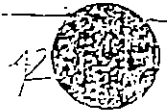


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AG-42

Document entitled "Canadian Facts,  
Project Eli"



# CANADIAN FACTS

PROJECT ELI

MH23-1/FSL

Spring, 1982

CS10

A large circular graphic dominates the lower half of the page. It features a thick, light-colored diagonal line that divides the circle into two unequal parts. A small, rectangular label with the text "CS10" is positioned near the top center of the circle, overlapping the diagonal line. The background of the circle is filled with a dense, grainy texture.

PROJECT ELI

MHZ3-1/FSL

Spring, 1982

Prepared by  
Canadian Facts

Presented to:

IMPERIAL TOBACCO LIMITED,  
Montreal, Quebec.

Canadian Facts  
1390 Sherbrooke St. West  
Montreal, Quebec H3G 1J9  
(514) 842-1734



Canadian Facts, a division of SK/CF Inc.

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FOREWORDBackground

The leading edge of recent trends by smokers with health anxieties to trade down to lower T&N brands, are these who have adopted brands in the 5 and under T&N range, as an alternative to quitting altogether. In the spring of '82 this represented around 8% of cigarette smokers. (Monitor - Spring 1982)

These brands, and particularly those at the 1 mg level, have been promoted entirely on the basis that they have a very low/lowest tar count, on the assumption that this is the only reason for choosing such a bland cigarette.

During early '82, qualitative research, directed primarily towards other objectives, was providing some indications that smokers of these low tar brands were perceiving other virtues in their selections. It was hypothesized that these low tar brands might well have distinctive images, at least in the perceptions of the low tar segments, and that other qualities had a significant role to play in brand choice. If such were the case, Imperial Tobacco's marketing strategy for this segment warranted at least a review. The implications for Medallion were of particular importance.

Purpose

The purpose of this study, therefore, was to examine brand imagery and smoker motivations within the Very Low and Ultra Low segments.

Method

The study was conducted by personal interview, using cigarette package fronts to minimize brand confusion, and sorting boards to simplify and lighten the scaling tasks demanded of respondent. (It was essentially the same procedure, and largely the same questionnaire, as used in the major Spring 1982 image study.)

The interviews were conducted in our Consumer Opinion Centre locations in Toronto, Winnipeg, and Vancouver during the month of June, 1982. Respondents were recruited on the basis of usual brand (very low and ultra low segments), with a restriction of not more than 1 in 3 to be smokers of Matinee Extra Mild. A total of 244 interviews were completed, distributed as follows:

<u>Total</u>	244	<u>Usual brand</u>	
Masculine	94	Matinee extra mild	80
Feminine	150	Craven A special mild	37
		Viscount extra mild	23
<u>Age</u>		Other very low	<u>42</u>
Under 25	62	Total very low	181
25 to 34	51	Medallion	42
35 to 49	50	Other ultra mild	<u>21</u>
50 plus	76	Total ultra mild	63
Not stated	5		

All interviewers were personally briefed and individually rehearsed on the survey procedures. A copy of the field instructions and questionnaire are appended to this report.

Q

Results

Results are summarized here-in under:

- Highlights
- General Summary
- Detailed Tables

Computer print-outs and a documented tape were originally made available to Imperial Tobacco in July 1982.

February, 1983

CANADIAN FACTS

F-3

6

HIGHLIGHTS

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HIGHLIGHTS

A. Switching Trends

- ① This survey of Very Low and Ultra Low segment smokers only partially supports the proposition that they have reached their current brand by a step by step downgrading T&N.

More of the Very Low smokers had come directly from brands of 14 mg and above than came from the 6-12 mg range.

The previous brand of the Ultra Low smokers were evenly divided between the 14+, the 6-12, and the Very Low segments.

- ① 11% of the Very Low smokers came from other Very Low brands, and 6% of the Ultra's came from other Ultra brands.

- ① By a large Very Low smokers say they intend to stay in their present segment, but otherwise the alternative is as apt to be of a higher T&N segment as it is to be of a lower one.

