

# RESEARCH REPORT

BRAND IMAGE SURVEY  
RM/CIRC/1987.04

BOOK I

RESEARCH AND INFORMATION DIVISION  
P.T. B A T - INDONESIA

Date Issued : 22-01-1987

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BOOK I  
BRAND IMAGE SURVEY

TOP - LINE FINDINGS

BRAND IMAGE SURVEY

JAKARTA - MEDAN

SEPT - OCT - 1986

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TOP - LINE FINDINGS

BRAND IMAGE SURVEY

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SUMMARY &

RECOMMENDATIONS

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KEY FINDINGS

ANALYSIS OF THE FINDINGS

MARKETING IMPLICATIONS

OF THE FINDINGS

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KEY FINDINGS

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### KEY FINDINGS

#### REQUIREMENT FOR AN IDEAL CIGARETTE

1. Cigarette is a product which is judged primarily on its product attributes (all of which are related to smoking satisfaction) and followed by judgements upon non-product attributes. In the order of their relative importance in choosing a cigarette, the following ranking are revealed :

##### Product attributes

1. Taste in tongue/mouth
2. Smoothness of the smoke
3. Overall satisfaction
4. Pleasantness of aroma
5. Amplitude of aroma
6. Strength level

##### Non-product attributes

1. Value for money
2. Masculinity
3. Social class
4. Age identification
5. Pride
6. Sophistication level
7. Popularity
8. Time relevance
9. Pack appearance
10. The way it is advertised

2. Sub-group variation exist on the ranking of the above attribute importance as below:

Smoker-groups	Give above average ranking to	Give below average ranking to
- International brands	- Age identification - The way it is advertised	- Pride
- Medium Priced White brands	-	- Age identification
- Cheap white	- Strength level - Pride	- Popularity
- M M K F	- Popularity	- Sophistication
- H M K P	- Popularity	- Age identification - Pride

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3. With regard to 'two-way' attributes, in general the smokers prefer
- milder cigarette
  - not sophisticated one
  - unpronounced amplitude
  - younger image
  - masculine image
  - popularity

4. Sub-group variation on the paragraph 3 above are revealed as below:

- International brand smokers :	Modern	Younger	50/50 Popular/Exclusive
- Medium-priced White smokers :	Modern	Younger	Popular
- Cheap white smokers:	Traditi- onal	Older	Popular
- MMKF smokers :	Modern	Younger	Popular
- MMKF smokers :	Traditi- onal	Older	Popular

#### APPROACH OF ANALYSING BRAND IMAGE DATA

5. Brand image data are analysed through Grid Analysis.  
Since the capability of the software is limited to analysing 12 brands plus 12 attributes, the image data are analysed by segment and twelve attributes have to be selected out of 16 included in the survey.

#### IMAGES OF INTERNATIONAL BRANDS

6. SE 555 KSHL (BP 700/20's) is perceived as being quite popular brand with quite an acceptable taste. However, SE 555 is considered to have lower performance than expected/wanted on product aspects (pleasantness of flavour, overall satisfaction), and on non-product attributes (masculinity, age, sophistication, time relevance and pack appearance). Compared to Dunhill KSHL, it is lower on sophistication level and time relevance.

7. Benson & ...../

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7. Benson & Hedges (BP 900/20's) is perceived as being sophisticated, modern and having an attractive pack. Compared to what the international smokers wanted, B & H is lower on product aspect, as well as on value for money, age and pack (slightly). Compared to Dunhill Int'l TL, B & H is lower on product as well as non-product aspect (value for money).
8. Lucky Strike (BP 700/20's) is perceived as being quite strong and having quite quite high amplitude of flavour. Compared to what the international smokers wanted, Lucky Strike is lower on product aspects, as well as on non-product ones (value for money, sophistication, time relevance and pack appearance). Compared to Marlboro LSHL, Lucky Strike is lower on almost all aspects.
9. Kent (BP 900/20's) is perceived as for being quite young smokers. However, compared to what they wanted, Kent is lower on almost all aspects. Compared to Marlboro LSHL, Kent is lower on product aspect as well as non-product ones (value for money, popularity & pack appearance)
10. All international brands seem most vulnerable to kreteks. Basically, white international brands are lower on product aspects, as well as non-product ones, like value for money, age identification and popularity.

