

RESEARCH PAPER

The Australian cigarette brand as product, person, and symbol

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Objective: To examine, for dominant Australian cigarette brands, brand identity (overriding brand vision), brand positioning (brand identity elements communicated to the consumer), brand image (consumers' brand perceptions) and brand equity (financial value).

Design: Tobacco industry documents, articles from retail trade publications since 1990, and current brand advertising from retail trade publications were searched for information about Australian brands.

Results: Cigarette manufacturers benefit from their competitors' brand equity as well as their own. The industry sees Australian smokers as far less brand loyal and strongly oriented to "low tar". A few predominantly local brands dominate the market, with variation by state. Successful Australian brands exist in one of three categories: premium, mainstream, and supervalue. Their brand identity essence is as follows. Premium: quality. Mainstream: a good humoured "fair go" for ordinary Australians. Supervalue: value for money. All supervalue brand identities also include freedom, escape, mildness, an aspirational attitude, blue tones, and waterside scenes. Brand image and brand identity is frequently congruent, even when marketing is restricted, and brand image is generally more positive for a smoker's own brand.

Conclusions: Tobacco control activities have undermined cigarette brand equity. Further research is needed regarding brand loyalty, low tar, and brand categories. Smokers may respond more positively to tobacco control messages consistent with the identities of their chosen brand, and brand-as-organisation elements may assist. Further marketing restrictions should consider all elements of brand identity, and aim to undermine brand categories.

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This paper discusses the cigarette brands that are currently important in the Australian market, and the process by which the tobacco industry has attempted to make those brands meaningful for consumers. Australia is a highly restricted marketing environment for tobacco brands. Federal Australian law has made most forms of tobacco marketing illegal, starting in 1976 and reaching a watershed in the (Federal) Tobacco Advertising Prohibition (TAP) Act 1992.¹ On a background of existing television, radio and cinema bans, the TAP Act prohibited print advertising, domestic sponsorships and billboards, with some notable exceptions, particularly "internationally significant" sponsorships, which cease in 2006, and brand advertising in the retail trade press.

The "brand"

The "brand" is a fundamental, dominant, and constantly evolving concern in marketing.^{2–31} Despite agreement on the importance of "brands", what constitutes a "brand" is contested.¹⁴ Although the "brand" is sometimes defined simply as a "logo, trademark or package design",^{5 11 12 18 29} many authors emphasise that a brand is far more, particularly more recently and in resources for marketing practitioners.^{3 4 22 25 28}

Brand image

In the 1950s and 1960s, marketing focused on concrete, novel product benefits, and the brand was considered to be merely an identifier.^{6 7 13 32} A highly original 1955 paper, "The product and the brand",¹⁶ posited that a "brand" was more: a complex symbol that built up a body of associations over time, and thus communicated ideas, attributes, image, character, and personality to consumers. With prescience, its authors foreshadowed a fundamental contemporary distinction between the product, a concrete object produced in a factory, and the brand, an abstract construct in the mind

of the consumer which is independently important to sales.^{5 8 9 14 16 28 33} That paper inspired David Ogilvy to champion the idea of "brand image" or "brand personality" in the 1970s, often embodied as spokesperson characters for the brands he advertised.^{7 13 17} The "brand image" concept is still important, now generally defined as the associations with or perceptions of the brand in the mind of consumers.^{4 5 11 15 17}

Brand positioning

In the 1980s "positioning" rose to prominence. The "position" of a product was also a place in consumers' minds, but it was a place relative to competing products.^{4 7 11 12} The "positioning statement" concept is still current in marketing,^{10 12 29} defined by Aaker as "the part of the brand identity and value proposition that is to be actively communicated to the target audience...[to] demonstrate an advantage over competitor brands".^{3 4} The value proposition is defined as "a statement of the functional, emotional and self-expressive benefits delivered by a brand that provide value to the consumer",^{3 4} and brand identity will be discussed shortly.