- ① Almost half the Ultra's say they'd stay in their present segment or go to an even lower TN. Close to as many say they'd move upwards, largely to a Very Low brand.

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B. Reasons for choosing low T&N brands

- ① The paramount reason for switching to an LTN brand is still the search for a safer and milder smoke.
- ① While switching to an LTN brand may have alleviated his health anxieties to some extent, the LTN smoker remains as concerned about his health and as wishful to be able to quit as his neighbor who smokes a brand in the higher T&N ranges.
- ① The LTN smoker is still looking for something that is more satisfying, with more taste, but yet with no higher and maybe even lower T&N.
- ① He is also looking for a younger more masculine image brand.

? MILDNESS  
PEEL FILTER

C. Brand Images

- ① This study clearly indicates that LTN smokers see significant differences in brand image as between the 10 brands included in the study. (12 in Toronto)
- ① The pattern of these differences is not merely rationalization based on the relative levels of T&N - actual or perceived.

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D. Medallion

① Relative to this peer group, Medallion is perceived to have a low T&N rating, and to have very little taste and satisfaction. On the other hand it gets a good, but not the best rating on health safety.

On the other five image criteria that were applied, Medallion is positioned pretty well in the middle of the pack.

② Thus while achieving generally acceptable image ratings on most criteria, Medallion is seen to be sadly lacking in amount of taste and satisfaction. Its low TN rating does not seem to translate into enough health reassurance to make this an acceptable trade off for most LTN smokers.

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GENERAL SUMMARY

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GENERAL SUMMARY

A. Switching Trends

1. To state the obvious, the smokers in the LTN segments tend to be "Johnny come lately" to their current brands. As of June '82 some 1 in 3 had been smoking it for a year or less, while 1 in 5 had been smoking it for a claimed 4 years or more.

Comparable figures are shown below for the smoker population as a whole, taken from Monitor Spring '82 data.

<u>Length of time smoking present usual brand</u>	<u>Total LTN*</u>	<u>All smokers</u>	<u>Canadian Cigarette</u>	
	(244) %	(2250) %	<u>LTN*</u> (117)	<u>All Smokers</u> (1133)
Less than 3 months	7	4	1	3
3 to 6 months	8	4	15	3
6 to 12 months	15	7		
1 to 2 years	19	15		
2 to 4 years	28	16		
Over 4 years	21	52		
Vague	2	2		

(Derived from Detailed Table, Page 1)

\* Scale: 1000  
 1000 population  
 • Source: F&T 1982

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2. The present LTN segment only partially conforms to the "trickle down" theory where a health concerned smoker trades down gradually to lower and lower TN brands.

Some 39% of these LTN smokers had switched directly from brands generally in the 14+ TN segments. By comparison 30% came the shorter distance from the 6-12 TN range. And finally another 19% came from other brands in the 5 or under range. (The missing 12% was not clearly classifiable on a segment basis.)

Based on the rather small sample available, the former brand of the Ultra Low smokers exhibits a different pattern: 30% come from very low brands, and 6% came from other ultra lows. Nevertheless another 29% jumped directly from the 14+ TN levels.

<u>Previous Brand Segment</u>	<u>Total LTN</u> (244) %	<u>Any Very Low</u> (181) %	<u>Any Ultra</u> (63) %
High/High light/Mid	39	42	29
Mid light/Trad low/Special	30	30	27
Very Low	16	11	30
Ultra Low	3	2	6
Other	12	15	8

3. To the hypothetical question of what brand do you think you'd switch to, if you switched within the next year, about 1 in 5 ducked the question, but only 1 in 20 by saying he would quit.

About 1 in 4 opted for another brand in the same segment (28% of the "very lows" and 21% of the "ultra lows"). In the Very Low group more (1 in 4) said they would move higher than said they would move lower (1 in 5).

The Ultra Lows were less prepared to switch at all, but if they were to move out of their segment they tended to want to go up just one step.

