A STUDY

OF

ETHNIC MARKETS

PEG

PREFACE

Since 1965, R. J. Reynolds has spent $5,260,000 tailoring advertising to the Negro, Spanish-Language, and Jewish special markets. The consumers in these markets have grown steadily in numbers, and, collectively, now comprise a potent force of about 38,000,000 potential customers. Together they represent 19% of the total U. S. population.

Today's competitive pressures demand that firms become more sophisticated in marketing strategy development and execution. Marketers are required to gain broader and deeper knowledge of each distinctive market segment. Advertisers must become increasingly more skillful not only to reach efficiently but also to influence effectively.

This document is structured to allow marketing professionals to determine for themselves whether or not they want to direct part of their marketing effort to the Negro, Spanish-Speaking or Jewish consumers.

If a decision is reached to establish a franchise in these special markets, this document contains the information necessary to develop the required marketing strategy.

Quantitatively, this presentation is not intended to represent the actual situation. The accuracy of available standardized data on these groups is hampered by the shortcomings of both research availibility and measurement methodology, as well as by obsolescence. However, the figures are the most accurate available. They were gleaned from the best sources available, cross checked, and, in my opinion, can be used to make sound decisions concerning advertising expenditures. Qualitatively, it represents the conclusions of the leading experts in the field including those of William Esty, D. Parke Gibson and Associates, The Joseph Jacobs Organization, and the WINSTON Brand Group.

Finally, since no document with the breadth and depth of this one has ever been compiled for R. J. Reynolds concerning these market segments, this is not a final statement; rather, it is only a beginning.

Gehrmann Holland
September, 1969

NEGRO MARKET

50198 9233

R. J. Reynolds

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R. J. Reynolds

NEGRO MARKET STUDY

I. Profile of the Negro Market

A. Population

The pre-census forecast shows the U. S. Negro population totals over 22 million. Since they constitute 11.2% of the total population, up from 10.9% in 1960, they continue to be a minority group. However, the Negro population is increasing at a faster rate than the white's. The white population is estimated to have grown 12.6% since 1960, the Negro population by 21.1% during the same period. Birth rates have been declining for both the white and Negro races since 1957. However, while the birth rate was 16.7 babies per thousand population for whites in 1967, it was 25.4 for Negroes. Among Negroes, females out-number males 11.6 million to 10.7 million.

Looking into the future, the Census Bureau says that there will be about 28 million Negro-Americans by 1980 and more than 35 million by 1990. They will account for 12.4% of the total population in 1980 and 13.6% by 1990. The Negro labor force is expected to increase by almost four million from 1965 to 1980, while the total labor force will be adding 23 million. These statistics, as well as other factors, indicate that Negroes are destined to have

an increasingly larger role in American life in the future.

Although they represent only 11.2% of this country's total population, Negroes make their presence felt because, of the more than 22 million, 90% are concentrated in 78 cities. In these markets, they constitute 25% of the population. Approximately one-half are concentrated in the top 30 U. S. Negro markets. More dramatic is the fact that while 31% live in the top ten Negro MetroMarkets, only 23% of the total population is contained in these same markets. About one-fourth of the nation's Negroes reside in New York, Chicago, Detroit, Philadelphia and Los Angeles.

The first Census in 1790 counted nearly 700,000 black people, about 1 in every 5 Americans. In 1860 they were about 1 in 7. When America stopped importing slaves, birth became the only basis of population growth. Africans did not voluntarily rush to America as the white European immigrants did, so the white population grew much faster than the black, forcing the earlier high percentage to decline.

In the days of slavery, and for many years afterward, most Negroes lived on farms. At the turn of the century 80% of them still were in the rural areas, but then farming changed. Machines began to replace people on the

farms and they had to move to new places and to new kinds of work. In 1940 only about a third of the Negroes lived on farms but in 1960 the proportion went down to 8%. Now it is about 7%, slightly higher than the percentage for the white population.

Most of them clustered in the central cities of our largest metropolitan areas. From 1950 to 1968 the total Negro population increased by 7 million, and 5 million of the increase was in the central cities of our metropolitan areas. More than half (54%) now live in central cities. So, starting out as farm people they have now become urban residents.

The white people who were farmers also moved from the farms to the cities, but then went on to the suburbs. Considering only the metropolitan areas, most of the Negroes are in the central cities and most of the whites are in the suburbs. From 1960 to 1966, Negro metro population increased by 21%, almost all of it occurred within central cities. By contrast, metro white population increased 9% and all of it occurred outside central cities and in the suburbs. The most recent figures indicate a continued increase in the number of Negroes in the central cities and a slight increase in their suburban population since 1960.

