
Agenda Item 9(iii)
Lucky Strike
Sons of Anarchy Campaign

502590030

LUCKY STRIKE

05-10-1993 15:20

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BWI's Analysis of the 2 Campaigns

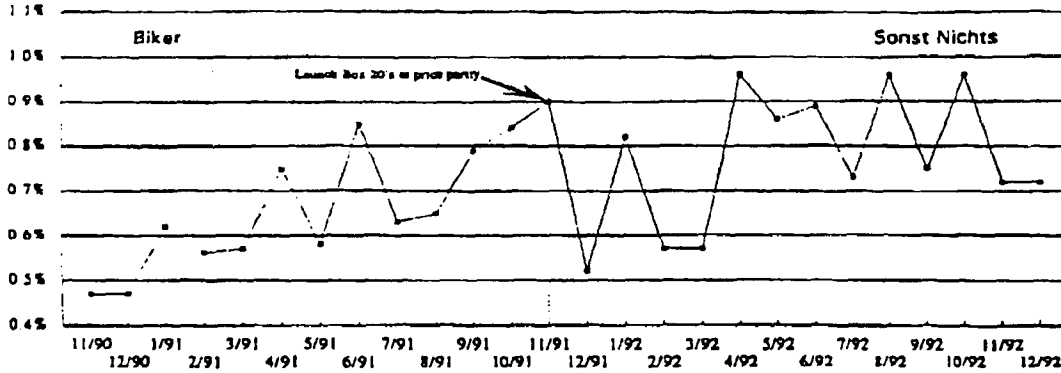
INTERNATIONAL

P.02

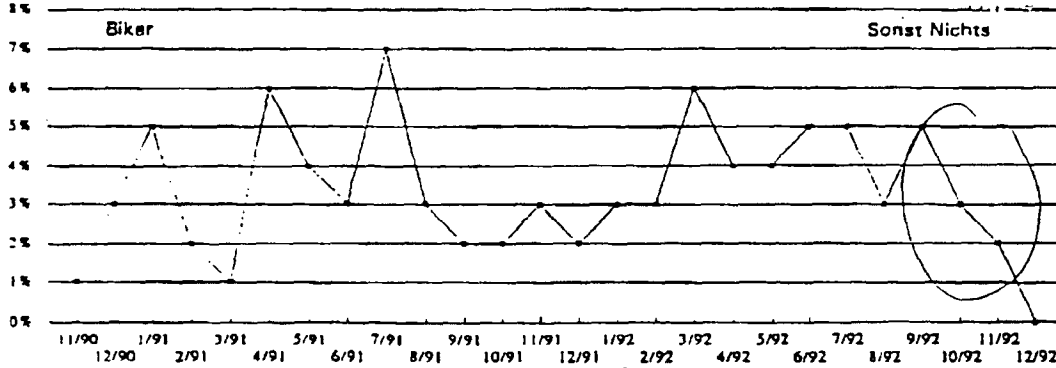
LUCKY STRIKE - Biker/Sonst Nichts

Holland

Share of Market

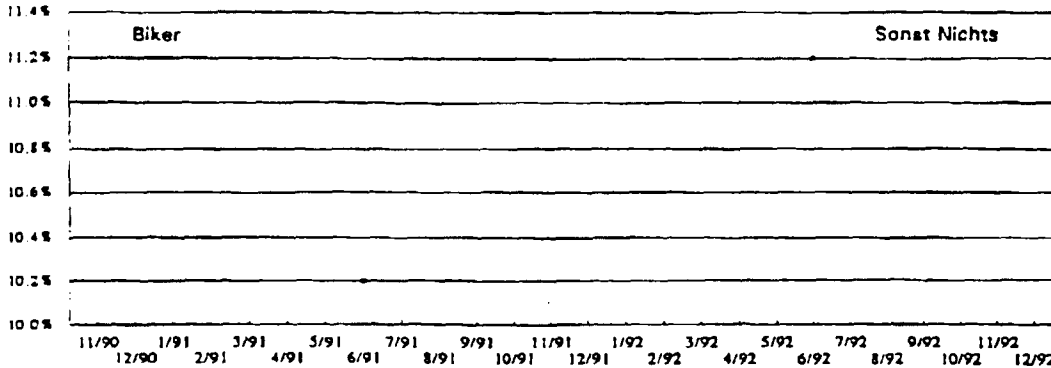


Unaided Advertising Awareness



+ these figures are for the total smoker population * have been queried *

Share of Voice



* Graph actually shows 1 percentage point increase only

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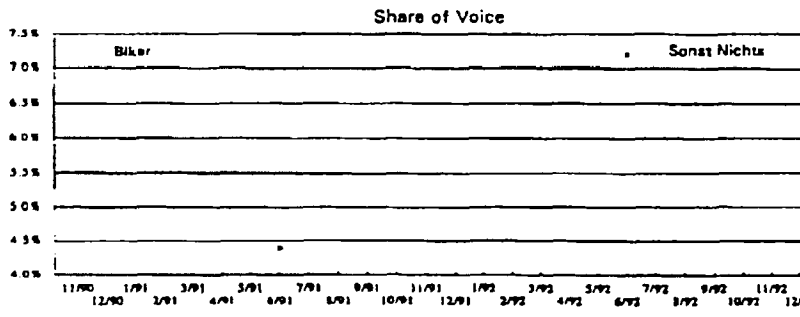