In summary it would seem that to a substantial number of LTN smokers a higher TN brand is the most acceptable option. Even among the Ultra Light smokers 42% are prepared to move upwards, compared to the 53% only willing to switch within their segment or to find an even lighter alternative or to quit smoking entirely.

Hypothetical Next Brand (Segment)	Total LTN	Any Very Low	Any Ultra
	(244)	(181)	(63)
	%	%	%
High/High light/Mid	8	9	5
Mid light/Trad low/Special	14	16	10
Very Low	28	28	27
Ultra Low	12	8	21
A milder/lighter	9	10	8
Vague	10	11	5
Would not switch	14	12	19
Would quit	5	6	5

(Derived from Detailed Tables, Pp. 21 to 54)

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B. Reasons for choosing LTN brands

4. While it might be inferred from recent switching patterns and hypothetical future intentions that low tar is not the only reason for choosing an LTN brand, it clearly remains the paramount reason.

LTN smokers moved to their current brand because it was perceived to be milder, better for their health, or a way to reduce the TN intake.

<u>Volunteered reasons for latest brand switch</u>	<u>Total</u> (244) %	<u>Very Low</u> (181) %	<u>Ultra Low</u> (63) %
Better taste/satisfaction	11	12	11
Towards mildness	118	118	116
Health reasons	11	10	13
Trying to cut down/quit	9	9	11
Misc. and vague	20	23	8
No previous brand	1	1	2

Adds to more than 100% as many gave several reasons.

(Derived from Detailed Tables, Pp. 33 & 34)

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D

5. LTN smokers are only slightly more concerned about the health aspects of smoking than are the general run of smokers. Or to put it the other way, smoking an LTN brand seems to do very little to alleviate the general health concerns of any smoker, to lessen the yearning to quit, or to reduce his sensitivity to social pressures.

	<u>LTN Smokers</u>	<u>All Smokers</u>
	(244)	(2281)
	%	%
Have tried to quit	76	81
<u>Seriousness about quitting</u>		
Very serious	32	32
Fairly serious	32	30
Not very serious	22	25
Not at all serious	14	13
<u>Concerned about effects of smoking on own health</u>		
Very concerned	30	24
Quite concerned	23	24
A little concerned	30	26
Not very concerned	9	14
Not at all concerned	7	11
<u>Degree of social pressure felt to change behaviour</u>		
A great deal	19	18
A fair amount	34	30
Not very much	29	27
None	16	24

(Derived from Detailed Tables, Pp. 161 & 165  
& Spring '82 Monitor)

K



6. The concept of consonance/dissonance developed by BAT to measure the attitude of smokers towards smoking was applied in this interview. (It was also applied in the Spring '82 Monitor study.)

Very briefly this divides smokers into 4 groups.

Highly consonant - Doesn't want to quit and hasn't tried.

Consonant - Has tried to quit, but does not now want to quit.

Dissonant - Wants to quit, but hasn't tried.

Highly dissonant - Wants to quit and has tried to quit.

Better than half the LTN smokers are found in the unhappy "highly dissonant" category. However the pattern among the LTN smokers does not differ significantly from the profile of all Canadian smokers in mid '83. (This level of dissonance is incidentally somewhat greater than found in the UK studies of '79 & '80.)

Again this can be expressed the other way: smoking an LTN brand does not reduce the feeling of dissonance felt by smokers of stronger brands.

	<u>LTN Smokers</u> (244)	<u>All Smokers</u> (2281)
<u>Attitude towards smoking</u>	§	§
Highly consonant	15	13
Consonant	22	25
Dissonant	9	6
Highly dissonant	54	56

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7. Nevertheless LTN smokers do seem to feel that their choice of a low T&N brand has made them less concerned about their health.

By definition, the consonant smokers feel more relieved than the dissonants who are still yearning to quit.

