

## THE MARLBORO SUCCESS STORY

### Background

Marlboro has been the prime cigarette success story in the United States for the past three decades. Today more than one out of every five smokers uses Marlboro. Given Marlboro's high penetration among young adult smokers, indications favor continued success for the brand.

The key question is what gave Marlboro its initial success. The brand was introduced as a woman's cigarette, with a red tip so that lipstick marks wouldn't show. How did Philip Morris manage to so change the image that Marlboro is now seen as the epitome of masculinity while it continues to grow dramatically?

The success of Marlboro traces to three elements: appropriate advertising; a superior product; and consistency throughout.

### Appropriate Advertising

Although Marlboro started as a feminine brand, starting in 1954 it became the first cigarette brand to have a true masculine image.

There was a need for this strong masculine image to overcome the past. Not only did Marlboro used to be for women, with the aforementioned red mouthpiece, but the brand was an early filter. Filters at the time were described by Leo Burnett as "sissy". Real men didn't smoke filter tipped cigarettes. Advertising for filters focused on everything from dancing packages to endorsements by dentists, nothing particularly masculine. To counteract this heritage, Marlboro had to utilize the most masculine image that could be found.

Marlboro sold masculinity in 1954 by being the first brand to use "real men" versus the prior models. And what men! They showed football players, cowboys, airplane pilots, and sailors. These were tough, real men, who in no way resembled the models of the past. These were the first "slice of life" aspirational ads ever seen by the cigarette smoking American man.

The ads were not just masculine, but were single-mindedly masculine. They portrayed manly, rugged men doing manly, rugged jobs. There was a high degree of sex appeal also associated with all advertising at this time, as television advertising featured Julie London - one of the sexiest women of the time - singing the Marlboro theme song. The clear implication was that if one smoked Marlboro, one could obtain a woman like Julie.

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The Marlboro advertising was overtly masculine, but had an easy sale as it was in accord with the key media of the time. In the mid to late 1950's in the United States there were over fifty cowboy shows on television in any week. These cowboy shows were preceded and followed by hard-bitten private detectives, pilots, military and war shows, and other "macho" forms of entertainment. Sports programming was just beginning, and live football games enjoyed huge audiences. How appropriate that interrupting these cowboys were the Marlboro cowboy; interrupting the football game was the Marlboro football player; interrupting the WWII drama was the Marlboro sailor. And don't forget that Julie London, a key popular singer of the day, was singing the Marlboro theme throughout.

Marlboro was also the right advertising in the right place. The decades beginning with the late 1950's were becoming more and more turbulent. America's involvement in the War in Vietnam was beginning to heat up. Flower Power was beginning in the country. Women were rebelling against their traditional place in American life. The pill and birth control, and the concomitant upheaval in sexual mores, were introduced. There was confusion, especially on the part of the young men, who were looking for roll models through the media for the first time. Into this time of conflicting values came the Marlboro man, a strong simple image presenting a key message for the young. The young responded. They liked and aspired to be like this simple, masculine image, rising above the turmoil of the country into a well-defined role in the new society.

#### Superior Product

When Marlboro was reintroduced in 1954 it had a flip-open box. This was a new development, and was advertised in all media as a real point of difference. The key word "fresher" was used in most advertising, implying a tighter seal with less drying out than was found in soft-cup packages of the major competitors. This also allowed the cigarette to retain a mild character over a period of time. And this new flavor character was mentioned in the advertising, from the tag lines of the initial campaign through the "better makin's" recipe campaign of 1958.

This mild character in a smooth, mellow cigarette, was critical to Marlboro's success. The reality was in direct contrast with the rugged image of the advertising "hero", but it was an appropriate contrast. The times were just beginning to appreciate light and natural items, health foods and low calories were just being introduced, and Marlboro came in with a cigarette that promised macho but delivered mild. The young male smokers, not yet ready for the harsh taste of the major competition, could project their manliness while smoking a cigarette they could tolerate.

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Note that while the cigarettes were mild and mellow, they were not weak. Marlboro had a unique combination of full-flavored rich taste and mellow/smooth feel.

That brings up perhaps the major point in favor of Marlboro's product. Marlboro has maintained product superiority since at least the mid-1950's. While the blend is different, and not universally liked (thus the continued success of Winston, Viceroy, et al) the rich/mellow dichotomy was monitored and continued to be preferred versus competitive products, especially among the critical younger male target audience.

