

HISPANIC ORIENTATION

NOVEMBER, 1993

MHMPPMO/AMN  
OCTOBER 1993

2044424613

**AGENDA:**

- . LBCo. HISPANIC MEDIA UNIT
  - OUR MISSION
  - HOW WE FUNCTION
- . THE U.S. HISPANIC MARKET
  - DEMOGRAPHICS
- . WHY ARE HISPANICS IMPORTANT TO PM?
- . HISPANIC MEDIA
  - OPTIONS AVAILABLE TO PM
  - OPPORTUNITIES AND ISSUES
- . TOBACCO CATEGORY COMPETITIVE OVERVIEW



LBCo. HISPANIC MEDIA UNIT

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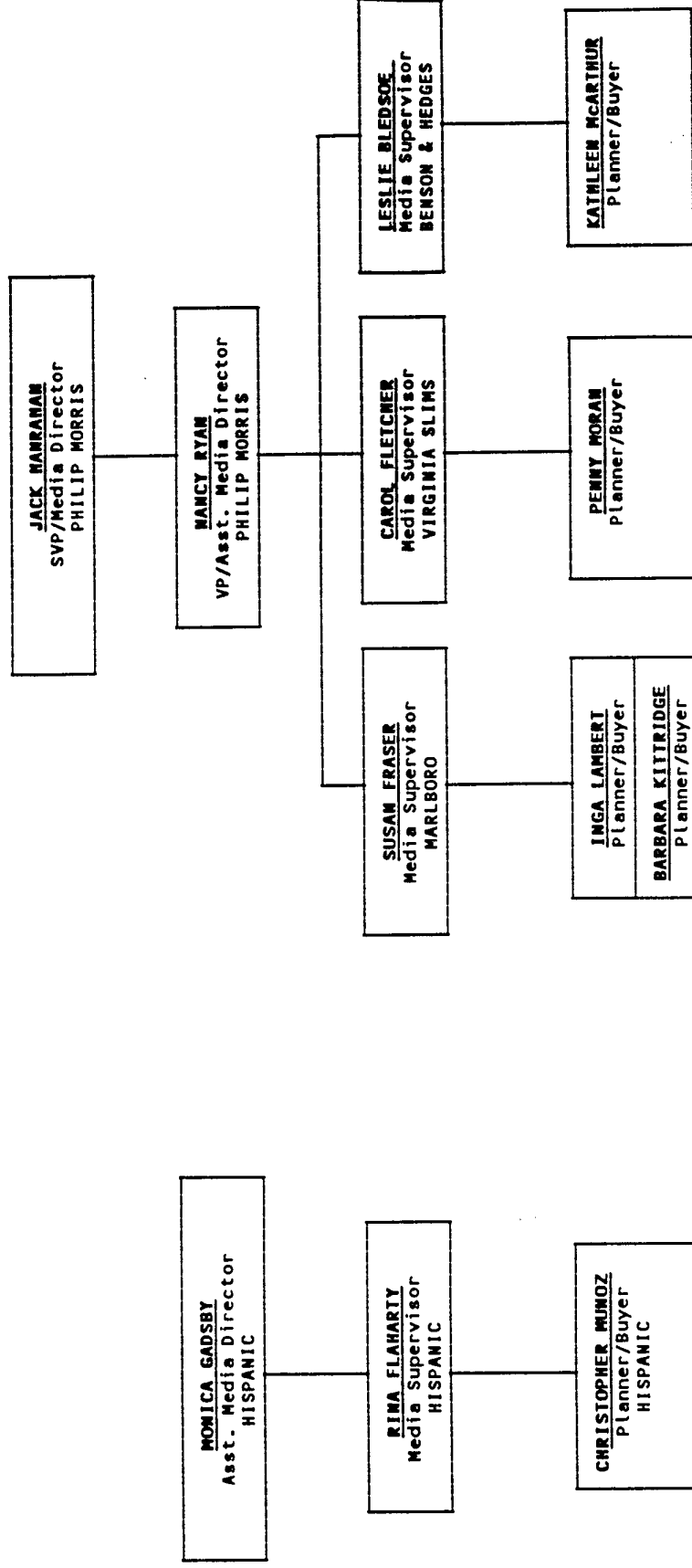
## OUR MISSION

- . THE LEO BURNETT HISPANIC TEAM IS COMPRISED OF EXPERTS ACROSS ALL AGENCY DEPARTMENTS, WITH THE MISSION OF DEVELOPING SUPERIOR HISPANIC ADVERTISING FOR OUR CLIENTS
  - "AGENCY WITHIN AN AGENCY"
- . AS HISPANIC MEDIA EXPERTS, OUR MISSION IS TO DEVELOP THE BEST HISPANIC MEDIA PLANS FOR OUR CLIENTS
  - WE STRIVE TO ACHIEVE THE SAME STANDARDS OF QUALITY WE FOLLOW IN OUR GENERAL MARKET PLANS, IN SPITE OF THE LIMITATIONS OF HISPANIC MEDIA SOURCES/TOOLS



## HOW WE FUNCTION

- WE ARE PART OF LEO BURNETT'S "INTEGRATED" APPROACH TO COMMUNICATIONS
- WE WORK IN TANDEM WITH OUR GENERAL MARKET MEDIA COUNTERPARTS
- WE PROVIDE OUR EXPERTISE ON HISPANIC MEDIA AND INSIGHTS ON HISPANIC CONSUMERS' VALUES, HABITS, AND ATTITUDES
- OUR GENERAL MARKET COUNTERPARTS PROVIDE THE EXPERTISE ON THE CLIENT'S BUSINESS