<u>Effect of low T&amp;N cigarettes on health concerns</u>	<u>Total</u>	<u>Consonant</u>	<u>Dissonant</u>
	(241)	(87)	(154)
	%	%	%

Smoking low T&N makes me feel:

A lot less concerned	17	20	15
Somewhat less concerned	46	54	42
Just as concerned	37	26	43

(Derived from Detailed Table, Page 168)

①

8. Respondents were asked to rate their own brand and their ideal cigarette on 8 semantic differential scales. Results are summarized graphically on the next page.

Their own brand is well rated for being satisfying, having lots of taste, and very appropriate for someone who worries about his health.

It is conceded to be smoked more by older people and more by women, and by people not very particular about pack appearance.

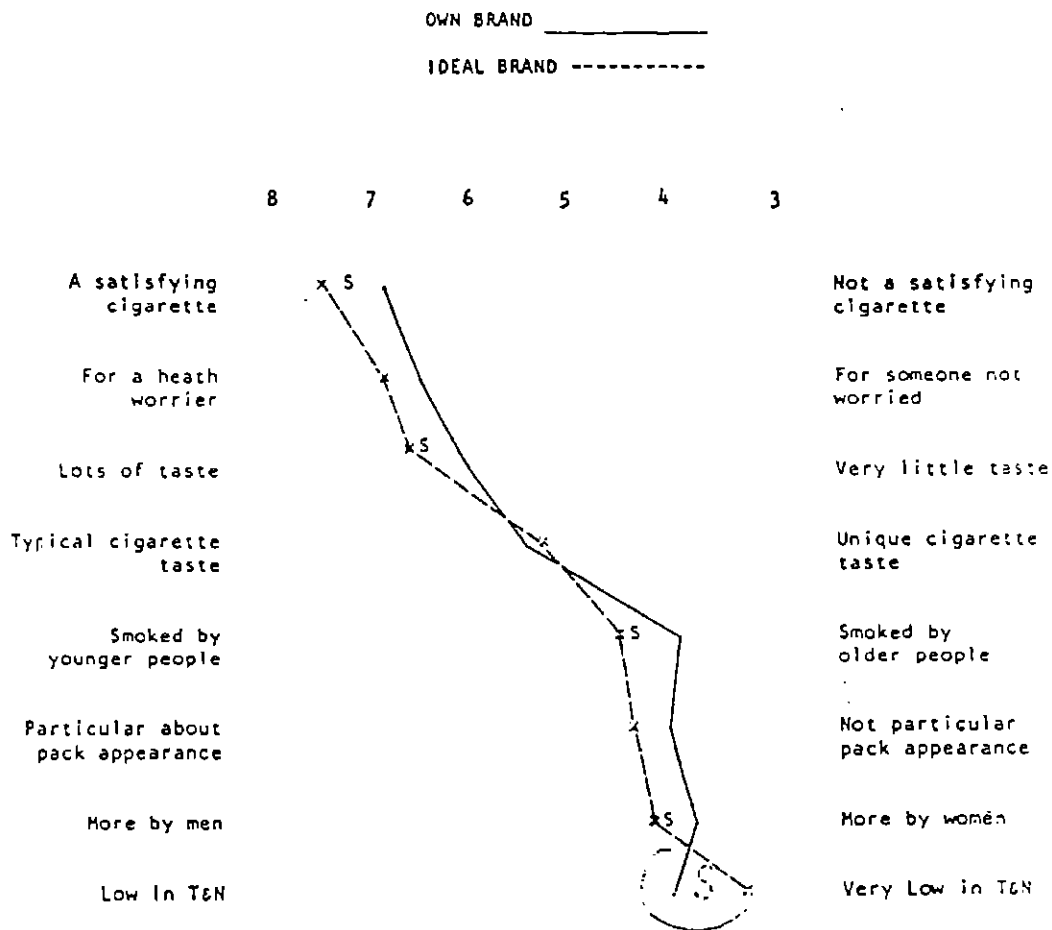
It scores in the middle of the road on typical vs unique taste. Finally it scores well down in the perceived T&N range.

Comparing this rating with the ideal it is clear that the LTN smoker would like more taste, more satisfaction, and maybe even lower T&N.