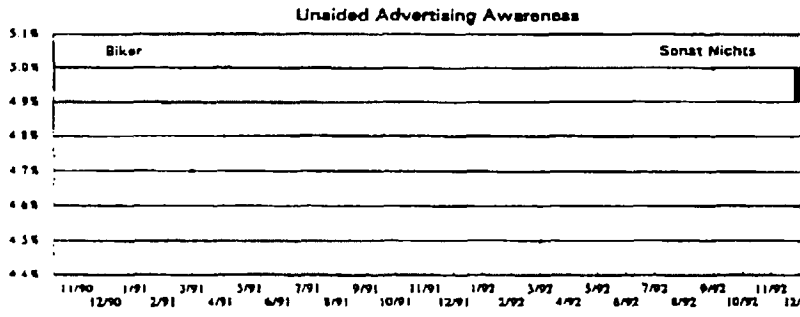
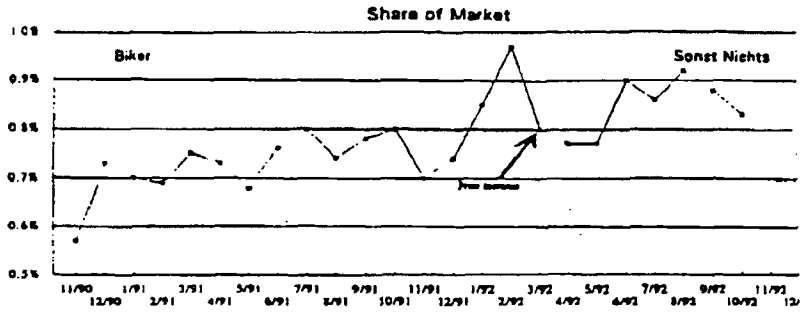
LUCKY STRIKE - Biker/Sonet Nichts Holland

AVERAGES	BIKER 90 Nov-91 Oct	SONST NICHTS 91 Nov-92 Dec	Var
Volume (M)	8,441	10,275	21.7%
SOM	0.65%	0.78%	0.13
Unaided Advertising Awareness	3.3%	3.4%	0.2

SUPPORT	1991	1992	Var
Mkt Spend \$MN	5.6	6.1	8.9%
SOV	10.2%	11.2%	1.0

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LUCKY STRIKE - Biker/Sonst Nichts Switzerland



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LUCKY STRIKE - Biker/Sonst Nichts **Switzerland**

AVERAGES	BIKER 90 Nov-92 Feb	SONST NICHTS 92 Mar-92 Oct	Var
Volume (M)	9,881	11,750	18.9%
SOM	0.75%	0.84%	0.09
Unaided Advertising Awareness	4.7%	4.8%	0.1