As they moved from the farm to the city, they also moved from the South to the North and West. In 1860 the population was 4.5 million including 4 million slaves. At that time 92% of all American Negroes lived in the South.* In 1900, 90% were still there, but then they began to spread out. By 1960, this figure was down to 60% and the 1968 estimate is 53%. The South lost a Negro population of 4 million between 1940 and 1966.

B. Income/Employment

It is estimated that the 1970 American Negro's annual purchasing power will be $32 billion. This ranks tenth highest among all nations of the world. Yet as a group, Negroes are in poverty. Even though Negro families have increased their average annual earnings 60% since 1950, they continue to earn less money than the average white family, although the average Negro family tends to be larger. Nine percent (9%) of all U. S. families are Negro but they receive only about 6% of the aggregate national income. Their pay is lowest in the South and highest in the West and Midwest. Between 1960 and 1966,

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*The Census Bureau counts Maryland, Delaware, Kentucky, Oklahoma, West Virginia, and the District of Columbia as "South", along with the states of the Old Confederacy.

the median annual income of non-white** families as measured in constant 1966 dollars by Fortune, increased by roughly 33%, to about $4,600. The median figure for white families during this period rose by 20%, to about $7,700. Negro income as a proportion of white income advanced from 55% to almost 60%. The 1969 median income for Negroes is estimated to be $4,939 and for all families, $8,017. At the same time, the proportion of Negro families below the poverty line has declined significantly. In 1959, half the country's non-white families lived below the federal government's line ($3,300 for a non-farm family of four, with two children). By 1966 the rate was down to 35%. Meanwhile, in 1950, only 1.6% of the Negro families had annual incomes of $10,000 or more but by 1966 this figure drastically jumped to 12.2%.

One reason their incomes have traditionally been low is that Negro families are three times more likely to be headed by a woman, a lower wage earner than men, as are white families. In addition, the earning power of the black worker often is lower than that of the white even

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**Bureau of Census figures, used by Fortune, refer to non-white rather than to Negro. The non-white category included Indians, Orientals and others. However, since Negroes make up 92% of this category, "non-white" data is indicative of their situation. It is not felt that, statistically, the remaining 8% of the non-white population would drastically change the actual Negro situation.

when they have both had the same amount of schooling. Another reason for the low income level is that so many Negroes have low-paying jobs. About two out of five Negro men and more than half of all Negro women who work are service workers, laborers, or farm workers. But the trend is away from the low-paying jobs. A comparison of 1960 and 1967 employment figures shows that 169,000 fewer Negroes worked in household service, 70,000 fewer were laborers, and 453,000 fewer worked on farms in 1967. At the same time the number of Negro professional, technical, and crafts workers increased by about 1.4 million.

However, Negro representation in the professions and in some skilled areas remains proportionately small. Negro men represent 10% of the employed males in this country, but only 2% of the doctors, 2.5% of the dentists, 1.5% of the electricians, and 0.5% of the engineers. Negro women represent 13% of the employed women but only 2.4% of the lawyers, 5.6% of the professional nurses, 6.5% of the medical technicians, 2.4% of the telephone operators, 1.5% of the secretaries, and 8.8% of the elementary school teachers.

On the other hand, they do have their full share of some jobs, including clergymen, social workers, cosmetologists, and dieticians. They have a higher share of mail carriers, masons, metal workers, plasterers, service station attendants,

furnace men, laundry workers, packers, taxi drivers, elevator operators, and practical nurses than do white people.

While Negro professionals historically have concentrated in fields serving their race (medicine, law, ministry) they have begun to move into the "mainstream". Between 1950 and 1961 the number of Negro architects increased by 77%, and engineers by 200% and this trend has continued through the 1960's.

There is some black ownership of almost every conceivable kind of enterprise, from hotels and radio stations to banks, insurance companies, management consulting firms, and supermarkets. Of those Negroes who are self-employed, 178,000 have farms, 1,200 have clothing stores, 400 own furniture stores, 300 own household appliance stores, 2,600 have gasoline and service stations, over 8,000 have trucking services, 4,000 are in wholesale trade, 13,000 have food and dairy stores, 15,000 have eating and drinking places, and 1,700 have miscellaneous retail stores.