He would evidently also prefer a brand with a more youthful and more masculine image.

That is to say he sees room for improvement over his present choice on certain criteria, but not if it means going to a higher T&N rating.

②



(Derived from Detailed Tables, Pp. 76, 77 & 82, 83)

①

C. Brand Image

9. Each respondent was required to rate each of the other brands included in this study on the same criteria as for his own and his "ideal". One additional dimension was added for these other brands: "Happy to smoke ... Never could smoke".

On the following pages we have summarized the average rating scores for each brand and show them listed in rank order, dimension by dimension. In each case own brand ratings are excluded to eliminate bias due to the number of smokers of any particular brand in the sample, thus Matinee Extra Mild ratings are based on the 160 smokers of brands other than Matinee Extra Mild, and Accord ratings are based on the 222 smokers of brands other than Accord. (This filter was not applied in the original tables delivered in July '82, so the reader will note some significant variations from the data presented at that time.)

Because of the small sizes and closeness of some scores, the standard errors are also included in the summary. As a rule of thumb the difference between two mean ratings becomes statistically significant at .95 when it exceeds three times the standard error.

The nine criteria are discussed in the same descending order as presented on the previous page. However, so as not to lose sight of the forest through too close examination of the trees, the salient point is that many of these brands appear to have significantly different images on many of these criteria. Clearly "all LTH brands are not the same in the dark."



10. Degree of satisfaction

Three brands head the list with similar scores, and six are closely bunched at the bottom.

Craven A Ultra floats close to the top three, but yet significantly lower than Craven A Special Mild.

While there are only narrow differences between individuals in "the pack", Viscount Extra Mild does rate as more satisfying than Medallion.

The 59 respondents who rated the Selects put them both in the general not satisfying end of the scale.

Quality - Satisfying/Not satisfying

	<u>Std Error</u>	<u>Average rating</u>
Craven A Special Mild	17	5.2
Matinee Extra Mild	19	5.1
Peter Jackson Extra Mild	19	4.9
Craven A Ultra Light	17	4.7
Viscount Extra Mild	16	4.3
Vantage	16	4.2
Accord	16	4.0
Vantage Light	14	4.0
Viscount #1 Ultra Light	16	3.8
Medallion	18	3.8
Select	35	4.3 *
Select ultra	37	4.0 *

\* Based on only 59 respondents

(Derived from Detailed Tables, Pp. 112, 113)

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11. Health concern

The brands are well separated on the basis of health concern. The two lmg. brands top the list, as might be expected, but Viscount Extra Mild, and Matinee Extra Mild score almost as well.

Peter Jackson Extra Light and Vantage are not perceived as appropriate for the health concerned.

The new Macdonald brands seem to be well positioned.

Quality - Worried about health/Not worried

	<u>Std Error</u>	<u>Average rating</u>
Viscount #1 ultra	17	6.1
Medallion	19	5.6
Viscount Extra Mild	15	5.6
Matinee Extra Mild	18	5.5
Vantage Light	15	5.2
Craven A Ultra Light	17	5.1
Craven Special Mild	17	5.0
Accord	17	5.0
Vantage	17	4.4
Peter Jackson Extra Mild	20	4.1
Select ultra	34	5.7 #
Select	31	5.1 #

(Derived from Detailed Tables, P.p 120, 121)

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12. Amount of taste

Logically enough the same three brands scoring top on satisfaction also top the list on taste. However there is more dispersion among the others, though the two lmg brands are clearly segregated at the bottom.

At the time of this study the two Selects do not seem to have established a clear image: both were given a middle ground rating on amount of taste.

Quality - Lots/Very little taste

	<u>Std Error</u>	<u>Average rating</u>
- Peter Jackson Extra Mild	19	5.5
- Craven A Special Mild	17	5.3
- Matinée Extra Mild	20	5.0
Vantage	16	4.5
Craven A Ultra	16	4.4
Viscount Extra Mild	15	4.0
Accord	15	4.0
Vantage Light	15	3.9
Medallion	16	3.5
Viscount #1 Ultra	15	3.3
Select	29	3.9 *
Select ultra	34	3.8 *

(Derived from Detailed Tables, Pp. 86, 89)



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13. Unique taste

Once again this study suggests Accord's alleged unique taste largely escapes consumer perceptions.