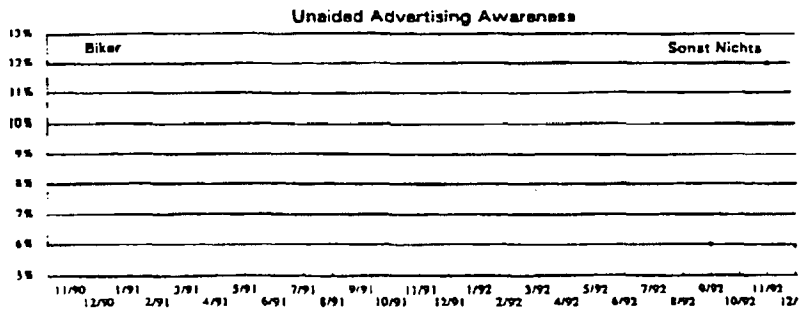
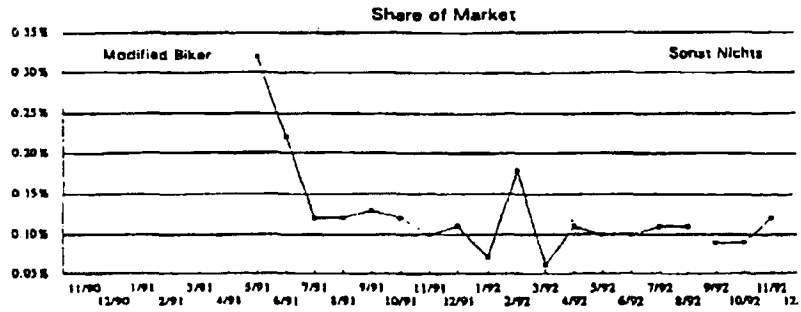
SUPPORT	1991	1992	Var
Mkt Spend \$MN	5.6	6.2	10.7%
SOV	4.4%	7.2%	2.8

NOTE: Prior to March 1992, Lucky Strike price point was .20 Swiss Francs below Marlboro.

Since March 1992, Lucky Strike price point has been .10 Swiss Francs below Marlboro.

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LUCKY STRIKE - Biker/Sonet Nichts Denmark



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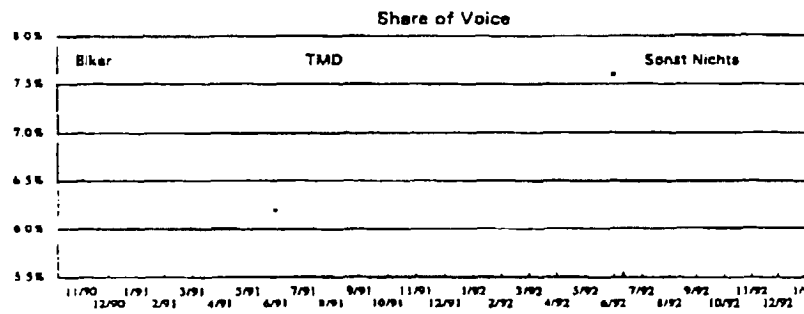
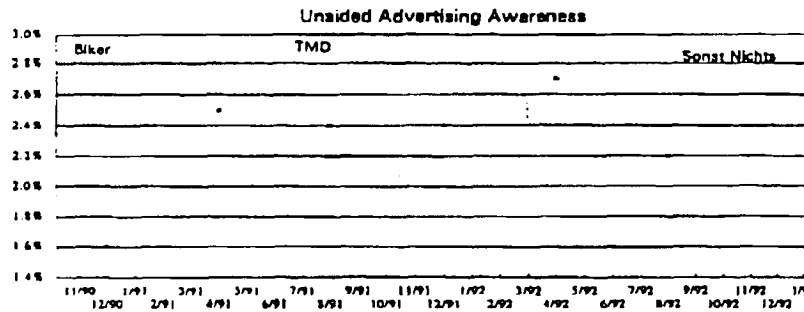
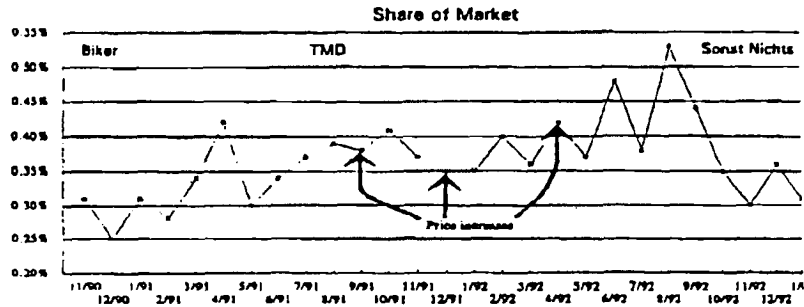
LUCKY STRIKE - Biker/Sonst Nichts Denmark

AVERAGES	BIKER 91 May-92 Feb	SONST NICHTS 92 Mar-92 Nov	Var
Volume (M)	828	553	-33.3%
SOM	0.15%	0.10%	-0.05
Unaided Advertising Awareness	N/A	9.0%	N/A

NOTE: Price always at parity.