#### Consistency Throughout

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Marlboro retained its consistent masculine image throughout periods of dramatic change in the tenor of American life. There was minor evolution in the specific creatives used, from the various role models used in the introductory campaigns of the mid-50's, through the older "macho" man/younger woman used briefly in 1958, with the cowboy seen as more important through the 1950's and 1960's. By 1974 the cowboy had replaced the other male role models, but this change was more in the specific model used than in the overall character of the proposition. In fact, the Marlboro man, personified by the cowboy, had become so well known that by the mid to late 1970s the brand was able to keep the lifestyle cues of horses and country without needing to show the cowboy himself; the lifestyle was becoming as important - if not more important in its conjuration of simpler rugged times - than the man himself.

The Marlboro proposition thus remained single-minded from the mid-1950's to the present. Marlboro was a rugged, masculine smoke throughout the liberal/conservative foment of the 1960's and 1970's. Marlboro was consistent through changes in media; in fact the cowboy (and other real men) represented one of the few campaigns that worked as well in print as it did on television.

The proposition also remained consistent through the brand and style proliferation of the last twenty years. Marlboro did not jump on the bandwagon of lights, 100s, or ultras. If a new style looked promising, Philip Morris introduced a new freestanding brand to take advantage of it. A new style of Marlboro was only introduced after that style was generally accepted throughout the country. Additionally, when Marlboro did introduce a new style the advertising proposition did not change. If one were to eliminate the occasional words "now available in...", it would be impossible to discern if the advertising were for the parent style or one of the new offerings.

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While the entire value structure of life in America was changing, Marlboro was unique in its consistency. The proposition worked. The reason the proposition worked were still valid. The proposition was not changed.

The product also remained consistent over time. The original parent style has been available since 1954. Even when other styles were introduced, they were introduced only after mass acceptance (including acceptance by men) in a packaging format consistent with that of the parent.

The final point on product consistency is Marlboro's quality control over time. Not only has product superiority over competition been maintained, but internal quality and batch control have been continually monitored. While there is one Marlboro, Philip Morris monitors and changes the blend so that the product smoked by the eventual consumer is consistent, regardless of season or geographic location.

#### Conclusion

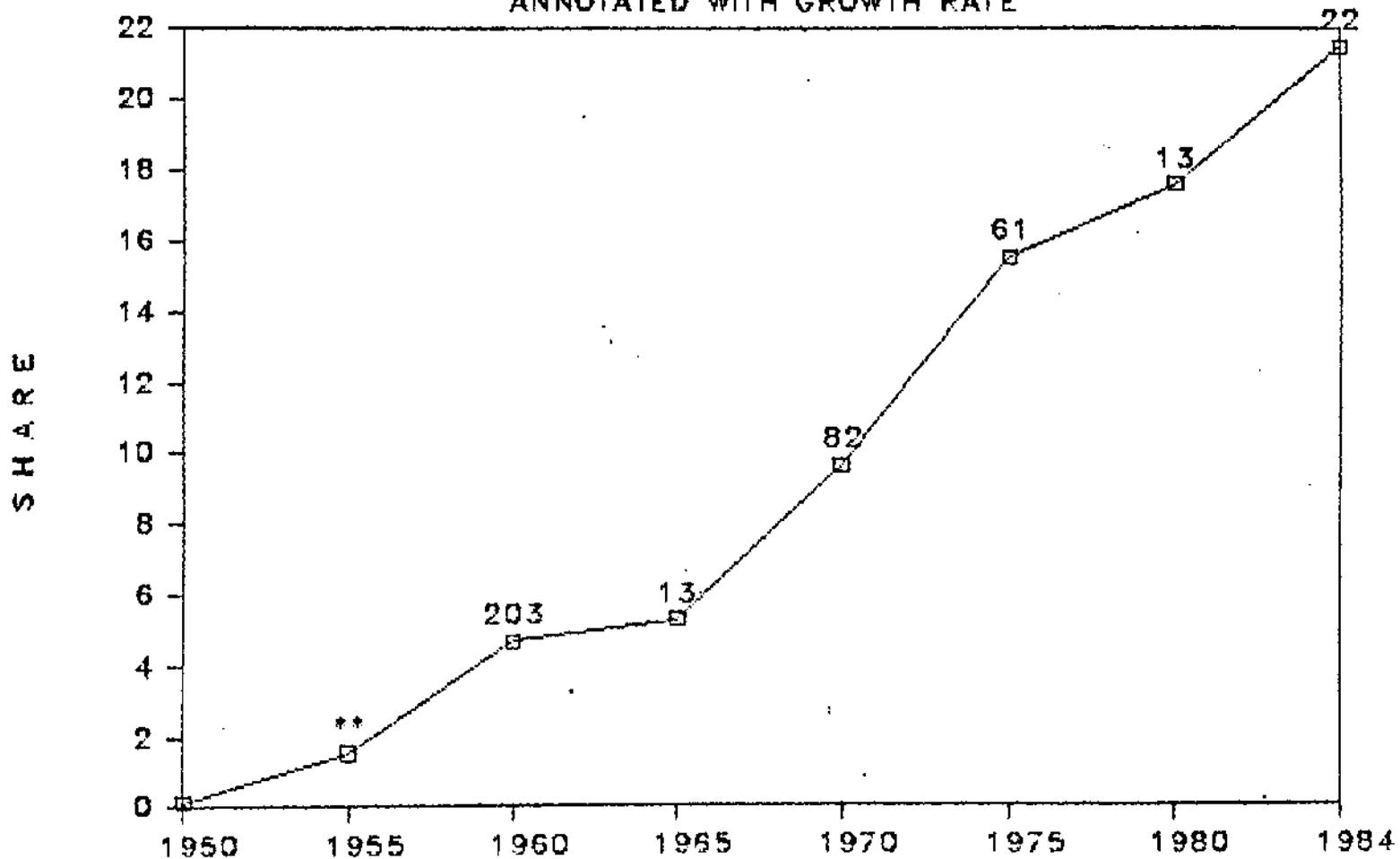
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Marlboro was in the right place at the right time. The world, led by young men, was ready for a rugged, masculine cigarette that was mild to smoke. Marlboro delivered and, perhaps most importantly, made no unneeded changes in a working formula.