THE U.S. HISPANIC MARKET

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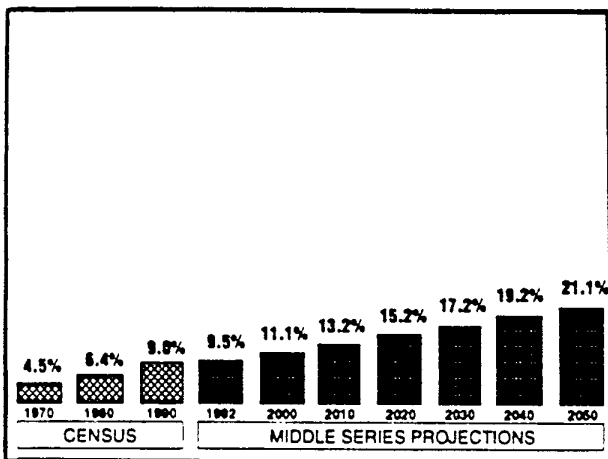


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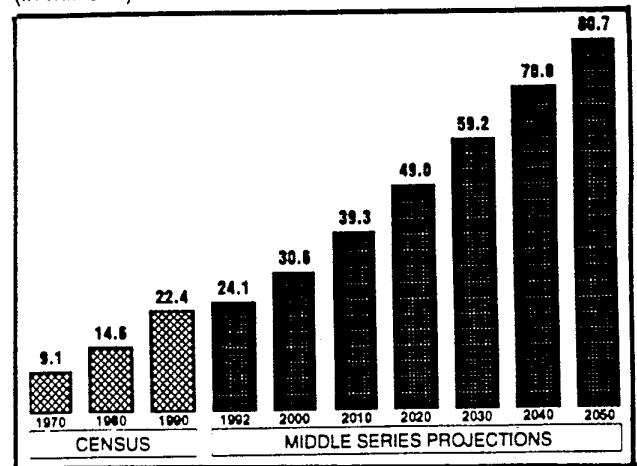
## HISPANICS ARE THE FASTEST GROWING MINORITY IN THE U.S.

- . AN ESTIMATED 24.1MM HISPANICS LIVE IN THE U.S. TODAY
  - 9% TO 10% OF TOTAL POPULATION
- . BETWEEN 1980 AND 1990, THE U.S. HISPANIC POPULATION GREW BY +53%
  - ANGLO POPULATION GREW BY +6%
  - AFRICAN-AMERICAN POPULATION GREW BY +13%
- . U.S. CENSUS BUREAU PROJECTS THAT BY THE YEAR 2010, 39.3MM HISPANICS WILL LIVE IN THE U.S., COMPRISING THE LARGEST SUBGROUP IN THE COUNTRY
  - HEAVY IMMIGRATION EXPECTED TO CONTINUE
  - HISPANIC BIRTH RATE 50% HIGHER THAN GENERAL MARKET'S

HISPANIC POPULATION: 1970 to 2050  
(Percent of total population)



HISPANIC POPULATION GROWTH: 1970 to 2050  
(in millions)



SOURCE: U.S. CENSUS

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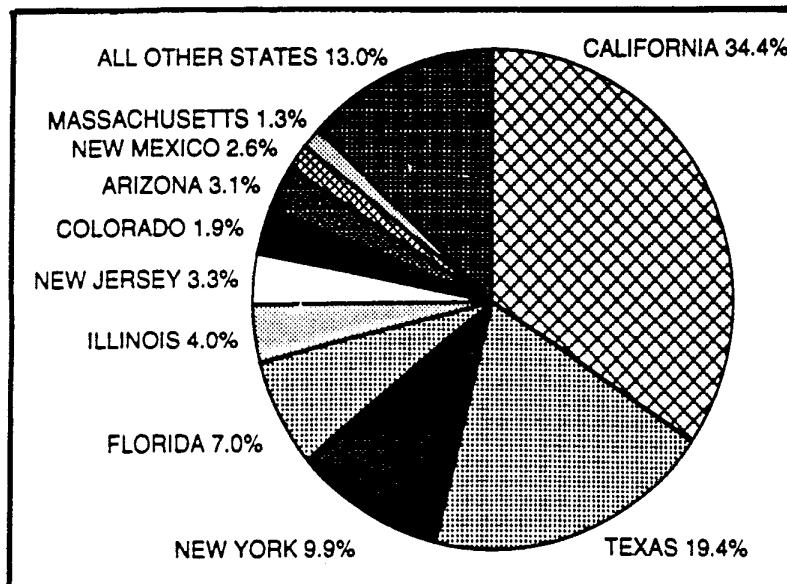


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**HISPANICS ARE THE MOST GEOGRAPHICALLY CONCENTRATED GROUP IN THE U.S.**