#### IMAGES OF MEDIUM-PRICED WHITE BRANDS

11. Ardath KSHL (BP 425/20's) dominates the scene and is perceived as having quite a good taste, quite satisfying, and having quite a pleasant aroma, with quite an attractive pack. Compared to what they (Ardath KSHL smokers) wanted, Ardath KSHL seems lower on product aspects as well as on non-product ones (value for money, sophistication level, and time relevance). Compared to Kansas AB and Fall Mall, Ardath KSHL is lower on non-product aspects (masculinity, sophistication & time relevance).

12. Commodore ...../

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12. Commodore LSFT (BP 500/20's) is perceived as quite a good value for money product, having quite a good taste, being quite satisfying, and having quite pleasant flavour. Compared to what they wanted the brand seems slightly lower on product imagery and also lower on non-product aspects (masculinity, age, sophistication, time relevance, and pack appearance).

#### IMAGE OF LOW-PRICED BRAND

13. Escort LSFT (BP 400/20's) is perceived as being sophisticated, young, modern, masculine and strong. Compared to what low-priced brand smokers wanted, Escort LSFT is lower on product aspect, and on value for money and popularity.

#### VULNERABILITY OF WHITE AGAINST KRETEK

14. Almost without exception, white cigarette brands are vulnerable against kretek. White brands considered particularly lower on product aspects and, to a certain extent, on non-product imagery (like age identification, value for money, etc).

#### BEHAVIORAL BACKGROUND OF SMOKER GROUPS :

##### SMOKING AND CIGARETTE PURCHASE HABITS

15. White smokers are more likely to also smoke kretek than do the reverse. White smokers also smoke more cigarette than do kretek smokers. White smokers mostly buy cigarettes in packs, whereas kretek smokers are more likely to buy sticks, therefore the former buy more sticks than the latter.
16. Although white smokers on the average consume less cigarette than kretek smokers, on overall they spend slightly less. (Note : Premium white smokers spend the most, but low-priced smokers spend the least). For white smokers, shop & warung are slightly less important as source of cigarette purchase; they show more propensity to buy from agent.

Smoking ...../

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#### SMOKING HISTORY

17. In general, kretek smokers tend to start smoking at relatively slightly younger are than white smokers, kretek smokers are less likely to have switched from white.
18. On overall, viewed from their life-style, premium white smokers show more resemblance to MYKP smokers. Whereas low-priced white smokers seem closer to MYKP smokers. Amongst the medium priced smokers, Ardath KSHL smokers are closer to premium-brand smokers, whereas Commodore smokers are closer to cheap white smokers. The distinctions are described on the following paragraphs.

#### ARDATH KSHL SMOKERS

19. Ardath smokers are slightly more likely to also smoke kreteks. They smoke slightly more cigarettes. Some Ardath smokers are more likely to buy cigarette in slofs/cartons. Therefore they spend slightly more money. Agent is slightly more important for them as source of purchase. Compared to Commodore LSPT, Ardath KSHL have slightly more new converts.
20. Ardath smokers are slightly more inclined (than average) to practise sports. They slightly prefer more rock/pop and western pop music. They tend to read newspaper/magazine more often. But they listen to the radio in lower frequency. And they also visit cinema slightly more frequently.
21. Compared to Commodore LSPT smokers, Ardath smokers are slightly younger and less associated with being married and being the Head of Household. They are slightly more associated with being students, and in general their education levels are quite high.

COMMODORE ...../

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COMMODORE LSPT SMOKERS

22. Commodore smokers are much less likely to also smoke kreteks. They smoke slightly fewer cigarettes. Some (a few) are likely to buy cigarette in loose stick. They slightly less money on cigarette. Shop and Warung are slightly more important for them as source of purchase. Commodore LSPT is among the brand with more long-standing smokers (less new converts).
23. Commodore smokers are slightly less inclined to practise sports. They more preferred dang-dut & Indonesian pop. They read newspaper/magazine less often. They also visit cinema less frequently. But they listen more often to the radio.
24. Compared to Ardath KSHL smokers, Commodore smokers are older. They are more associated with being married, and very much less associated with being student. Their education levels are, in general, quite low.