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# MARLBORO SHARE OF MARKET

ANNOTATED WITH GROWTH RATE



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DEMOGRAPHIC PROFILE  
MARLBORO FAMILY  
 (INDEXED TO TOTAL SMOKERS)

	<u>1984</u>	<u>1983</u>	<u>1982</u>	<u>1981</u>	<u>1980</u>
<u>GENDER</u>					
MALE	126	126	126	125	125
FEMALE	76	76	76	74	75
<u>AGE</u>					
UNDER 25	254	254	249	240	226
25-44	108	108	110	109	108
OVER 44	37	35	38	41	35
<u>INCOME</u>					
LESS THAN \$15,000	104	100	100	99	100
\$15,000 - \$29,999	102	102	103	108	103
OVER \$30,000	93	97	96	86	92
<u>CONSUMPTION</u>					
LESS THAN ONE PACK/DAY	115	110	102	108	109
ABOUT ONE PACK/DAY	104	104	105	102	102
MORE THAN ONE PACK/DAY	87	86	90	92	90
<u>RACE</u>					
WHITE	103	103	104	104	103
*BLACK	22	18	18	27	26
*OTHER	115	100	92	83	83

\*CAUTION-SMALL BASES

SOURCE: SWITCHING STUDY

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MARLBORO FAMILY  
(INDEXED TO TOTAL SMOKERS)

	<u>1984</u>	<u>1983</u>	<u>1982</u>	<u>1981</u>	<u>1980</u>
<u>OUTFLOW</u>					
QUITTERS*	95	99	106	108	104
SWITCH OUT*	68	64	65	63	74
<u>LOYAL</u>	103	103	102	103	104
<u>INFLOW</u>					
SWITCH WITHIN	13	16	18	24	24
SWITCH IN	42	39	43	48	44
STARTERS	185	182	185	142	139
<u>RESTARTERS</u>	109	113	115	--	--

\*INDEXED OVER FORMER SMOKERS

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MARLBORO

INFLOW/OUTFLOW

MARLBORO (FAMILY)

	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>
<u>INFLOW</u>	Winston Not Reported KOOL	Winston Not Reported Salem Camel KOOL	Winston KOOL Not Reported	(Not Reported) Winston KOOL
<u>OUTFLOW</u>	Winston Merit Camel BARCLAY Salem	Merit Winston Camel B&H	Winston Generic Merit	Winston Generic Merit Camel

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