Brand equity

A dichotomy between "brands" and "commodities" underlies the brand concept. When consumers choose "commodities" they do so on the basis of price.^{3 9} Brand building is seen to liberate products from this dependence on price alone by creating lasting value in the mind of the consumer.^{3 6 9 11 20} It is widely acknowledged that this added value, together

Abbreviations: BATA, British American Tobacco Australia Limited; PMI, Philip Morris International; PML, Philip Morris (Australia) Limited; TAP Act, Tobacco Advertising Prohibition Act; TPM, total particulate matter

with a positive consumer experience of the product, can justify a price premium, influence sales levels, increase stock values, and improve profits.^{2-5 9 10 19 20}

In corporate acquisitions in the 1980s huge prices began to be paid for brands, over and above the value of their manufacturing facilities.^{10 11} This brought “brand equity”, the financial value of brands, to prominence, a concept that became increasingly important in the 1990s.^{10 15} Although there is much disagreement about how it should be measured,¹⁰ brand equity is seen to arise from other aspects of the brand, including brand awareness, brand imagery, brand loyalty, consumers’ attitudes to the brand, perceived quality, brand associations, and patents and trademarks.^{3-5 11 12 18} It can be influenced by major new products, product problems, management changes, competitor actions, and legal actions.³

Brand identity

Later work emphasises the notion of a “brand identity”, defined by the brand manager and determining all aspects of a brand’s marketing.^{3 4 10} Brand identity is complex and potentially arises from many elements (table 1).³ It is idealised, creative, and dynamic, a vision, purpose, and meaning for a brand, encapsulating the brand’s values and determining the associations made with the brand.^{4 10} Identity differs from brand image, which exists in the consumers’ mind and is only partly determined by brand identity, and from positioning, which expresses only some aspects of a brand’s identity and benefits.^{4 10} Aaker identifies three parts of brand identity. “Brand essence” is “a single thought that captures the soul of the brand”, what it is or what it does. Brand identity “core” consists of a few brand elements which summarise the brand’s vision. Extended brand identity consists of “elements that provide texture and completeness”.^{3 4}

METHODS

This paper drew on three sources: tobacco industry documents, articles from retail trade publications, and brand advertising from retail trade publications.

Tobacco industry documents came from world wide web sites established following litigation in the USA.³⁴ Documents came from the primary sites of cigarette manufacturers,³⁵ the Council for Tobacco Research,³⁶ and the US Tobacco Institute,³⁷ and the secondary sites of Tobacco Documents Online (Bliley, BC, Health Canada and Guildford Miscellaneous collections),³⁸ the Canadian Council for Tobacco Control site,³⁹ the British Columbia Ministry of Health Services site,⁴⁰ and the Center for Disease Control and Prevention Guildford site.⁴¹ The search string (pagewood or moorabbin or granville or australia or sydney or melbourne or brisbane or hobart or adelaide or perth or canberra or amatil or wills) has been used throughout the project to gather

documents relating to the Australian market. Six hundred and ninety two of these, identified and annotated throughout the course of the project, contained information about Australian cigarette brands, including brand strategies, presentations, and consumer research. These are available from <http://tobacco.health.usyd.edu.au/site/gateway/docs/research.htm>. An overview of the approach to document searching and analysis used during the project is available elsewhere.⁴²

The three main trade journals—*Australian Retail Tobacconist*, *Retail World*, and *Australian Service Station and Convenience Store News* (pre November 2001)/*Australian Convenience Store News* (post November 2001) were searched by hand. Searching started from 1990 because the brand makeup of the Australian market changed enormously at that time and the aim of this paper was to explore brands which are currently important in Australia. All articles and corporate advertisements that mentioned tobacco products or companies were copied. A particularly important source was the ACNielsen review of the top 100 brands in the Australian grocery market published annually in *Retail World*, which provides a brief description of brand positioning. In addition, all advertisements placed by Philip Morris Limited (PML), British American Tobacco Australia Limited (BATA) or Imperial Tobacco Limited for ready made cigarettes in the same retail journals between January 2001 and June 2003 were colour copied. This information was only analysed quantitatively, tabulating the occurrence of advertisements across the three publications, the number of pages they occupied, their place in the journal (cover or page number), and whether they featured a brand variant labelled “light”, “mild” or ≤ 8 mg tar.

The aim was to understand the Australian cigarette brand identities from the tobacco industry’s point of view, thus a materialist, intersubjective position guided analysis.^{43 44} All text sources were used the same way: information about Australian brands was annotated verbatim, organised chronologically, and then grouped iteratively into emergent themes. This paper is not an exhaustive explanation of brands in the Australian market, but a condensed reflection of the information opportunistically available from industry and retail sources.