Peter Jackson Extra Light is perceived as relatively more typical (i.e. more like the general run of higher TN brands?), but the other brands remain closely bunched.

However Accord does achieve the most "unique taste" score, by a narrow margin.

Quality - Typical/Unique cigarette taste

	<u>Std error</u>	<u>Average rating</u>
Peter Jackson Extra Mild	19	5.8
Craven A Special Mild	17	5.3
Vantage	16	5.2
Matinee Extra Mild	18	5.1
Vantage Light	16	5.0
Craven A Ultra Light	15	5.0
Medallion	18	5.0
Viscount Extra Mild	16	4.9
Viscount #1 Ultra Light	16	4.7
Accord	16	4.6
Select	33	5.3 *
Select ultra	34	5.1 *

(Derived from Detailed Tables, Pp. 144, 145)

14.

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14. Youthfulness

This attribute, noted in para 8 as a yearning of LTN smokers, segments this list of brands to a certain degree.

Peter Jackson Extra Light has the best, and Medallion the poorest rating on this dimension.

Although Viscount Ultra shares Medallion's lowly rating it does not seem to be just a matter of T & N content - Matinee Extra Mild and Craven A Special Mild score better than might be expected.

Quality - Smoked more by younger/... older

	<u>Std error</u>	<u>Average rating</u>
Peter Jackson Extra Light	20	5.4
Matinee Extra Mild	20	5.2
Vantage	16	5.1
Craven A Special Mild	17	5.0
Vantage Light	17	4.7
Craven A Ultra Light	15	4.6
Viscount Extra Mild	14	4.5
Accord	15	4.4
Viscount Ultra Light	15	4.3
Medallion	16	4.1
Select ultra	31	4.4 ±
Select	32	4.3 ±

(Derived from Detailed Tables, Pp. 128, 129)

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15. Pack Appearance

These LTN smokers tended to deny the influence of package appearance on brand choice, and indeed all brands were given much the same rating on this criterion, with two exceptions: The Select packages and that of Peter Jackson Extra Light tended to be seen as brands for people who cared about pack appearance.

Quality - Particular about pack/Not particular

	<u>Std error</u>	<u>Average rating</u>
Peter Jackson Extra Light	20	5.4
Craven A Special Mild	16	4.9
Matinée Extra Mild	18	4.8
Craven A Ultra Light	16	4.7
Accord	17	4.7
Medallion	18	4.7
Viscount Extra Mild	15	4.6
Viscount #1 Ultra Light	15	4.6
Vantage	16	4.1
Vantage Light	15	3.9
Select	34	6.0 *
Select ultra	35	5.8 *

(Derived from Detailed Tables, Pp. 136-137)

16. Masculinity

A more masculine brand was one of the ideals of these LTH smokers.  
Peter Jackson Extra Light stands alone on this basis.

Vantage and Craven A Special Mild enjoy some advantage over the  
others rated, with Viscount #1 Ultra seen as the most feminine.

Quality - Smoke more by men/... women

	<u>Std error</u>	<u>Average rating</u>
Peter Jackson Extra Light	17	6.7
Vantage	16	5.1
Craven A Special Mild	17	5.1
Accord	15	4.6
Craven A Ultra Light	16	4.4
Viscount Extra Mild	15	4.4
Matinée Extra Mild	19	4.3
Vantage Light	15	4.2
Medallion	17	4.2
Viscount #1 Ultra	14	3.7
Select	35	4.9 *
Select ultra	37	4.4 *

(Derived from Detailed Tables, Pp. 104, 105)

17. Tar/Nicotine level

Other things being equal, these smokers would like even lower TN levels than they currently smoke, and with a couple of exceptions they seem to have a fairly accurate perception of the relative ratings. Matinee Extra Mild is perceived as having lower T&N than Craven A Special Mild, and Viscount #1 Ultra is possibly viewed as lower than Medallion. Vantage is perceived to have lower levels than is in fact the case. Again the Select brands seem initially well positioned to fit the Very Low and Ultra Low market segments.