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LUCKY STRIKE - Biker/TMD/Sonat Nichts Belgium & Luxembourg



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LUCKY STRIKE - Biker/TMD/Sonst Nichts Belgium & Luxembourg

AVERAGES	BIKER + TMD 90 Nov-92 Feb	SONST NICHTS 92 Mar-93 Jan	Var
Volume (M)	5,042	5,590	10.9%
SOM	0.35%	0.39%	0.04
Unaided Advertising Awareness	2.2%	2.5%	0.2

SUPPORT	1991	1992	Var
Mkt Spend \$MN	2.7	3.9	44.4%
SOV	6.2%	7.6%	1.4

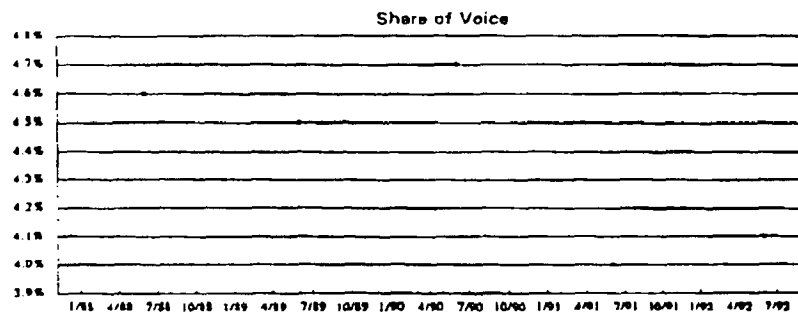
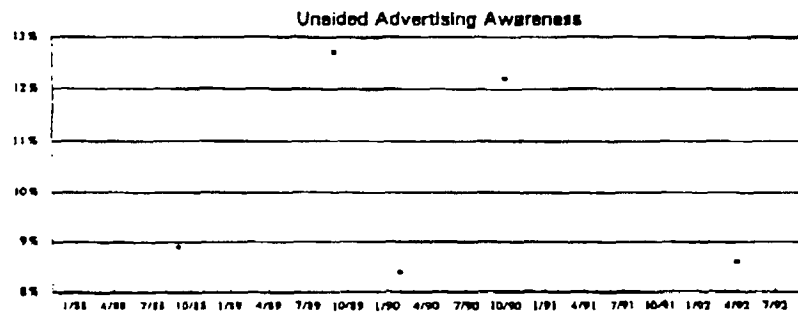
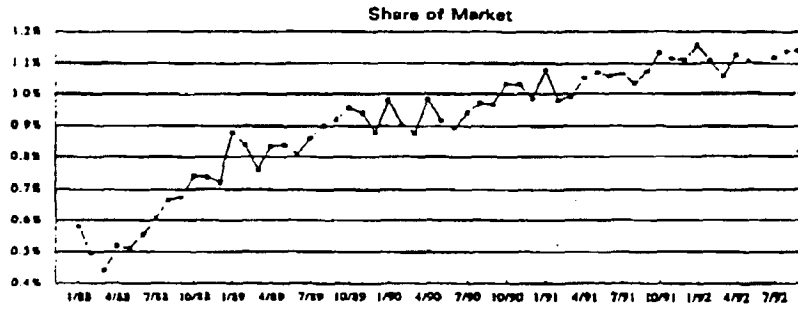
NOTES:

- Price point differential between Lucky Strike and Marlboro was 5 Belgium Francs prior to September 1991.
- September 1991 price differential decreased to 3 Belgium Francs.
- December 1991 price differential decreased to 2 Belgium Francs.
- April 1992 achieved parity.