RESULTS

Brand loyal

While Australian cigarette brand loyalty exceeds loyalty to other product brands, Australian smokers are seen to be less brand loyal than, for example, US or UK smokers. Industry documents from the 1970s to the 1990s state that the Australian market is volatile and characterise Australian smokers as both commonly smoking more than one brand and readily switching brands.⁴⁵⁻⁴⁹ A 2002 BATA advertisement in *Retail World*, solely intended to convince shopkeepers to minimise out-of-stocks, supports this notion: the most

Table 1 Potential components of brand identity. Adapted from Aaker⁴

Elements of brand essence, core identity, and extended identity			
Brand as product	Brand as organisation	Brand as person	Brand as symbol
Association with product class (e.g. cigarettes)	Organisation attributes (e.g. innovation, trustworthiness)	Personality (e.g. feminine, rugged)	Visual imagery and metaphors
Product attributes (e.g. taste) Quality/value Uses Users Country of origin	Local versus global	Brand-customer relationships (e.g. friend)	Brand heritage

dramatic warning BATA could muster, based on their “general consumer survey”, was that 43% of smokers would go elsewhere if their regular brand variant was out of stock, 28% would reportedly buy a different variant, and 22% a different brand.⁵⁰ Although not directly comparable, findings from other markets, such as an American finding that only 9.5% of smokers switched brands in a year,⁵¹ suggest that Australian brand loyalty may be relatively low.

Regional variation

The Australian market is highly regionalised. To quote David Metcalf of WD&HO Wills (Wills, member of the British American Tobacco Group): “it varies by state... Australia is really amazing—it’s almost like separate countries.”⁵² Although this makes market research more difficult, it also provides marketing opportunities.^{47 53 54} Apart from Escort, which has approximately one quarter of the convenience market in South Australia but a negligible share in other states,⁵⁵ the same few brands occupy different positions in the share data for different states. In the convenience market in the last quarter of 2002, for example, Winfield was the leading brand in Western Australia, NSW, and Victoria, with 35.0%, 34.0%, and 25.1% value share, respectively, but was third in Queensland at 18.9% and fifth in South Australia with 9.0%.⁵⁵ In 1986, Sydney, the biggest city market, was characterised as image based, rejecting deep discounting; Melbourne, the next biggest, as value based, responding more positively to discounting, although this pattern is not clear in current brand share data.⁵⁶

Local branding

Since the 1970s successful brands have been those, like Winfield, Peter Jackson, and Longbeach, which were given distinctly Australian brand identities, and by the mid 1980s the local industry formally recognised that Australian smokers were resistant to international brands.⁵⁷⁻⁶¹

Diversification within existing brand families

Another fundamental phenomenon in Australia has been increasing mildness. The “low TPM segment” has been a priority for Australia since the mid 1970s because it attracts “health conscious smokers”, enhances quality perceptions, and assists smokers to deal with the declining social acceptability of smoking. Over time “mildness” has become essential to Australian brands, and is most acceptable when provided as a line extension—that is, a new variant of an existing product under the same brand.^{12 53 62-77} Frequently “mildness” is expressed not just through variant names, but through pack changes, generally through the use of paler and/or bluer colour.

By the early 1990s, industry documents referred to the Australian market as the “mildest in terms of average delivery”,⁷³ and to the “dramatic downward shift of T/N (tar/nicotine) deliveries of Australian products”⁷⁴ as a “key dynamic” of the market.^{73 75} By 1994, Henry Goldberg of PML argued: “for some years now, there have been three kinds of new products launched in Australia; mild extensions; price propositions; and failures. We don’t intend to launch a new price brand unless provoked. Not surprisingly then, we have plans for even lower tar versions of all of our major brands.”⁷⁸

Australian brand identities thus needs to be particularly robust, capable of resonating through up to eight or 10 variants. Machine-read tar is objectively relatively meaningless because smokers are able to compensate to adjust for product design changes,⁷⁹ and the industry’s own consumer research showed that smokers had minimal understanding of what “low tar” actually meant.⁶⁶ However, industry research also showed that smokers experienced “lowered tar” as a real sensory phenomenon, influenced in part by the brand family

Table 2 Brands currently being advertised in the Australian retail trade press

	International brand	Predominantly Australian brand
Premium	Benson & Hedges; Dunhill Kent* (stand alone “low tar”†); Lucky Strike*; Marlboro; Peter Stuyvesant; West*	Alpine (stand alone menthol)
Mainstream		Escort (South Australia); Peter Jackson; Winfield (now exported)
Supervalue		Holiday; Horizon; Longbeach; Stradbroke