- . 87% OF U.S. HISPANICS RESIDE IN 10 STATES
  - 53.8% LIVE IN TEXAS AND CALIFORNIA
- . EASILY TARGETABLE

**HISPANIC POPULATION FOR SELECTED STATES:  
1990 (Percent distribution)**



SOURCE: U.S. CENSUS

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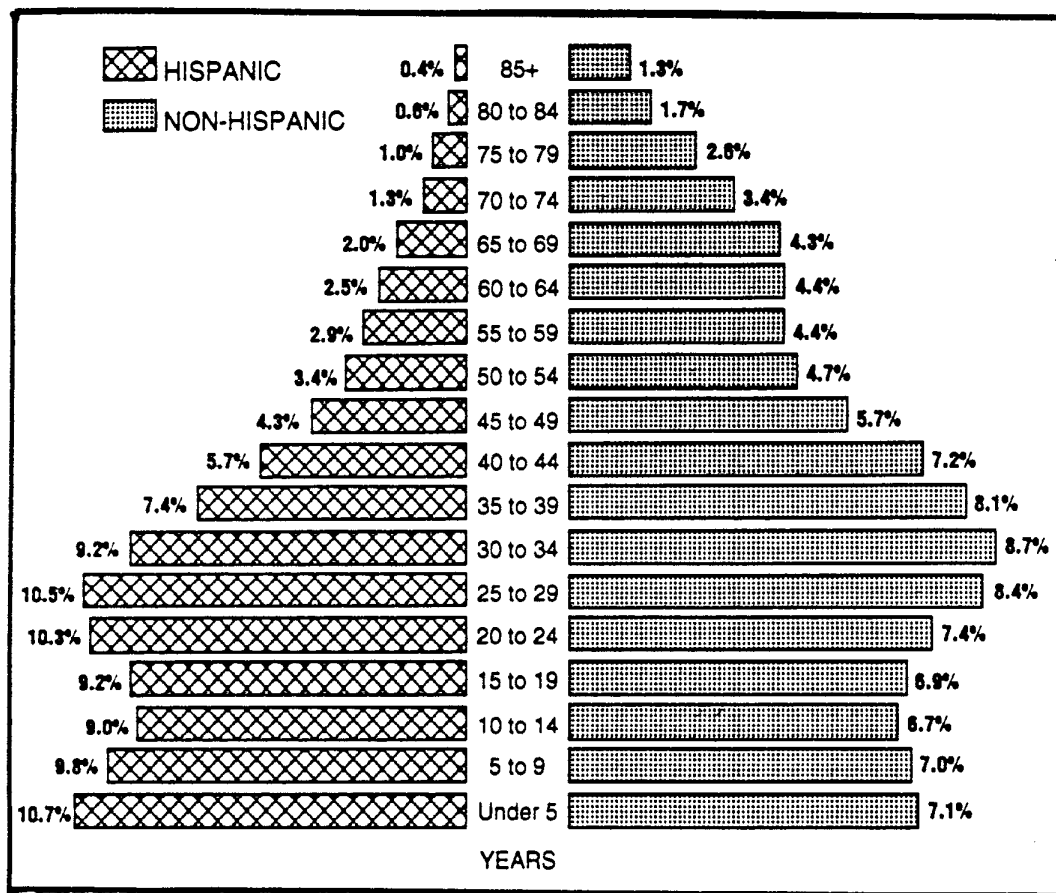
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## HISPANICS ARE YOUNGER THAN THEIR GENERAL MARKET COUNTERPARTS

- . MEDIAN AGE IS 26 VERSUS 34 FOR TOTAL U.S. POPULATION
- LESS SET IN CONSUMING HABITS

### AGE OF THE POPULATION: 1990



SOURCE: U.S. CENSUS

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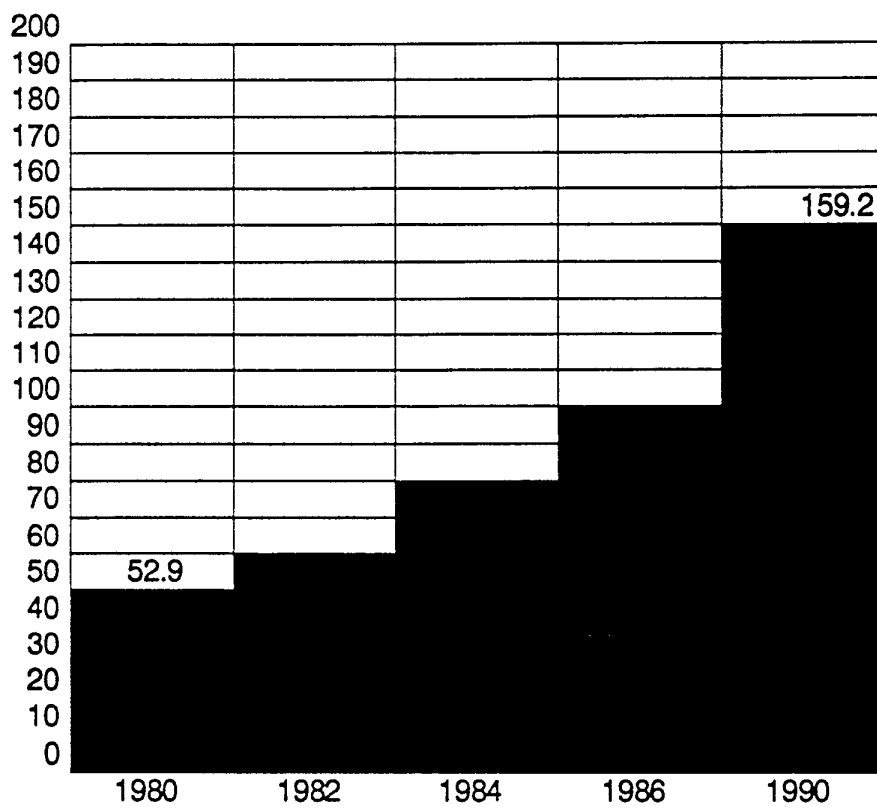