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ANALYSIS OF THE FINDINGS

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ANALYSIS OF THE FINDINGS

FORCES AT WORK WHICH WOULD THE SITUATION REVEALED THROUGH  
THE BRAND IMAGE SURVEY

25. The foregoing findings extracted from the survey are the pictures of the results of interaction between the consumers and the stimuli generated by various brands offered in the cigarette market. Therefore, the situations revealed can be referred to marketing activities in the market within the last few years. Before further analysis, it is appropriate to sum-up the main findings as below :

1. Kretek is real threat to white cigarettes through its superiority in product performance coupled with value for money and other non-product imagery.
2. Specific areas of vulnerability which seem significant for BAT brands in the international brand segment are as follows :
  - SE 555 : non-product attributes (sophistication level & time relevance, age & pack appearance).
  - B & W : product & non-product aspects (age, pack & value for money).
  - Lucky Strike :  
product & non-product aspect (sophistication level, time relevance, pack appearance and value for money).
  - Kent KSHL :  
product & non-product aspect (pack appearance and value for money).
3. Although Ardath KSHL is perceived as quite a good cigarette with an attractive pack, the smokers want more satisfaction and better image attributes particularly on sophistication level, time relevance and masculinity.

4. Commodore LSPT .../

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4. Although Commodore LSFT is perceived as quite a good value for money product with quite acceptable product performance, some weaknesses are revealed on non-product imagery (age identification, sophistication, pack appearance and masculinity) as well as some slight weaknesses on product aspect.
5. Although Escort LSFT shows some well-accepted attributes, it is still lower on value for money and on some product attributes.

#### THE THREAT OF KRETEKS

26. Physiologically, when a smoker smokes a cigarette, it is nicotine which he/she is going for. At the level of consumer language, the effect of nicotine intake is termed "strength (kick or hit at the back of the throat)". The findings on the respondents' requirements for an ideal cigarette reveal that the smokers do not seem realize it. (Strength is put at the lowest rank among the product attributes, and they tend to prefer milder cigarettes). Therefore, it can be inferred that for a smoker, smoking is more a means for obtaining a pleasureable experience, which is defined as sensing pleasant taste in the tongue/mouth, the smooth of the smoke and sensing a pleasant aroma, than for getting nicotine.
27. Further inference leads to the thinking that, at least for Indonesian consumers, the force of demand is such that they want nicotine, but for them tobacco taste seems less acceptable. In other words, on the average, the majority of consumers do not want to taste the rawness of tobacco. (Even in blend testing, smoothness is a very essential attribute for them).
28. The respondents favourable evaluation on kreteks superiority on product aspects support the above. Cloves plus flavours in kretek cigarettes seem to have well masked the rawness of tobacco. Coupled with the food habits which are basically spicy, kreteks have given far superior offer to Indonesian consumers.

29. The threat ...../

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29. The threat arising out of product superiority of kretek becomes more severe when kretek brands are able to equalize themselves on non-product imagery with white brands, the area which, traditionally, constitute the strength of white cigarette. (Some smokers even consider that Jarum Super, for example, is as modern as SE 555).
30. The above marketing activities of kretek brands seem to have influenced the smokers attitude and evaluation on white cigarettes, as revealed through the findings of this survey.

MARKET DISTURBANCES BROUGHT ABOUT BY MARLBORO LSWL

31. Marlboro LSWL has overtaken the position of Dunhill Int'l TT as the "yardstick brand" in the International brand segment. Its being American blend plus intensive campaign on a very interesting communication platform seem to have made the brand be perceived as the most satisfying cigarette, the most popular brand, strong cigarette, having a good taste with a quite a pleasant flavour in its segment.
32. Marlboro's strength is also revealed through the findings that it is the only white brand to which kretek smokers are mostly vulnerable to, although it is still below the same kretek. ( 67 % G.G. Int'l Red smokers are vulnerable to Marlboro, although G.G. Surya 16 is the switching target for 86 % of G.G. Int'l Red smokers).