*Currently minimal brand share.
 †In most instances in Australia functional benefits such as mentholation or “low tar” are offered as line extensions within existing brand families. Stand alone products are distinct brands positioned on such a functional benefit.

and the tar band printed on the pack.⁸⁰ Manufacturers raced to lower the tar banding of their important brands both to maintain loyalty by enabling trade-down over time within one brand family, and to attempt to steal share from competitor brands by getting to a “tar point” first.^{77 81}

Other Australian tobacco control research confirms that, in the current market, when a brand moves into a lower pack count, for example, it tends to do so in a wide range of tar variants.⁸² Retail trade publications show that the 5–8 mg “medium” tar band currently has the highest share and is the industry’s priority. Line extensions in recent years have included B&H Lights 6 (1997); Marlboro Medium (8 mg, 2001); and Winfield Light Blue Special Mild 6 (2003), and supervalue products offer vast “lights” choice: Longbeach, for example, is in Filter, Mild, Super Mild, Ultra Mild, Ultimate, 1 mg, Menthol, and Menthol 2 mg. Retail trade publication advertising is dominated by images of packets of cigarettes labelled “light”, “mild” or 8 mg tar or below, even when the advertisements are for the entire brand family. What was once “low tar” is an increasingly “regular” offering, reinforcing “mildness” as an intrinsic brand characteristic.

Premium, mainstream, supervalue

The Australian cigarette market is far simpler than the complex matrix of brands available internationally.⁸³ In supermarkets, for example, 10 brands account for about 95% of volume.⁸⁴

Australian brands belong to one of three categories, commonly termed premium, mainstream, and supervalue. Wills called them “premium, value and commodity” and characterised them as: “image, image/value, and value/image”.^{49 78 85} Supervalue are sold primarily in packs of 30, 40, or 50, mainstream and premium brands in packs of 30, 25, or 20.^{50 86} The three categories were slowly constructed through competitive attacks and in response to perceived consumer preferences between the early 1970s and the introduction of the Tobacco Advertising Prohibition Act in 1992.

Table 2 presents the major Australian brands of ready made cigarettes. Mainstream brands have the largest market share in both the convenience and the grocery sector. After mainstream brands, premium does better in convenience shops and supervalue in grocery shops.* A similar skew is seen in the targeting of advertising to retail trade publications, although for high profit premium brands there are

*Based on data from *Retail World Annual Report 2001* and *Australian Convenience Store News* March/April 2002 Tobacco feature.

more advertisements overall, and more double page and cover advertisements.

The premium segment

The premium segment contains Australia's oldest brands, mostly major international brands. They are targeted at younger, more urban, higher income consumers who care more about image than price and are more likely to buy in packs from convenience stores than cartons from grocery stores, and also to the mainstream smokers who use them as supplementary brands.⁸⁷

The common element of the premium core brand identity is quality.^{71 78 88-92} As Aaker notes,^{3 4} "quality" and "value" are inextricably linked, and premium brands offer quality rather than value—they are typically sold at high price in a small pack. "Quality" is seen in brand-as-symbol and brand-as-personality elements as well as brand-as-product elements such as taste.⁹¹

Australia is a "priority market" for Benson&Hedges (B&H), which dominates the premium segment.⁹³ The B&H core brand identity is "gold", communicated especially through the pack.^{71 88-91} B&H's "gold" identity is strongly reflected in its brand image, and aligns the brand to the premium brand essence of quality.

Alpine's core brand identity, in addition to the brand essence of quality, is "fresh clean femininity".^{76 92} This is strengthened by brand-as-product, brand-as-symbol, and brand-as-person elements. Alpine's users are young, feminine, white collar (or not working) women.^{89 92 94} Alpine is mentholated and has white tipping and a green and white pack.^{71 89 92} It also has a heritage of "escapist" promotional imagery starring a young, free, and attractive woman going on a five star beach holiday.^{71 89 92}