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IN 1990, U.S. HISPANICS ENJOYED A PURCHASING POWER OF \$159.2 BILLION

- INCREASING AT A RATE OF 12% PER YEAR

HISPANIC BUYING POWER  
(BILLIONS)



## SPANISH IS THE LANGUAGE OF PREFERENCE AMONG U.S. HISPANICS

- . 88% USE SPANISH IN SOME ASPECT OF THEIR LIVES
  - 70% CLAIM THEY USE SPANISH MOST OF THE TIME

### Language/Hispanic Orientation

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#### Language

		Hispanic MONITOR		
		1988	1990	1992
		%	%	%
Language Spoken at Home:				
Spanish all the time		43	50	62
Spanish more than English	> Spanish dominant	13 > 56	13 > 63	8 > 70
Spanish/English equally		23	19	17
English more than Spanish		14	11	10
English all the time	> English dominant	7 > 21	7 > 18	3 > 13
Language Preferred:				
Spanish		34 > 77	39 > 77	43 > 88
Both equally		43	38	45
English		23	23	12

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SOURCE: 1992 YANKELOVICH

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HISPANICS ARE NOT ASSIMILATING INTO MAINSTREAM AMERICA LIKE MOST  
OTHER IMMIGRANT GROUPS

- INSTEAD, THEY ARE ACCULTURATING
  - . THEY ADOPT MANY OF THE SO CALLED "AMERICAN MAINSTREAM" VALUES, WHILE RETAINING THEIR OWN IDENTITY/CULTURAL VALUES
  - . INTERESTINGLY, THEY ACTUALLY SEEM TO BE REDENFINING "MAINSTREAM" AS THEY INFLUENCE TODAY'S SOCIETY WITH THEIR VALUES AND CULTURE
    - FOOD, MUSIC AND OTHER ASPECTS OF ETHNIC CULTURES ALREADY A KEY COMPONENT OF MAINSTREAM AMERICA
  - . ASSIMILATION IS NOT A NECESSITY



WHY ARE HISPANICS IMPORTANT TO PM?

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**SMOKING INCIDENCE AMONG HISPANICS IS LOWER THAN INCIDENCE IN  
GENERAL MARKET**

- U.S. HISPANICS SMOKE AN AVERAGE OF 13.2 CIGARETTES A DAY  
VERSUS 24.4 FOR THEIR GENERAL MARKET COUNTERPARTS

AVERAGE DAILY CONSUMPTION				
	<sup>(1)</sup> WHITES		<sup>(2)</sup> HISPANICS	
	1990	1991	1990	1991
Light (1-19)	28.0%	25.8%	65.8%	70.2%
Medium (20)	20.9	20.8	17.1	13.9
Heavy (21-30)	36.9	38.9	12.2	11.6
Very Heavy (31+)	12.6	13.3	3.6	3.6
Average Per Day	24.1	24.4	13.7	13.2

(1) Roper  
(2) Hispanic Tracking

SOURCE: PM HISPANIC TRACKING STUDY

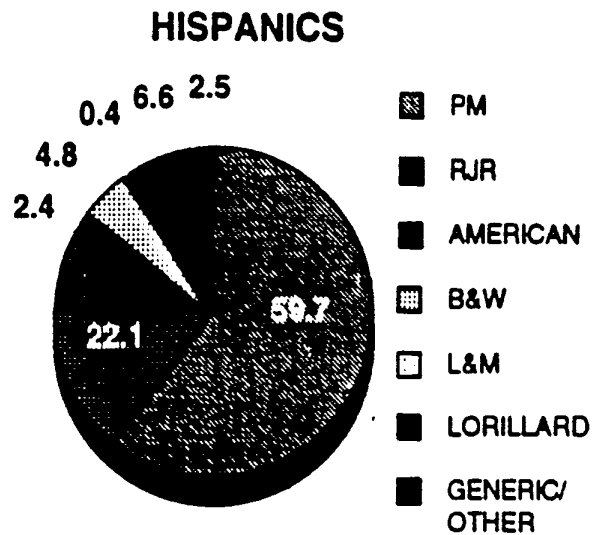
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PHILIP MORRIS BRANDS CURRENTLY ENJOY A 59.7% SHARE OF THE U.S.  
HISPANIC SMOKER MARKET



SOURCE: PM HISPANIC TRACKING STUDY

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**MARLBORO IS LEADING BRAND AMONG HISPANIC SMOKERS, WITH A 49.8% MARKET SHARE VS. 31.8% SHARE OF ANGLO SMOKERS**

- . MARLBORO HAS BEEN ADVERTISING TO U.S. HISPANICS FOR THE LAST 15+ YEARS
  - ALSO BENEFITS FROM LATIN AMERICAN HERITAGE
- . BENSON & HEDGES RANKS 4TH AMONG HISPANICS
  - 5.0% SHARE OF HISPANIC MARKET VS. 3.0% SHARE OF GENERAL MARKET
- . VIRGINIA SLIMS ALSO RANKS AMONG TOP 10 BRANDS IN HISPANIC MARKET