THE SMOKERS' ATTACHMENT TO THEIR BRANDS

33. Although the threat of kreteks has changed the scene and disturbances caused by Marlboro has been felt, some BAT's brands show resilience. The forces behind seem to be emotional ties which have developed between particular brand and its smokers.

34. Emotional ...../

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34. Emotional ties between the brand and its smokers have developed through the smokers' experiences as their responses to the brand's marketing stimuli. The bulk majority of Ardath KSHL smokers (62 %) have smoked Ardath over three years. 73 % Commo-core LSFT smokers are long-standing smokers. Therefore, emotional ties seem stronger toward those brands.
35. The inherent weaknesses revealed only indicate that the demands of the brand's smokers might have somewhat changed due to the influences of marketing stimuli generated by various offers in the market. However, efforts to bring the brand closer to the target consumers' demand should take into account the smokers' emotional ties to the brand.

PRICE-CONCERNED SMOKERS AT THE BOTTOM

36. Respondents' evaluation on Escort LSFT clearly show that the lowest end of the white market seems to be extremely price-concerned, although they also admire some sort of image benefits. Escort LSFT at Rp 190,- with all its strong non-product imagery seems unable to cater for the smokers' need for a value for money product.

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MARKETING      IMPLICATIONS

OF   THE   FINDINGS

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MARKETING IMPLICATIONS OF THE FINDINGS

37. The foregoing findings and analysis thereupon suggest that the market competitive situation is such that some strategic marketing actions seem to be required to overcome the situation. In my personal opinion, the order of priority of actions would be :

- a. to respond to kretek threat.
- b. to enter the low-priced segment.
- c. when appropriate, to improve some elements the current marketing mix of the current brand.
- d. to proliferate the current brands which still have good appeals.

THE NEED TO RESPOND TO KRETEK THREAT ON THE BASIS OF PRODUCT PLATFORM

38. Past experiences have shown that any activities within the areas of white cigarette, even those which were successful (like Escort LSFT and Marlboro) on its own, are unable to halt the expansion of kretek, and halt the company's volume decline.

This indicates that the only viable alternative would be to do activities on the basis of genuine competitive platform.

As has been known, the most destructive weapon of kretek against white is its product superiority.

39. It has been revealed that the product superiority kretek lies on the effects of clove plus flavours to mask the rawness of tobacco by suppressing irritations and giving pleasurable taste sensations to Indonesian smokers. In order to be able to viably compete kreteks, the only approach seems to be basically product-oriented.

LC. Any ...../

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40. Any marketing offer is a competitive tool, and as such, the product objective envisaged shall be : to offer better and more pleasurable smoking sensations than other product through better masking the rawness of tobacco and giving pleasurable flavour sensation, and enjoyable taste sensations.

THE OPPORTUNITY TO ENTER THE LOW PRICED WHITE SEGMENT

41. PG V - VI are the segments which seem able to maintain quite a considerable volume, in which a small share will mean quite a respectfull sales. Another brand aimed at competing at the bottom must be seen a better value for money offer than the current ones.

ROOMS FOR IMPROVING SOME MARKETING MIX ELEMENTS OF THE CURRENT BRANDS

42. This seems applicable more to BAT's brands in the international brand segment as below :
- to improve non-product imagery of SE 555 KSHL through more stimulating communication platform & more intensive campaign.
  - B & H through slight improvement in its presentation (pack), and quality improvement of the product.
  - to enhance the performance of Lucky Strike KSHL through product quality improvement, and better presentation (pack).
  - to enhance the performance of Kent KSHL through better presentation (pack), and through product quality improvement

BRAND ...../

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#### BRAND PROLIFERATION

43. This seems applicable more to Ardath House.  
Although some Ardath KSHL smokers seem to want a better performance product, they still appear to be linked to the brand emotionally. Therefore, drastic changes of the mix may be posed with consumer resistance.
44. Ardath is perceived as a good quality product. We can expand the brand franchise on the basis of this platform.  
A series of options can be explored. One more interesting one seems to be Ardath for young smokers.