Consumer research commissioned by the industry shows that premium brand images match their identities and positioning. Both Dunhill and B&H are perceived as classy, stylish, up-market and top quality,^{49 95} B&H as clever/smart with status, non-elitist but aspirational,^{90 91} Dunhill as exclusive/elitist.⁹¹ The maintenance of B&H's "gold" heritage tells B&H smokers "I'm OK, you're OK" in the face of the declining social acceptability of smoking.⁹¹ Alpine is perceived as milder, cleaner, less harmful, and more "healing" than non-menthol cigarettes. Its image also has strong brand-as-person elements. Alpine is "feminine", "upmarket", "sophisticated", and signifies "balanced success as women" to its smokers. Alpine benefits from a relationship with its smokers that provides "emotional gratification", relaxation, "regaining control and confidence", "looking and feeling attractive", and "temporary escapism."^{71 92}

The mainstream segment

Although a range of price offerings had been available in Australia from at least the 1960s,^{62 69 89 96} the late 1970s saw a major shift towards "good value" in the Australian cigarette market, internationally unprecedented in size and scope.⁷³ "Good value" was seen to incorporate price, imagery, and product elements, including perceived quality.⁸⁹ Tobacco industry analysts have said that Australian consumers see "the same quantity for less money" as "decreased quality", instead demanding more quantity for the same money. "The US generic approach of low price/low image product has never been successful in Australia. Discount for quantity purchase is a pre-requisite for success. This belief is reflected

†Internationally, in the mid 1980s, there was a move "away from classical image based brands to a wide variety of value for money offers" in cigarette marketing.^{97 98} Australia is not the only market to have experienced a value orientation, but the mid 1970s Australian shift was notable for its size and scope at the time.

across the entire consumer perishables segment."^{73 89 96} In 1983 an international consultant observed that this added value approach seemed to remove the stigma from smoking cigarettes that cost less per stick.⁶⁹

The mainstream cigarette category was created by two new, successful brands, Winfield (25s) and Peter Jackson (30s), which capitalised on the Australian smokers' desire for more for the same price. Larger packs offered the manufacturer's economies of scale and also increased smoker's consumption.^{73 99} The mainstream brand essence was: a good humoured "fair go" for ordinary Australians. The category brand identity thus contained quality/value elements (a fair go), user elements (for ordinary Australians), and personality elements (egalitarian good humour).^{69 88 89 100 101}

Both brands fore grounded "a fair go" in their positioning, Winfield as "5 smokes ahead of the rest" (25 cigarettes rather than 20),¹⁰² and Peter Jackson as "30 of the best at a popular 25s price", and later "Best value in Australia".¹⁰³⁻¹⁰⁵ Both emphasised full or added length to further this positioning. This value emphasis was supported by "intense image development program[s] to obtain smokers' loyalty and resilience to competitor initiatives",^{73 102} which included elements of brand as product, person, and symbol.

Winfield's brand-as-person element, a cheeky "Aussie bloke", was provided by the actor Paul Hogan.^{102 106} He starred in Winfield's humorous advertising campaigns throughout the 1970s, advising "anyhow, have a Winfield", with a calm grin, in the context of bizarre, challenging, or hopeless situations. This was welcome advice in a context of recession and youth unemployment.¹⁰⁶ Accordingly, Winfield's smokers were younger, slightly more male, and of lower socioeconomic status: Winfield was particularly "for those starting to smoke".¹⁰⁶ Although Hogan was removed from the advertisements in 1980 on the grounds that he appealed to children, the strong association meant that he continued to be a high profile "walking advertisement for Winfield",⁸⁹ and longstanding "Winfield Cup" sponsorship of Rugby League football helped sustain the masculine Aussie personality of the brand.

Peter Jackson's mainstream Aussie humour was communicated through the tag "Peter Jackson: you're laughing".¹⁰³⁻¹⁰⁵ Its brand identity included a quality edge, intended to be communicated through pack, advertising, premiums, and event promotions.^{48 78 81 101 104 107} The brand relied heavily on associations with motor racing,^{75 76 105} but also softened brand-as-symbol elements over time to become less aggressive and masculine and further differentiate from Winfield.^{66 78}

Mainstream brand image has varied. In the 1980s smokers agreed that Winfield was lesser quality than premium brands in consumer research,^{88 106} but Winfield's own smokers saw it as a "respectable", value for money brand, mirroring the brand's identity.¹⁰⁶ Premium smokers, in contrast, emphasised poor quality, seeing Winfield as smaller, looser, cheap, with a "burning" taste, and found Winfield's symbols "unattractive".¹⁰⁶ In the 1990s, Winfield smokers described their own brand to be higher quality than Peter Jackson.⁹⁵ Supervalve smokers characterised mainstream cigarettes as "everyday" but also as out of their league because they were "quality" brands, not far behind premium brands.^{85 95} In 1993 these smokers still linked Winfield to Paul Hogan, describing the brand as "quality, Paul Hogan, average bloke—cheeky, Australian" and Peter Jackson as "average bloke, standard, cigarette machine, Australian".⁸⁵