**10 MOST POPULAR BRANDS**

	<u>WHITES</u> <u>1991 (%)</u>		<u>HISPANICS</u> <u>1991 (%)</u>
MARLBORO	31.8	MARLBORO	49.8
WINSTON	8.6	WINSTON	10.2
SALEM	6.1	SALEM	6.3
CAMEL	4.7	BENSON & HEDGES	5.0
VIRGINIA SLIMS	3.8	NEWPORT	4.4
DORAL	3.8	KOOL	3.0
MERIT	3.7	CAMEL	2.9
KOOL	3.0	KENT	1.8
BENSON & HEDGES	3.0	VIRGINIA SLIMS	1.8
NEWPORT	2.7	DORAL	1.2
DISCOUNT	16.0	DISCOUNT	5.3

SOURCE: PM HISPANIC TRACKING STUDY

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BY THE YEAR 2010, PROJECT CIGARETTE VOLUME AMONG HISPANICS WILL  
AMOUNT TO MORE THAN 30 BILLION UNITS

. 20 BILLION UNITS WILL BE ATTRIBUTED TO PHILIP MORRIS BRANDS

39.3MM	U.S. HISPANICS
<u>x17.2%</u>	CIGARETTE PENETRATION
6.8MM	HISPANIC SMOKERS
<u>x13.2</u>	CIGARETTES/DAY
<u>x 365</u>	DAYS/YEAR
32.8B	TOTAL CIGARETTES
<u>x59.7</u>	PM SHARE
19.6B	TOTAL PROJECTED PM HISPANIC VOLUME



HISPANIC MEDIA

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## HISPANIC MEDIA

AS MORE MARKETERS RECOGNIZE THE IMMENSE POTENTIAL OF THE U.S.  
HISPANIC MARKET AND HISPANICS' NEED TO BE TALKED TO IN THEIR OWN  
LANGUAGE, NEW HISPANIC MEDIA CONTINUE TO EMERGE

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## SPANISH-LANGUAGE OUTDOOR

- . VARIOUS NATIONAL/LOCAL OPPORTUNITIES SOLD INDEPENDENTLY OR IN NETWORK
  - MAINLY AVAILABLE IN AREAS OF HIGH HISPANIC DENSITY
    - . 8-SHEETS MOST COMMONLY AVAILABLE IN HISPANIC AREAS
    - . BUS SHELTERS/SUBWAY CLOCKS ALSO A GOOD OPTION
    - . NEW OPPORTUNITY WITH KING SIZE POSTERS OUTSIDE HISPANIC GROCERY STORE WALLS
  - HOWEVER, MOST COMPANIES UNABLE TO QUANTIFY ACTUAL "HISPANIC" SHOWINGS



## HISPANIC MAGAZINES

THERE ARE APPROXIMATELY 59 DIFFERENT CONSUMER MAGAZINES TARGETING U.S. HISPANICS

- CATEGORIES AVAILABLE ARE STARTING TO MIRROR GENERAL MARKET CATEGORIES

- . GENERAL INTEREST - REPLICA, VISTA, READER'S DIGEST SELECCIONES

- . BUSINESS - HISPANIC BUSINESS - *Pro Child*

- . ENTERTAINMENT - TV Y NOVELAS, CRISTINA

- . FASHION - COSMOPOLITAN, IMAGEN

- . SPORTS - HISPANICS IN BOXING

- MAGAZINES IN ENGLISH TARGETING THE MORE ASSIMILATED HISPANICS ARE AN OPTION

- AT THIS POINT IN TIME, HOWEVER, MOST PUBLICATIONS STILL ENJOY A LIMITED CIRCULATION

- CURRENTLY, ONLY 45% OF U.S. HISPANIC MAGAZINES ARE AUDITED

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## HISPANIC NEWSPAPERS/SUPPLEMENTS

- THERE ARE 14 DAILY AND SOME 188 HISPANIC COMMUNITY NEWSPAPERS IN THE U.S. TODAY
  - . PROVIDE ESTIMATED 18.5% PENETRATION OF HISPANICS U.S.
  - . PRIMARILY CONCENTRATED IN TOP HISPANIC MARKETS
    - 80% OF CIRCULATION CONCENTRATED IN TOP NINE HISPANIC MARKETS
    - ONLY 2 OF TOP 20 HISPANIC MARKETS DO NOT HAVE A HISPANIC NEWSPAPER - CORPUS CHRISTI AND TUCSON
  - . JUST AS IN GENERAL-MARKET, HISPANIC NEWSPAPERS COME IN A WIDE RANGE OF FORMATS
    - SOME CONCENTRATE ON NEWS, OTHERS CONCENTRATE ON ENTERTAINMENT, ETC.
  - . CURRENTLY, ONLY 40% OF U.S. HISPANIC NEWSPAPERS ARE BEING AUDITED
- NEWSPAPER SUPPLEMENTS TARGETING THE HISPANIC POPULATION VIA GENERAL-MARKET NEWSPAPERS GROWING IN NUMBER
  - . ONE NATIONAL OPTION
    - VISTA
  - . FIVE LOCAL OPTIONS CONCENTRATED IN TEXAS, CALIFORNIA, NEW YORK AND CHICAGO