#### COMMODORE HOUSE

45. This back-bone brand suffers from defects in terms of non-product imagery. Commodore LSFT is also the most vulnerable to kretek due to its inferior product performance.
46. The introduction of Commodore Special has slightly improved the House's imagery standing, particularly on being slightly more sophisticated, slightly more modern and having slightly more attractive pack.  
However no improvement is observed on the aspects of age identification, value for money and product performance.  
This suggests that something in the mix (most probably the very brand name) withholds imagery rejuvenation.
47. Past experiences on changing the presentation in the effort to rejuvenate the imagery had been posed with consumers' resistance. This finding suggests that the smokers of Commodore LSFT have developed some sort of emotional links/ties to the brand. (The majority of Commodore LSFT smokers have smoked the brand for more than 3 years).

48. Considering .. /

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48. Considering the findings of this brand image survey, as such, Commodore LSFT seems to require "overhaul" imagery standing. On the other hand, the core smokers seem to have developed emotional ties to the brand. Therefore, in order to solve the above conflicting demands, the only viable option will be to develop a somewhat distant off-spring of the brand.
49. The somewhat distant off--spring of Commodore LSFT is envisaged to still bring the Commodore name and logo in a miniaturized format. Louder voice will be communicated through more sophisticated presentation and specific adjective (for instance SUPER) which shall be selected to adequately represent contemporary tone and notes of the target group i.e. young smokers. As such, the new off-spring brand is able to reap the benefit of brand identification whilst also to exploit new opportunities for communicating rejuvenated image benefits.

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## RECOMMENDATIONS

The following are derived from the above marketing implications and on the consideration of constraints perceived :

1. To enter the low-priced segment with the following options :

- a spin-off of the currently still acceptable brand.
- a brand-name taken from the repertoire of BAT's brands which had good image in the past in Indonesia.

The brand should be priced as close to Hero & Union as possible.

2. To give more priority and efforts to Project Constrast, and renew its product objective in order to be really used as a competitive weapon. To give a solid basis for project development, it is also strongly recommended to construct a sensory map of the Indonesian main kretek and white brands.

3. To explore brand proliferation of the Ardath House through a series of consumer research.

4. To improve some aspects of the marketing mix for BAT's International brands :

- communications for SE 555.
- products and packs for Lucky Strike.
- pack for Kent.
- product of Benson & Hedges.

5. To consider to develop a new off-spring derived from Commodore house.

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# STRATEGIC ANALYSIS OF ONE BRAND MARKET POSITION

- MEDIUM-PRICED WHITE CIGARETTE -

ONE BRAND	SPECIFIC CHARACTERISTICS	WEAKNESSES			THREAT	FORCES AT WORK
		INHERENT *	VIS A VIS COMPETITION **			
- AMSTAR KSHL	- QUITE GOOD TASTE - QUITE SATISFYING - QUITE PLEASANT AROMA - QUITE ATTRACTIVE PACK	- LOWER ON PRODUCT ASPECTS. - LOWER ON VALUE FOR MONEY, SOPHISTICATION LEVEL, TIME RELEVANCE.	- LOWER ON NON-PRODUCT ASPECTS (MASCULINITY, SOPHISTICATION & TIME RELEVANCE).		- ASPIRING MORE TO UP-CL. BRANDS. - QUITE VULNERABLE TO KRETEKS. (LOWER ON PRODUCT ASPECT, VALUE FOR MONEY, AGE IDENTIFICATION & FAMILIARITY).	- MARKETING ACTIVITIES OF KRETEK BRANDS WITH SUPERIOR PRODUCT APPEAL/PERFORMANCE - SMOKERS' EMOTIONAL TIES TO THE BRAND.
- COMMONWEALTH	- QUITE GOOD VALUE FOR MONEY - HAVING QUITE A GOOD TASTE - BEING QUITE SATISFYING - HAVING QUITE A PLEASANT FLAVOUR.	- SLIGHTLY LOWER ON PRODUCT IMAGE - LOWER ON NON-PRODUCT IMAGE (MASCULINITY, AGE, SOPHISTICATION, TIME RELEVANCE, PACK APPEARANCE)	- SLIGHTLY LOWER ON NON-PRODUCT ASPECTS (SOPHISTICATION & TIME RELEVANCE)		- MOST VULNERABLE TO KRETEKS (LOWER ON ALL ASPECTS)	- MARKETING ACTIVITIES OF KRETEK BRANDS WITH SUPERIOR PRODUCT APPEAL/PERFORMANCE - SMOKERS' EMOTIONAL TIES TO THE BRAND.