The supervalve segment

The success of mainstream offerings plateaued in the late 1980s, undermined by growing pack sizes that created a new category dubbed "supervalve".¹⁰³ Packs of 35 and 40 grew to 20.5% of the market in 1988/89, first with Stradbroke and

then with Longbeach as the first full specification 40s product.⁷³ Holiday was the first 50s in 1991, followed by Horizon as the first full size 50s. PML attributed the rise of supervalues to increasing taxation, and the fact that “the aggressive activity of the anti-smoking lobby ha[d] impacted significantly on the social acceptability of smoking, which ha[d] in turn diluted considerably the traditional benefits of an image platform for brands”.⁷³ In addition, manufacturers had been prioritising market share over profitability, “diluting the value of trademarks through a focus on value, which can easily be duplicated or surpassed by competitors, as opposed to consolidation of image providing a unique value (i.e. not price) to the trademark. This has been reflected by switching rates—over 33% of Australian smokers are now switching within a 12 month period. This problem is likely to be exacerbated by draconian restrictions...”⁷³

Documents from this period resonate with the general dichotomy in the marketing literature between “brands” and “commodities”, expressing fears that without effective brand building and in the presence of price discounting, Australian cigarettes could become commodity items.^{47 108–111} Premium and mainstream brands were suffering and it was feared that the trend might spread to other countries.^{111 112} Rothmans, manufacturer of Winfield, had a 33% profit decline in 1990/91, and a further decline of 70% in 1991/92,¹¹³ and Rothmans’ competitors were exasperated with its apparent disregard for brand equity.^{111 113} Despite Winfield being a major competitor for the brands of Philip Morris (Australia) Limited (PML), Henry Goldberg, PML’s managing director, was extremely concerned about the erosion of Winfield’s brand equity and price position, and concluded “any increase in legitimate market expenditure by Rothmans would be a welcome return to them re-building brand equity”.¹¹¹

Despite the dangers, the trend culminated in a “damaging and peculiarly Australian price war”,⁷⁸ which was financially unsustainable for the industry.^{74 114} The fact that larger pack sizes further increased individual smoker consumption⁷³ was poor compensation for the tiny margins on large packs and the loss of smokers from brands with larger margins. Wills’ Horizon 50s, launched in 1991, had zero margin.⁴⁸ Although the companies developed the technology to produce 60s and 65s,^{48 49 111} it was not used—by 1993 supervalues growth had flattened, and the 5% per annum decline in mainstream and 1.5% per annum decline in premium had stopped.¹¹¹ However, the damage to premium brand equity was considered lasting.⁷⁵

The shared essence of supervalues brand identities, the key to their positioning, and the prime motivation of their users, was value for money, and pricing was a vital component of the brands’ marketing strategies.^{78 115} Supervalues users were older, more female, poorer, and heavier and longer term smokers, who purchased from grocery stores.^{85 115}

However, the industry saw the value for money essence as an insufficient basis for long term supervalues brand equity.^{75 76} Thus brand-as-person and brand-as-symbol elements were created. These were intended to have “an attitude of freedom, escape [and] mildness” and to be aspirational.^{103 115–117} Blue tones were used, and waterside scenes implying escape to the freedom and relaxation of the water’s edge,^{75 85 115–117} resonating with Australian grand narratives of beachside summer holidays and coastal retirements. The tag for Longbeach, “You’re miles ahead”, presented against scenes of long deserted beaches, exemplified the link made between the brand identity essence of “value for money” and the core brand identity element of waterside escape and freedom.^{48 103 117} Because supervalues brands were launched close to the introduction of the TAP Act, this positioning has relied heavily on the point of sale and the pack.^{76 85}

Brand image information from market research done by the tobacco industry showed a clear division between supervalues brand smokers and non-supervalues brand smokers. Smokers of all brands saw supervalues as “budget” brands.^{49 85} Non-supervalues smokers saw them as thin, poor-tasting cigarettes, not value for money, and only attractive in terms of price.⁹⁵ Winfield smokers defined supervalues brands as “not Winfield” and therefore “no name” (the Australian colloquialism for generic brands).⁹⁵ Non-supervalues smokers also described the brands as “cheap looking” and did not respond positively to the classic supervalues symbols of beach scenes. They described supervalues smokers as immature, bland, wimpy surfers, and effeminate.⁹⁵