## SPANISH-LANGUAGE FSI's

- TWO NATIONAL HISPANIC FSI'S AVAILABLE
  - EL MERCADO POPULAR
    - . PUBLISHED IN SPANISH
    - . CIRCULATED IN 40 ADI'S THROUGH 68 MAJOR SPANISH-LANGUAGE NEWSPAPERS
      - 3.0MM TOTAL CIRCULATION
    - . SUPPORTED THROUGH A SPECIAL MERCHANDISING AND DISPLAY PROGRAM AT THE RETAIL LEVEL
    - . EIGHT DROP DATES AVAILABLE
  - NATIONAL HISPANIC FSI NETWORK
    - . PUBLISHED IN SPANISH
    - . CIRCULATED IN 30 ADI'S THROUGH MAJOR SPANISH-LANGUAGE NEWSPAPERS
      - 2.7MM CIRCULATION
    - . FIVE DROP DATES AVAILABLE
- TWO LOCAL HISPANIC FSI'S AVAILABLE
  - CUPONES CON IMPACTO
    - . PUBLISHED BY AND DISTRIBUTED THROUGH EL NUEVO HERALD IN MIAMI
      - 235M TOTAL CIRCULATION
    - . 5 DROP DATES FOR 1993
  - LA OPINION
    - . PUBLISHED BY AND DISTRIBUTED THROUGH LA OPINION IN LOS ANGELES
      - 121M TOTAL CIRCULATION
    - . 10 DROP DATES FOR 1993



## HISPANIC CO-OP COUPONING PROGRAMS

- THIS AREA HAS EXPERIENCED TREMENDOUS GROWTH IN THE LAST COUPLE OF YEARS
  - . FIVE MAJOR COUPON PROGRAMS AVAILABLE TO TARGET U.S. HISPANICS
    - COUPONS PLUS
      - . BILINGUAL
      - . REACHES HISPANICS IN HIGH-DENSITY HISPANIC AREAS VIA DIRECT MAIL AND IN-STORE DEMONSTRATIONS
        - COUPON PACKAGE SENT TO UNDUPLICATED SPANISH-LANGUAGE TV USERS WHO HAVE RESPONDED TO BROADCAST PROMOTIONS AND IDENTIFIED HISPANIC NEIGHBORHOODS
        - 2.3MM TOTAL CIRCULATION
        - THREE MAILING DATES
          - . EACH SUPPORTED BY A RADIO CAMPAIGN
    - VISTA SONIDO "GANE Y AHORRE"
      - . PUBLISHED IN SPANISH
      - . BOOKLET MAILED TO HISPANICS IN TOP 25 MARKETS
      - . PROGRAM ALSO INCLUDES BRANDED OUT-OF-HOME AND RADIO CAMPAIGN, TRADE MERCHANDISING SUPPORT, CONSUMER SWEEPSTAKES AND FREE SALES SCANNER DATA
      - . JOINT VENTURE BETWEEN CABALLERO RADIO AND GANNETT OUTDOOR
      - . 2.7MM CIRCULATION
        - REGIONAL CAPABILITIES IN CALIFORNIA ONLY
      - . FOUR MAILINGS PER FISCAL YEAR





## HISPANIC CO-OP COUPONING PROGRAMS (CONT'D)

### - CELEBRANDO

- . PUBLISHED IN SPANISH BY ADVO
- . COUPONS ARE PUBLISHED/DISTRIBUTED BY ADVO AS PART OF A MAGAZINE FOCUSING ON GENERAL/ENTERTAINMENT EDITORIAL, WHICH IS MAILED TO HISPANIC CONSUMERS IN SELECTED MARKETS
- . PROGRAM ALSO INCLUDES RADIO AND IN-STORE SUPPORT
- . 348M CIRCULATION
  - CURRENTLY AVAILABLE IN TEN MARKET, WITH PLANS OF EXPANDING INTO SIX OTHER MARKETS
- . THREE MAILINGS A YEAR

### - HOGARAMA

- . BILINGUAL BOOKLET PUBLISHED BY JSA PUBLISHING
- . FORMATTED AS A GUIDE TO AMERICAN PRODUCTS, ALSO INCLUDES RECIPES, NUTRITIONAL INFO, ETC...
- . DISTRIBUTED VIA DOOR-TO-DOOR TO AREAS OF 20%+ HISPANIC DENSITY AND SUPPORTED BY A 2-WEEK RADIO CAMPAIGN
- . 1MM CIRCULATION NATIONALLY IN JUNE
  - BIMONTHLY



## HISPANIC LISTS

- A MULTITUDE OF LISTS ARE AVAILABLE TO ADVERTISERS INTERESTED IN PURSUING A DIRECT EFFORT TARGETING HISPANIC CONSUMERS
- . TOP SUPPLIERS INCLUDE DATABASE MANAGEMENT, NCRI LIST MANAGEMENT AND AMERICAN HISPANIC/PERFORMANCE DATA SYSTEM
- . LISTS CAN ALSO BE PURCHASED FROM SELECTED HISPANIC PUBLICATIONS (I.E., HISPANIC BUSINESS)



FESTIVALS/COMMUNITY EVENTS ALSO PROVIDE UNIQUE OPPORTUNITY FOR  
MARKETERS TO STRENGTHEN THEIR EQUITY IN THIS MARKET

- BROAD APPEAL, FAMILY EVENTS AVAILABLE IN MOST MAJOR  
MARKETS
  - . OPPORTUNITY TO SPONSOR BOOTH/STAGES, AND PASS OUT  
SAMPLES OR PREMIUMS
    - CALLE OCHO IN MIAMI
    - FIESTA BROADWAY IN LOS ANGELES



TOBACCO CATEGORY COMPETITIVE OVERVIEW

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### TOBACCO CATEGORY COMPETITIVE OVERVIEW