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LUCKY STRIKE - Biker

Japan



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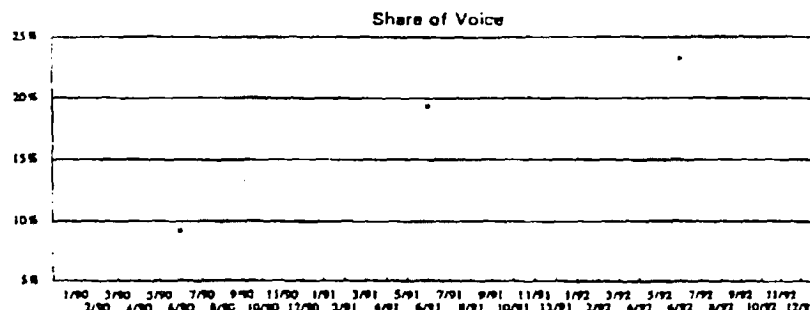
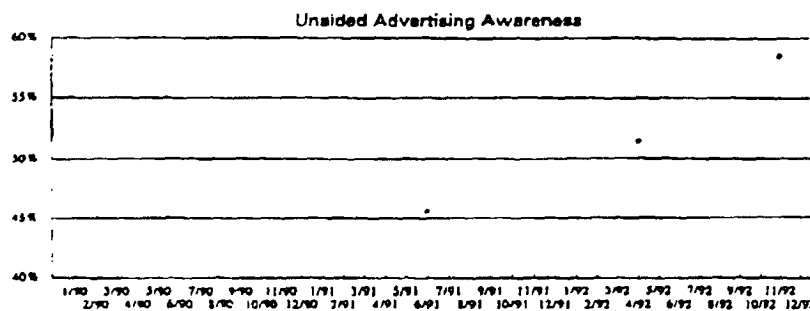
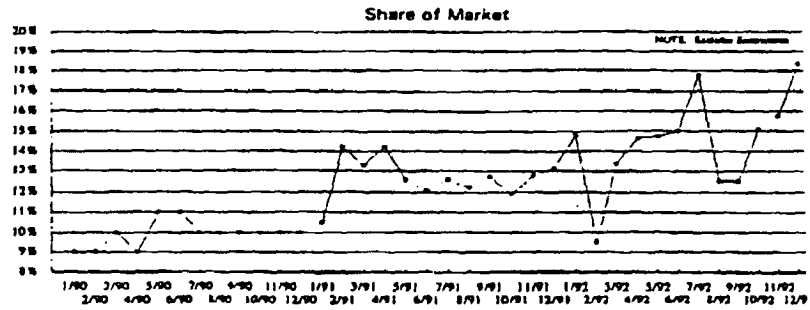
LUCKY STRIKE - Biker Japan

AVERAGES

Volume (MM)	242
SOM	0.91%
Unaided Advertising Awareness	10.7%
SOV	4.4%

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LUCKY STRIKE - Biker Paraguay



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LUCKY STRIKE - Biker

Paraguay

AVERAGES

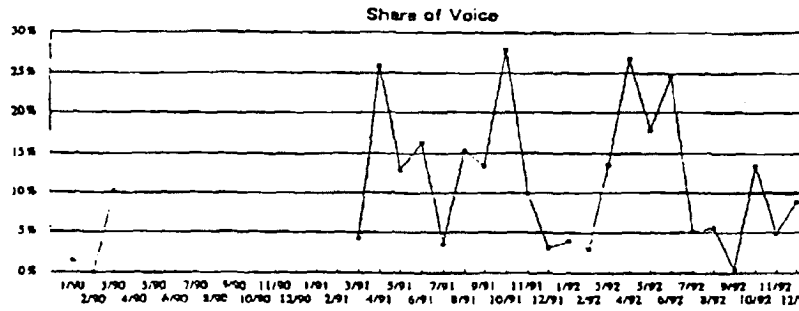
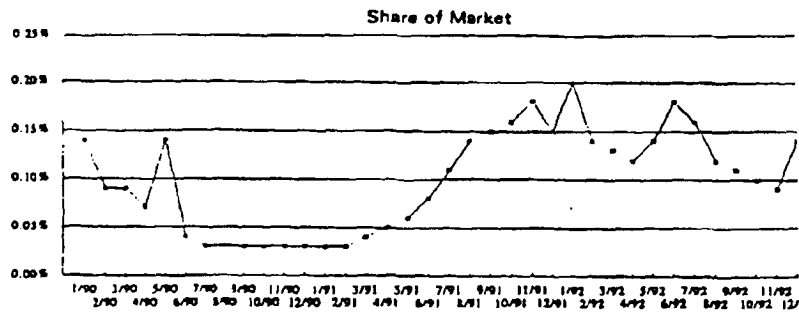
Volume (M)	32,202
SOM*	12.38%
Unaided Advertising Awareness	61.9%