In contrast, supervalues smokers saw the brands as being reasonable quality for the price, providing “more for your money”,⁹⁵ and supervalues users as happy, relaxed, easy-going, an “aussie lifesaver”, popular, outgoing, male or female, and importantly, as someone who looks for quality and value and “beats the system”.⁹⁵ Supervalues smokers described the beach symbols as a drawback, as empathetic, desirable, appropriate to the brand, and providing space, freedom, relaxation, and contentment.⁹⁵ Supervalues smokers also seemed to view their own brand in a disproportionately positive light, describing them as “not shrunken”, flavour-some, easy to smoke, well priced, “the best of the big packets”, and popular.⁹⁵ Longbeach smokers saw Longbeach as better quality than mainstream brands or other supervalues brands.⁹⁵ Horizon smokers saw their brand’s personality as “a seductive woman walking along the beach”, calm, relaxed, and “floaty”.⁸⁵ Holiday had a poor brand image with Horizon smokers, seen as bad quality, “cheap and nasty”, “loud/busy/noisy” and thin, and Holiday users were “people who can’t afford smokes” and “street kids”.⁸⁵

Brand failure: Marlboro in Australia

As a BATCo marketing intelligence department document observed in 1994, “there are virtually no markets, excluding Australia...where Marlboro has failed.”¹¹⁸ In 1976, the year Winfield was launched, Marlboro had a 12.5% brand share, and 55% of Marlboro smokers were under 25. By 1989 Marlboro had only 2.7% share and only 11% under 25, despite PML’s sacrifice of profit margins to try to bring it back.^{89 119} It remained PML’s “biggest problem” throughout the 1980s and 1990s, despite high brand awareness and consumers reporting that it was a cigarette “for Australians”.¹⁰¹ The failure has been attributed to the success of mainstream, supervalues, and low tar; Marlboro’s strong flavour and smell, atypical of Australian blends; and inconsistent and inappropriate brand positioning, including the Marlboro Man, seen by some Australian audiences as a cultural imperialist.^{101 119}

Attempted solutions between 1980 and 2000, with close involvement from PM Corporation,^{119 120} were focused on increasing the flow of teenage starters to the brand, and addressed elements of brand-as-product, brand-as-person, and brand-as-symbol. They included PMI almost immediately taking over advertising (imposing the American cowboy, considered a “mistake”),¹²¹ importing US soft packs (1983),¹²² decreasing pack size (1984),¹²³ and “making the advertising appealing to younger smokers who are in the process of forming brand preferences” (1984).¹²³ There was also an attempt to change the blend to “make it harder for existing smokers to leave the product”.¹²³ Project Classic, a re-launch of the original 20s as a cult, individualistic, “Fully imported from the USA” brand also did little, despite being designed by Leo Burnett, the advertising agency responsible for the Marlboro Man.¹¹⁹

By 1993 PM were so desperate that, along with another modified blend and an “Australian version of Marlboro

Country [to try to] rebuild Marlboro's big brand image", Marlboro's price was lowered to parity with Winfield, effectively putting Marlboro in the mainstream segment in terms of price, and potentially undercutting any aspirations to the premium essence of "quality". It continued to "behave like one of the minor, unsupported brands".⁷⁸ As always with Marlboro, Philip Morris is prepared to wait. Growth has been slow and inconsistent, with share still minimal at grocery stores but up to 5% at convenience stores.^{24 86}

DISCUSSION

Brand equity is a shared strength and weakness of the tobacco industry. A market consisting of robust brand identities with strong, positive brand images is the industry's assumed ideal, creating a more profitable market for all competitors. Equally, even unilateral undercutting of brand equity risks the introduction of an entirely price based commodity market. The Australian market has settled into three brand categories, premium, mainstream and super-value, each having a "brand essence" which is shared by its members. Brands within these categories have additional core brand identities that make them more or less distinct from one another. The failure of Marlboro in Australia may be at least in part due to its poor fit with Australian brand categories, as it lacks both the quality essence of premium and the good humour, value, and ordinary Aussie user associations which form the essence of mainstream.