- TOTAL HISPANIC MEDIA SPENDING (EXCLUDING NEWSPAPERS) FOR THE TOBACCO INDUSTRY AMOUNTED TO 6.4MM IN 1992
  - . HISPANIC SPENDING DECREASED -42% VS. 1991
- PM ASSUMED LEADERSHIP OVER RJR IN 1992 BY SPENDING 68% OF TOTAL TOBACCO DOLLARS
  - INCREASED HISPANIC SPENDING BY +17% IN 1992 VS. 1991
    - . INCREASE DRIVEN BY INTRODUCTION OF BENSON & HEDGES KING
  - RJR WAS SECOND WITH A 30% SHARE OF SPENDING
    - . DECREASED SPENDING BY -65% IN 1992 VS. 1991
  - LORILLARD AND AMERICAN ACCOUNTED FOR ONLY 2% OF SPENDING
    - . LORILLARD ALSO CONSIDERABLY DECREASED ITS SPENDING BY -96%, WHILE AMERICAN'S MINIMAL SPENDING REMAINED FLAT
- BENSON & HEDGES SPENT THE MOST MEDIA DOLLARS FOLLOWED BY MARLBORO
  - . BENSON & HEDGES INCREASED ITS HISPANIC SPENDING BY +373%, WHILE MARLBORO DECREASED SPENDING BY -43% IN 1992 VS. 1991
  - . CAMEL AND WINSTON ALSO DECREASED SPENDING BY -77% AND -57%, RESPECTIVELY
    - SPENT HEAVILY AGAINST OUT-OF-HOME MEDIA, ALLOWING PHILIP MORRIS TO DOMINATE MAGAZINE ARENA
- SIMILAR TO 1991, THE BULK OF HISPANIC INDUSTRY DOLLARS (73%) WAS SPENT ON HISPANIC OUTDOOR, FOLLOWED BY MAGAZINES (18%), AND SUPPLEMENTS (9%)



HISPANIC MEDIA SPENDING IN THE TOBACCO INDUSTRY (000)

	1992				TOTAL	SHARE
	OUTDOOR	MAGAZINES	SUPPLEMENTS			
<b>PHILIP MORRIS</b>	<b>\$2,958.7</b>	<b>\$990.7</b>	<b>\$373.7</b>	<b>\$4,323.1</b>	<b>68%</b>	
MARLBORO	\$998.1	\$439.7	\$167.4	\$1,605.2	25%	
VIRGINIA SLIMS	\$592.8	\$273.1	\$73.5	\$939.4	15%	
BENSON & HEDGES	\$1,330.5	\$277.9	\$132.8	\$1,741.2	27%	
MERIT ULTIMA	\$37.3	\$0.0	\$0.0	\$37.3	1%	
<b>RJR</b>	<b>\$1,643.7</b>	<b>\$70.8</b>	<b>\$194.4</b>	<b>\$1,908.9</b>	<b>30%</b>	
CAMEL	\$723.4	\$25.0	\$3.6	\$752.0	12%	
WINSTON	\$534.7	\$45.8	\$96.6	\$677.1	11%	
SALEM	\$385.6	\$0.0	\$94.2	\$479.8	8%	
MAGNA	\$0.0	\$0.0	\$0.0	\$0.0	0%	
DAKOTA	\$0.0	\$0.0	\$0.0	\$0.0	0%	
<b>LORILLARD</b>	<b>\$57.2</b>	<b>\$10.4</b>	<b>\$0.0</b>	<b>\$67.6</b>	<b>1%</b>	
NEWPORT	\$57.2	\$0.0	\$0.0	\$57.2	1%	
KENT	\$0.0	\$10.4	\$0.0	\$10.4	0%	
<b>B&amp;W</b>	<b>\$5.3</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$5.3</b>	<b>0%</b>	
KOOL	\$0.0	\$0.0	\$0.0	\$0.0	0%	
CAPRI	\$0.0	\$0.0	\$0.0	\$0.0	0%	
RICHLAND	\$0.0	\$0.0	\$0.0	\$0.0	0%	
SAVANNAH LIGHTS	\$5.3	\$0.0	\$0.0	\$5.3	0%	
VICEROY	\$0.0	\$0.0	\$0.0	\$0.0	0%	
<b>AMERICAN</b>	<b>\$0.0</b>	<b>\$50.1</b>	<b>\$0.0</b>	<b>\$50.1</b>	<b>1%</b>	
MISTY	\$0.0	\$42.1	\$0.0	\$42.1	1%	
BULL DURHAM	\$0.0	\$8.0	\$0.0	\$8.0	0%	
MALIBU	\$0.0	\$0.0	\$0.0	\$0.0	0%	
<b>TOTAL</b>	<b>\$4,664.9</b>	<b>\$1,122.0</b>	<b>\$568.1</b>	<b>\$6,355.0</b>	<b>100%</b>	
<b>SHARE</b>	<b>73%</b>	<b>18%</b>	<b>9%</b>	<b>100%</b>		

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\*PLEASE NOTE: TOBACCO SPENDING FOR NEWSPAPERS IN 1992 IS NOT AVAILABLE

HISPANIC MEDIA SPENDING IN THE TOBACCO INDUSTRY (000)

