

RJR-MACDONALD INC.

MEMORANDUM

TO: Rob Parker
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FROM: Mary Trudelle

DATE: February 20, 1995

SUBJECT: RESEARCH

This will serve as an executive summary of the proposed phase II public opinion research and exploratory creative research on second-hand smoke. A full research proposal and draft questionnaire is being sent to the research committee and Bob Carew for their input and comments.

BACKGROUND

The first industry survey on public opinion (June 1994) provided a good perspective on general attitudes towards smoking. It also indicated widespread acceptance of government involvement in regulating the industry and smoking behaviour. Since then age restrictions have increased and several provinces have either implemented (Ontario) or are proposing additional restrictions on where and how tobacco can be sold and where people can smoke (Nova Scotia, Quebec, Vancouver Area). January 9th., the Federal government launched a new advertising campaign which focuses on tobacco constituents and second-hand smoke. Industry tracking studies indicate that misperceptions about the risks of second-hand smoke and public attitudes towards smoking in general are becoming more negative.

It is against this background that the industry is preparing to develop a long-term communication strategy and programs.

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1) Strategic Communications Study (Phase II Quantitative)

a) Purpose of Research

- To help the CTMC understand the nature of public opinion with respect to a number of issues:
 - second hand smoke
 - youth access
 - smoking in public areas such as bars, restaurants, bingo halls, shopping malls, stadiums, etc.
 - accommodation (resolving differences)
 - government regulations
 - government advertising and education programs
 - industry vs. company credibility
 - how the industry can improve its position and credibility.
- To help the CTMC determine what strategies are required to achieve its long-term goals and meet the on-going challenge of further restrictions.
- To provide a benchmark to evaluate industry communications over the long-term.

b) Study Methodology

- National telephone survey of smokers and non smokers ages 18+
- 1200 interviews
- Approximately 20 minutes interview
- Cost - approx. \$45-50M (depends on final questionnaire)
- Note 1200 interviews will not permit extensive regional sub-analysis.

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b) Study Methodology

- Timing
 - questionnaire 2 weeks (Max.)
 - infield 1 wk.
 - top line 1 wk.
 - final report 2 wks.

2) Exploratory Research on Second-hand Smoking Advertising

a) Purpose of Research

- To explore the potential impact and credibility of modified U.S. second hand-smoke advertisements on Canadian perceptions and attitudes.
- To explore the same for Canadian concepts.
- To assess the comparative credibility of industry versus individual company sponsorship of second-hand smoke advertising.

b) Study Methodology

- Two phases - phase 1 - focus group testing amongst separate groups of smokers and non-smokers (18-49) in two centres, Toronto and Montreal
- 4 groups in each centre
- Second phase in four centres, after ads tested in phase 1 have been fine-tuned.
 - two groups in each centre (Toronto, Montreal, Halifax and Vancouver)
- Est. Total Cost \$56.0M excluding travel expenses
- Timing
 - creative development 2 wks.
 - focus groups 1 wk.
 - topline debrief 1 wk.
 - final report 1 wk.

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