Quality - Low T&N/Very Low T&N

	<u>Std Error</u>	<u>Actual Tar Level</u>	<u>Average Rating</u>
Peter Jackson Extra Light	18	7	5.8
Vantage	16	10	5.4
Craven A Special Mild	15	4	5.2
Matinee Extra Mild	17	4	4.7
Vantage Light	16	5	4.4
Craven A Ultra	16	1	4.4
Accord	16	3	4.4
Viscount Extra Mild	15	3	4.2
Medallion	15	1	3.9
Viscount #1 Ultra	16	.7	3.6
Select	30	4	4.6 *
Select ultra	32	1	3.7 *

(Derived from Detailed Tables, Pp. 96, 97)

18. Acceptability*atypical taste?!*

The pecking order on "Happy to smoke ... Unhappy" more or less follows market share, with two exceptions. Both Medallion and Accord received lower ratings than their popularity in the market place might lead one to anticipate.

Quality - Happy to smoke/Never could smoke

	<u>Std Error</u>	<u>Share of Market Monitor '82</u>	<u>Average rating</u>
Matinée Extra Mild	20	2.4	5.1
Craven A Special Mild	18	0.6	4.9
Craven A Ultra	19	0.5	4.8
Medallion	19	1.3	4.3
Viscount Extra Mild	15	0.4	4.2
Viscount #1 Ultra	16	0.5	4.1
Vantage	16	0.9	4.0
Vantage Light	16	0.1	3.9
Peter Jackson Extra Mild	19	0.1	3.8
Accord	15	0.4	3.8
Select	33		3.9 *
Select ultra	36		3.9 *

(Derived from Detailed Tables, Pp. 152, 153)

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D. Medallion

19. Some 60% of this assorted sample of LTN smokers had at least tried Medallion and therefore could make some evaluations based on actual physical experience. Fewer than 1 in 10 claimed complete ignorance.

These figures have no meaning in a marketing context since they come from an atypical quota sample of smokers. They indicate that the Medallion image has had a chance to register on most of those interviewed.

Familiarity with Medallion

	<u>All LTN smokers</u> (244)
	%
Purchased	37
Tried	24
Only seen/Heard of	31
Never heard of	8

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and most dissonant smokers tended to be particularly tempted  
 Medallion appeal. However the brand does not seem to have  
 particular skew on the basis of age or sex - in the context of  
 segment as a whole.