* Estimated Estimate

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LUCKY STRIKE - Biker

Brazil



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LUCKY STRIKE - Biker Brazil

AVERAGES

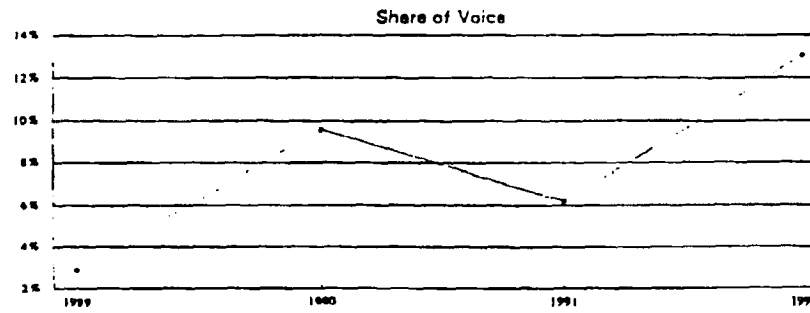
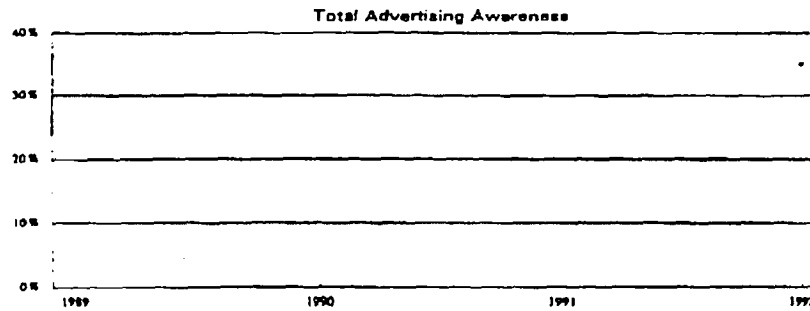
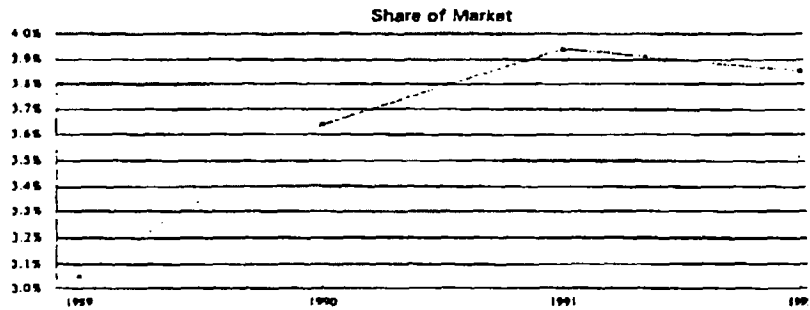
Volume (MM)	11.3
SOM	0.10%

SUPPORT	1990	1991	1992
SOV	3.9%	13.2%	10.7%

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LUCKY STRIKE - Biker

Spain



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LUCKY STRIKE - Biker Spain

AVERAGES

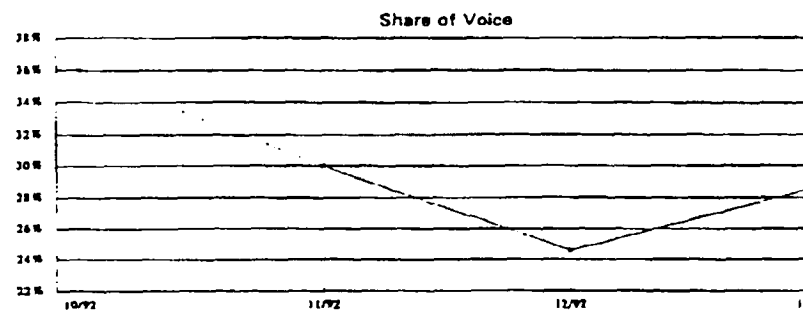
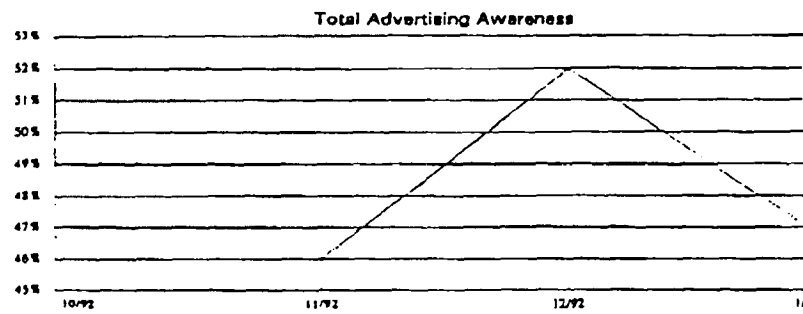
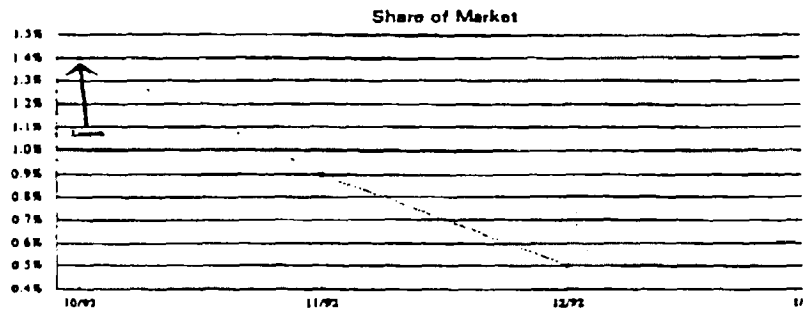
Volume (MM)	246
SOM	3.6%
Total Advertising Awareness	35.0%