All of the brand identities discussed in this paper were created before the introduction of the TAP Act in 1992, although the various supervalue brands had only one to three years to establish themselves via print, billboard, and radio advertising, and have thus relied almost entirely on point of sale and the pack for positioning. However, brand image research conducted by the industry after the introduction of the TAP Act showed striking congruence, for successful brands, between brand identity and brand image. As noted in the introduction, brand images are created cumulatively over time. Thus consumers' perceptions are likely to be based both on current marketing through available channels, and the brands' historical associations (exemplified by Paul Hogan still being linked to Winfield in smokers' minds 13 years after he was removed from the brand's advertising).

It is also clear that brand image is relative—the perceptions of smokers of supervalue brands differ substantially from those of premium brand smokers. This suggests some fundamental differences in the ways in which different smokers approach and choose between cigarette brands: that particular brand identities may resonate for particular smokers. Brand management principles can be applied to any communicative task, and brand identity elements may have potential for use in quit messages or media advocacy. Premium smokers may particularly respond to the brand-as-product element of quality. Mainstream smokers may appreciate familiar user elements (for ordinary Australians) and personality elements (egalitarian good humour). Both mainstream and supervalue smokers may respond to the idea of a "fair go" or "value for money". Supervalue smokers may prefer symbol and personality elements of waterside escape, relaxation, freedom, and aspiration.

This potential could be further explored through research, as there are many questions not answered here. How loyal are Australian smokers? How distinct are the smokers of the three brand categories? Are smokers meaningfully differentiated by their brand choices? How do smokers relate to cigarette brand identities? Could the elements of these identities be used to destabilise commitment to smoking? Might smokers respond to different quit messages, as they have responded to differences in branding? Given that mildness is an inherent trait of successful brands, could

What this paper adds

The Australian tobacco industry's brand management strategies have not been explored in the tobacco control literature.

This paper introduces a framework for understanding how brands work, and applies it to successful Australian cigarette brands. Unique aspects of the Australian cigarette market include low brand loyalty, strong preference for low tar, and the existence of three distinct brand categories. An understanding of how brands operate in the market could assist tobacco control efforts to further undermine Australian cigarette brands.

accurate information about "low tar" cigarettes be a particularly effective quit communication in Australia? Given the success of local, "Aussie" brands, could the multinational nature of the industry be a useful frame for reducing the industry's social acceptability?

This raises a glaring gap in Australian cigarette brand identities: brand-as-organisation. Aaker proposes that characteristics of the organisation, such as innovation, trustworthiness, or its local/global character, can be used as brand identity elements.^{3 4} However, Australian cigarette brand positioning is relatively silent on this point. Australian consumer research has suggested that consumer trust in general is declining, creating a more critical and vigilant audience for brands that demands that products and the businesses behind them live up to their brands' identities.²¹ Anti-corporate activists have been using the brand-as-organisation element in their campaigns for years, associating Nike with Asian sweatshops rather than athletic tenacity, for example, or Starbucks with global and local market thuggery rather than the creation of community.²⁸

A common means to subvert brand identities is via adbusting—modification of existing brand advertising such as billboards. Adbusting was important to Australian tobacco control before the TAP Act,¹²⁴ and could still be of benefit in other markets, but is no longer relevant in Australia's restricted advertising environment. However, both traditional advocacy and culture jamming via the media and other channels could be used to creatively subvert brand positioning and to link brands to company activities incongruous with that brand's identity (for example, to highlight the profits made on the popular, supposedly "good value" mainstream brands). Communication could also be customised by brand: pack inserts, cardboard wraps around the pack, and health warnings are all existing communication channels that could potentially be utilised.

The Australian industry has acknowledged that tobacco control activities have seriously undermined brand equity in the cigarette market, not least by regulation of tobacco marketing. This work demonstrates the complexity of brand identities, and that brand image lives on in consumers' minds after the introduction of restrictions of above-the-line marketing. Brand image is tenacious and is far more than a simple trademark, incorporating elements such as user associations and longstanding relationships between smokers and their brands. Brand-as-product, brand-as-person, and brand-as-symbol elements should be considered in regulating cigarette marketing. Obvious remedies are the removal of point of sale marketing and the introduction of generic packaging, but even generic packs, if offered in the three existing brand categories, and particularly if they can be readily linked to previously existing brands, are likely to benefit from historic brand identities. It may be that existing brand identities will live on until a restructured generic cigarette market can be introduced.

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