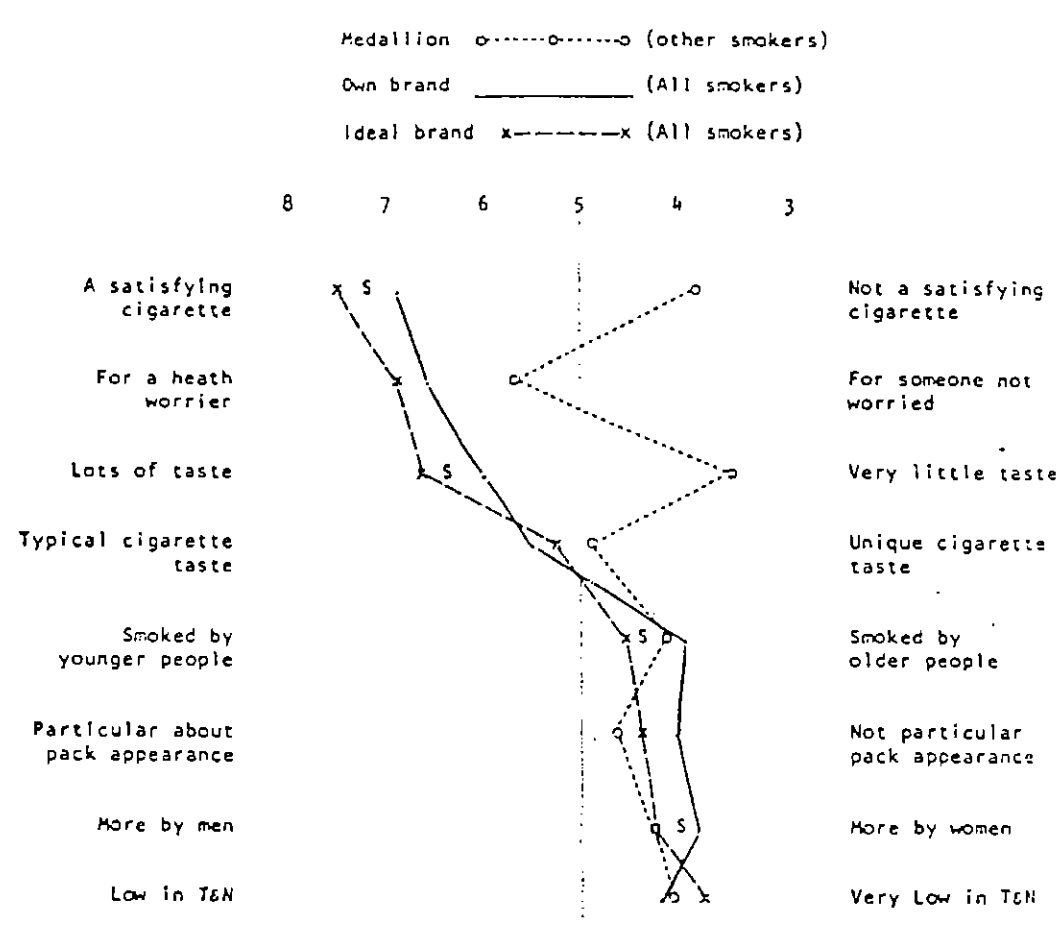
	FAMILIARITY		
	Purchased	Only tried	Only seen/heard
	(91) %	(59) %	(74) %
.....ne	42	37	39
.....	58	63	61
.....5 years	22	24	26
	23	21	23
	29	16	17
	26	29	32
.....smoker	27	15	36
.....smoker	45	56	54
.....smoker	28	29	10
.....consonant	8	20	16
.....t	17	27	24
.....t	9	2	15
.....dissonant	66	51	45

(Derived from Detailed Tables, P.p. 65, 73)



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21. Medallion's great weakness, in the eyes of these LTN smokers, is in the area of taste and satisfaction. (Although these same data appear in the preceding section in a different format, the graph below dramatizes this vulnerability.) It's healthfulness rating does not seem to suggest that people will necessarily accept the taste/satisfaction failing as a tolerable trade-off for greater safety.



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APPENDIX

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EXPLANATION OF NOTATIONS USED IN THE DETAILED TABLES

- \* Frequency  $> 1$
- Rounded Percent = 0
- Percent = 0

NOTES: Percentages derived from "actual" bases of less than 100 should be interpreted with caution.

Percentages derived from "actual" bases of less than 50 should be interpreted with extreme caution.

All sub-totals in the detailed tables are correct even though the items listed below any sub-total may not exactly add to the sub-total through computer "rounding" (applies to (1) weighted frequencies where decimal not shown or (2) where percent shown without decimal).

STANDARD DEVIATION

The Standard Deviation is calculated by taking the square root of the variance around the mean. It is a summary statistic of variation printed below the mean. The Standard Deviation gives an idea of the likely variation around the mean if we are simply considering the mean as a descriptive statistic. When Standard Deviation scores are small relative to the means, means can be taken as good representations of the individual scores.

STANDARD ERROR

The Standard Error is calculated by dividing the Standard Deviation by the square root of the sample size. The Standard Error indicates the likely deviations that can be expected, and therefore the confidence limits.

For example, mean  $\pm 2$  standard errors will include the "true mean" 95% of the time.