SUPPORT	1989	1990	1991	1992
ISOV	2.9%	9.6%	6.2%	13.1%

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LUCKY STRIKE - Biker

Venezuela



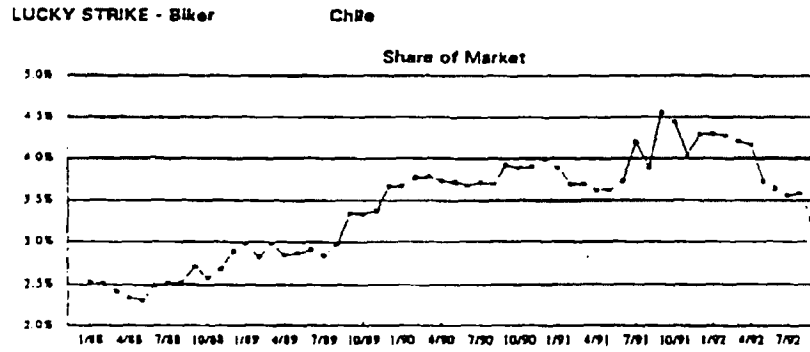
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LUCKY STRIKE - Biker Venezuela

AVERAGES

SOM	0.83%
Unaided Advertising Awareness	48.3%
SOV	29.8%

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INTERNATIONAL

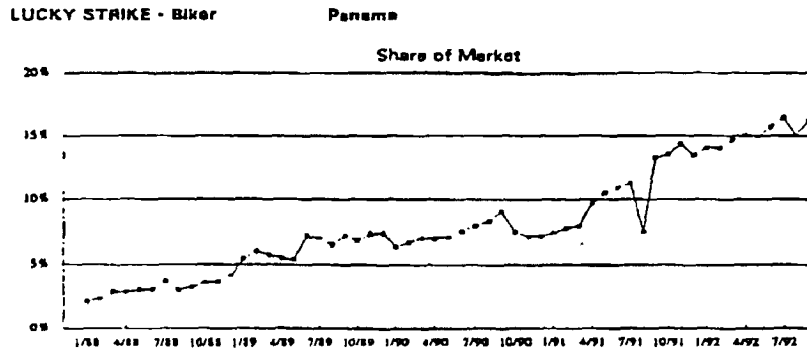
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LUCKY STRIKE - Biker CH16

