campaign colleges, 60.2% of the students recognized and remembered some sort of advertising, since there is less advertising in Negro publications. A total of 38.3% remembered and specified LUCKIES. Chesterfield was second with 27.3%. Camel and PALL MALL were tied for third with 23.0%. FILTER TIP TAREYTON was sixth with 14.6%.

This analysis shows that in all groups, students responding to the advertising section of this question indicated that they remember LUCKY STRIKE advertising over all other brands advertised in college publications and that PALL MALL and FILTER TIP TAREYTON were also well remembered.

PALL MALL was not advertised in college publications. However, all brands were included in the survey questionnaire. The interviewer in recording the students' responses, could only record what the student thought he remembered seeing.

Campus Radio

This section of Question #9 has been broken down into three groups. The first group, all inclusive, consists of 55 colleges where LUCKY STRIKE paid advertising purchased through Eastern States Radio Corporation and the Ivy Network is heard over campus radio stations and all campuses where SMI Representatives have tied in with campus stations. The second group consists of 78 colleges where American Tobacco Company paid advertising is broadcast but at which there are no SMI tie-in programs. The third group consists of 27 colleges where there is both paid advertising and SMI tie-ins.

Of the first group, 26.6% of the students indicated that they had heard LUCKY STRIKE advertising over their campus station. Of the second group, 26.0% of the respondents heard LUCKY STRIKE advertising. Of the third group, where both paid advertising and SMI tie-ins** were broadcast, 31.4% of the respondents heard LUCKY STRIKE advertising.

This data points up that at campaign colleges where SMI Representatives have secured program tie-ins at stations broadcasting paid advertising for The American Tobacco Company, the percentage of students who indicated that they had heard LUCKY STRIKE advertising increased by 5.4% over those colleges where only paid advertising was broadcast.

Sampling

A total of 64.8% of the student respondents remembered receiving cigarette samples of some brand during the year. Again, LUCKY STRIKE was first, with 41.5% of the respondents. Winston was in second position with 41.4%. Chesterfield combined was in third position with 35.3%. PALL MALL was in fourth position with 28.5%. Camel was fifth with 18.0%, then Cavalier with 16.4%, Old Gold with 12.6%, Philip Morris with 11.5% and FILTER TIP TAREYTON with 7.0%. Viceroy was last with 2.4%.

This correlates closely with campaign instructions which directed Representatives to sample competitive smokers by size and type. The Regular size market is 42.7%, King size market 30.7% and the Filter Tip market 21.6%, however Campus Representatives had a limited number of FILTER TIP TAREYTON samples and only for the last two months of the campaign.

At White Campaign Colleges, 64.3% of the total respondents remembered receiving cigarette samples of some brand during the year. Winston was first with 39.6%, LUCKY STRIKE was second with 39.3%, Chesterfield combined was third with 35.2%, PALL MALL fourth with 25.5% and FILTER TIP TAREYTON was remembered by 5.6%

* Questions were not received from two additional schools at which American Tobacco Company broadcasts paid advertising.

** The tie-ins were additional radio time secured by the Campus Representatives for a few cartons of LUCKY STRIKE 20's.