	1991				
	OUTDOOR	MAGAZINES	NEWSPAPERS	SUPPLEMENTS	TOTAL SHARE
<b>PHILIP MORRIS</b>	<b>\$2,807.3</b>	<b>\$646.0</b>	<b>\$668.9</b>	<b>\$259.0</b>	<b>\$4,381.2 36%</b>
MARLBORO	\$2,403.6	\$384.2	\$668.9	\$52.2	\$3,508.9 29%
VIRGINIA SLIMS	\$219.3	\$158.4	\$0.0	\$126.8	\$504.5 4%
BENSON & HEDGES	\$184.4	\$103.4	\$0.0	\$80.0	\$367.8 3%
MERIT ULTIMA	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
<b>RJR</b>	<b>\$5,049.0</b>	<b>\$258.9</b>	<b>\$244.0</b>	<b>\$208.5</b>	<b>\$5,760.4 48%</b>
CAMEL	\$3,267.1	\$4.6	\$207.4	\$0.0	\$3,479.1 29%
WINSTON	\$1,171.6	\$208.1	\$32.2	\$208.5	\$1,620.4 13%
SALEM	\$527.0	\$46.2	\$4.4	\$0.0	\$577.6 5%
MAGNA	\$58.3	\$0.0	\$0.0	\$0.0	\$58.3 0%
DAKOTA	\$25.0	\$0.0	\$0.0	\$0.0	\$25.0 0%
<b>LORILLARD</b>	<b>\$1,393.9</b>	<b>\$273.6</b>	<b>\$42.7</b>	<b>\$16.1</b>	<b>\$1,726.3 14%</b>
NEWPORT	\$1,069.2	\$90.5	\$0.0	\$0.0	\$1,159.7 10%
KENT	\$324.7	\$183.1	\$42.7	\$16.1	\$566.6 5%
<b>B&amp;W</b>	<b>\$54.8</b>	<b>\$0.0</b>	<b>\$33.9</b>	<b>\$0.0</b>	<b>\$88.7 1%</b>
KOOL	\$36.6	\$0.0	\$33.9	\$0.0	\$70.5 1%
CAPRI	\$13.7	\$0.0	\$0.0	\$0.0	\$13.7 0%
RICHLAND	\$4.5	\$0.0	\$0.0	\$0.0	\$4.5 0%
SAVANNAH LIGHTS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
VICEROY	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
<b>AMERICAN</b>	<b>\$9.6</b>	<b>\$42.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$51.6 0%</b>
MISTY	\$9.6	\$16.5	\$0.0	\$0.0	\$26.1 0%
BULL DURHAM	\$0.0	\$25.5	\$0.0	\$0.0	\$25.5 0%
MALIBU	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
<b>TOTAL</b>	<b>\$9,314.6</b>	<b>\$1,220.5</b>	<b>\$989.5</b>	<b>\$483.6</b>	<b>\$12,008.2 100%</b>
<b>SHARE</b>	<b>78%</b>	<b>10%</b>	<b>8%</b>	<b>4%</b>	<b>100%</b>

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HISPANIC MEDIA SPENDING IN THE TOBACCO INDUSTRY (000)

	1990				
	OUTDOOR	MAGAZINES	NEWSPAPERS	SUPPLEMENTS	TOTAL SHARE
<b>PHILIP MORRIS</b>	<b>\$2,628.4</b>	<b>\$501.4</b>	<b>\$1,232.1</b>	<b>\$312.4</b>	<b>\$4,674.3 39%</b>
MARLBORO	\$2,169.7	\$359.5	\$797.6	\$156.7	\$3,483.5 29%
VIRGINIA SLIMS	\$256.4	\$132.9	\$0.0	\$31.8	\$421.1 4%
BENSON & HEDGES	\$202.3	\$9.0	\$434.5	\$123.9	\$769.7 6%
MERIT ULTIMA	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
<b>RJR</b>	<b>\$3,489.1</b>	<b>\$513.1</b>	<b>\$332.0</b>	<b>\$715.8</b>	<b>\$5,050.0 42%</b>
CAMEL	\$2,134.5	\$56.6	\$255.2	\$244.5	\$2,690.8 23%
WINSTON	\$717.3	\$382.7	\$38.1	\$463.4	\$1,601.5 13%
SALEM	\$637.3	\$73.8	\$38.7	\$7.9	\$757.7 6%
MAGNA	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
DAKOTA	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
<b>LORILLARD</b>	<b>\$1,505.9</b>	<b>\$301.8</b>	<b>\$5.5</b>	<b>\$237.6</b>	<b>\$2,050.8 17%</b>
NEWPORT	\$1,045.2	\$64.0	\$0.0	\$0.0	\$1,109.2 9%
KENT	\$460.7	\$237.8	\$5.5	\$237.6	\$941.6 8%
<b>B&amp;W</b>	<b>\$31.9</b>	<b>\$64.4</b>	<b>\$16.2</b>	<b>\$0.0</b>	<b>\$112.5 1%</b>
KOOL	\$0.0	\$31.9	\$4.5	\$0.0	\$36.4 0%
CAPRI	\$0.0	\$0.0	\$9.0	\$0.0	\$9.0 0%
RICHLAND	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
SAVANNAH LIGHTS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
VICEROY	\$31.9	\$32.5	\$2.7	\$0.0	\$67.1 1%
<b>AMERICAN</b>	<b>\$0.0</b>	<b>\$50.2</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$50.2 0%</b>
MISTY	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
BULL DURHAM	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0 0%
MALIBU	\$0.0	\$50.2	\$0.0	\$0.0	\$50.2 0%
<b>TOTAL</b>	<b>\$7,655.3</b>	<b>\$1,430.9</b>	<b>\$1,585.8</b>	<b>\$1,265.8</b>	<b>\$11,937.8 100%</b>
<b>SHARE</b>	<b>64%</b>	<b>12%</b>	<b>13%</b>	<b>11%</b>	<b>100%</b>

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