AVERAGES

Volume (M)	29,038
SOM	3.43%

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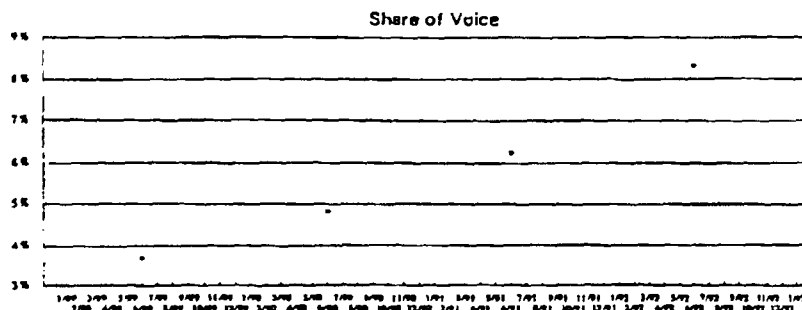
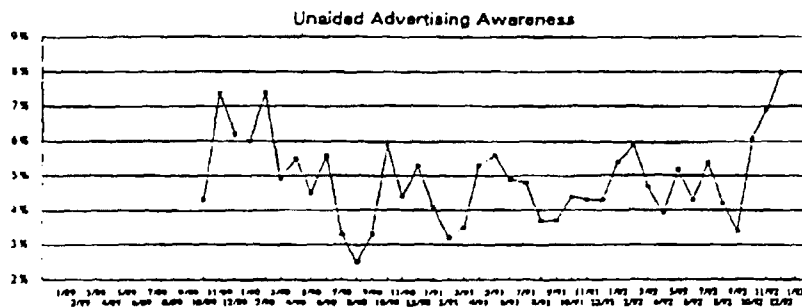
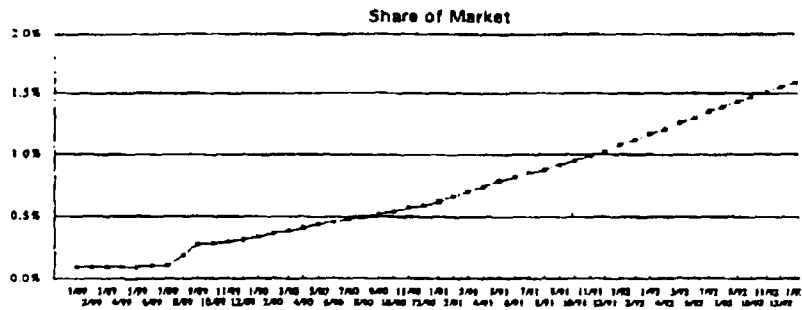
LUCKY STRIKE - Biker Panama

AVERAGES

Volume (M)	4,818
SOM	8.22%

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LUCKY STRIKE - Sonst Nichts West Germany



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LUCKY STRIKE - Sonet Nichts West Germany

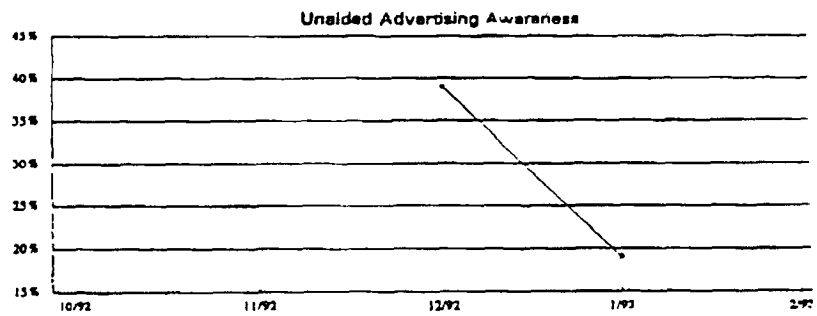
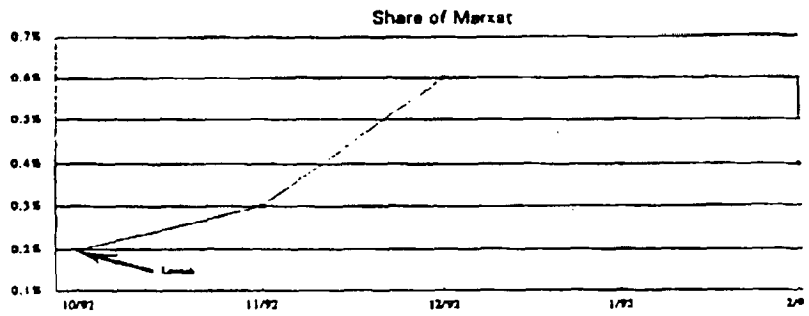
AVERAGES

SOM	0.72%
Unaided Advertising Awareness	4.9%

SUPPORT	1989	1990	1991	1992
Mkt Spend Million DM	12.2	18.4	23.1	27.6
SOV	3.69%	4.83%	6.28%	8.33%

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LUCKY STRIKE - Sonet Nichta Argentina



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LUCKY STRIKE - Sonst Nichts Argentina

AVERAGES

SOM	0.38%
Unaided Advertising Awareness	29.0%

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