\* ) GAP BETWEEN EXPECTATION VS PERFORMANCE.

\*\* ) COMPARED TO - KANSAS AB & FALL MALL (FOR AMSTAR KSHL).

- WEST KSHL & KANSAS KSGC ( FOR COMMONWEALTH ).

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## S U M M A R Y

1. All BAT's brands are vulnerable to kretek.
2. Comparative profiling reveals the following weaknesses (at different levels of intensity) of BAT's brands :
  - SE 555 : on non-product imagery attributes.
  - B & H : on product and non-product imagery.
  - Lucky Strike : on product and non-product imagery.
  - Kent KSHL : on product and non-product attributes.
  - Ardath KSHL : its smokers want better image attributes and somewhat more satisfaction.
  - Commodore LSFT : on non-product imagery.
  - Escort LSFT : on value for money.
3. The following market forces are identified as sources of market dynamics :
  - Marketing activities of kretek brands with superior product appeal.
  - Intensive Marlboro activities.
  - Attitudes and preferences of price-concerned smokers.
  - Smokers' emotional ties to their brand.
4. The tables on the following pages summarize the market positions of BAT's brands for each segment.

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## ii

**SUBSTITUTE WITH BEST DIRECT CONTACTS.**

# 3. ENVIRONMENTAL SA POLICY AND TECHNOLOGICAL INNOVATION VS. PROTECTION

Source: <https://www.industrydocuments.ucsf.edu/docs/kqhg0192>

STRATEGIC ANALYSIS OF OWN BRAND MARKET POSITION  
- LOW-PRICED WHITE BRAND -

OWN BRANDS	SPECIFIC CHARACTERISTICS	WEAKNESSES	THREAT	FORCES AT WORK
<ul style="list-style-type: none"> <li>RECHUT LEFT (BP 190/20'S)</li> </ul>	<ul style="list-style-type: none"> <li>SOPHISTICATED</li> <li>YOUNG</li> <li>POURON</li> <li>MASCULINE</li> <li>STRONG</li> </ul>	<p>INHERIT X)</p> <ul style="list-style-type: none"> <li>LOWER ON</li> <li>TASTE</li> <li>SATISFACTION</li> <li>PLEASANTNESS OF FLAVOUR</li> <li>VALUE FOR MONEY</li> <li>POPULARITY</li> </ul>	<ul style="list-style-type: none"> <li>NOT SO VULNERABLE TO HIGHER PRICE KEENEYS</li> </ul>	<ul style="list-style-type: none"> <li>ATTITUDES &amp; EXPERIENCE OF PRICE-CONCERNED STOKERS.</li> </ul>
		<p>VIS A VIS WHITE COMPETITORS XX)</p> <p>1) AGAINST HERO LEFT (BP 190/20'S) :</p> <ul style="list-style-type: none"> <li>PRODUCT ASPECT</li> <li>VALUE FOR MONEY AND POPULARITY</li> </ul> <p>2) AGAINST UNION LEFT (BP 140/20'S) :</p> <ul style="list-style-type: none"> <li>LOWER ON :</li> <li>PRODUCT ASPECTS</li> <li>VALUE FOR MONEY &amp; POPULARITY.</li> </ul> <p>3) AGAINST KAUFAS RSP (BP 190/20'S) :</p> <ul style="list-style-type: none"> <li>LOWER ON :</li> <li>PRODUCT ASPECTS</li> <li>VALUE FOR MONEY &amp; POPULARITY.</li> </ul> <p>4) AGAINST HERO SP KING (BP 190/20'S) :</p> <ul style="list-style-type: none"> <li>LOWER ON :</li> <li>PRODUCT ASPECTS</li> <li>(TASTE, SATISFACTION (PLEASANTNESS)).</li> </ul>		

(X) GAP BETWEEN EXPECTATION VS PERFORMANCE.

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