Even though these employment statistics are more encouraging now than in earlier years, they are deceiving because unemployment is still a major problem for Negro Americans. An estimated 638,000 Negroes were unemployed in 1967. This included more than 101,000 married men. Compared

with white workers, they are twice as likely to be out of work. Their total unemployment declined slightly from 7.4 in 1967 to 6.8 for the first six months of 1968. In ghetto areas, one available Negro worker out of every three is either unemployed or seriously underemployed (working for substandard pay or working only part-time). Nationally, 14% of the Negroes and 3% of the whites are on welfare.

C. Education

The trend for higher education is definitely up. Each year there are fewer dropouts and more high school graduates and college students. In 1958, two-thirds were high school dropouts while in 1968 more than half were completing the twelfth grade. Girls typically completed more years of schooling than boys. However, from 1960 to 1966, this pattern reversed. Today, the median number of years of school completed by non-white males between the ages of 25 and 29 is 12.1, compared with 11.9 for females. Only 77% of the young Negro men and women aged 16 and 17 were enrolled in school in 1960. In 1966 that figure rose to 83%. The proportion of young adults who have completed high school continues to rise for both races, although there is still a gap between black and white. However, non-white males are continuing to narrow the education gap. The difference in median years of schooling completed is down from nearly two years in 1960

to only a half-year today.

State, Standard Metropolitan Statistical Areas (SMSA's), county and city estimates are developed exclusively by Market Data division of SRDS.

Leading 100 Metro Areas Ranked in Negro Populatio

RANK		
1.	New York	1,489,300
2.	Chicago	1,136,300
3.	Philadelphia	766,000
4.	Detroit	725,900
5.	Los Angeles-Long Beach	613,200
6.	Washington, D. C.	600,200
7.	Baltimore	461,000
8.	St. Louis	349,600
9.	Houston	347,000
10.	New Orleans	327,900
11.	Cleveland	304,500
12.	Newark, N. J.	295,300
13.	Atlanta	293,500
14.	San Francisco-Oakland	284,100
15.	Memphis	280,600
16.	Birmingham, Ala.	240,300
17.	Dallas	190,100
18.	Pittsburgh	185,300
19.	Miami	175,100
20.	Norfolk-Portsmouth, Va.	167,200
21.	Cincinnati	154,900
22.	Kansas City, Mo.	139,000
23.	Mobile	132,400
24.	Richmond, Va.	128,800
25.	Indianapolis	127,900
26.	Greensboro-Winston-Salem-High Point	123,000
27.	Jacksonville, Fla.	121,600
28.	Shreveport, La.	112,800
29.	Gary-Hammond-East Chicago, Ind.	111,900
30.	Charleston, S. C.	108,600
31.	Tampa-St. Petersburg	103,800
32.	Jackson, Miss.	102,200
33.	Buffalo	100,700
34.	Nashville, Tenn.	98,200
35.	Louisville	97,000
36.	Columbus, Ohio	94,400
37.	Boston (Official S.M.S.A.)	93,700
38.	Charlotte, N. C.	89,800
39.	Columbia, S. C.	85,500
40.	Baton Rouge	84,300
41.	Milwaukee	84,200
42.	Dayton, Ohio	83,100
43.	Montgomery, Ala.	78,500
43.	Savannah, Ga.	78,500
45.	Fort Lauderdale-Hollywood, Fla.	73,400
46.	Augusta, Ga.	72,700
47.	Beaumont-Port Arthur-Orange	72,600
48.	Columbus, Ga.	70,700
49.	Newport News-Hampton, Va.	70,500
50.	Fort Worth	69,800
51.	Macon	67,600
52.	San Antonio	64,300
52.	Wilmington, Del.	64,300
54.	West Palm Beach	63,600
55.	Orlando	61,800
56.	Denver	60,200
57.	San Diego	57,600
58.	Chattanooga	57,500
58.	Paterson-Clifton-Passaic	57,500
60.	Youngstown-Warren	55,600
61.	Little Rock-North Little Rock	54,900
62.	Jersey City	54,300
63.	Toledo	53,300
64.	Akron	51,800
65.	Durham	50,000
66.	Flint	48,800
66.	Raleigh	48,800
68.	Fayetteville	48,700
69.	Greenville, Miss.	46,900
70.	Greenville, S. C.	45,900
71.	Pensacola	45,100
72.	Oklahoma City	44,700
73.	Trenton	44,600
74.	San Bernardino-Riverside-Ontario	43,100
75.	Lakeland	40,800
76.	Alexandria, La.	39,000
77.	Hartford (Official S.M.S.A.)	38,800
78.	New Haven (Official S.M.S.A.)	38,700
79.	Monroe	38,300
80.	Atlantic City	37,400
81.	Spartanburg	36,700
82.	Lake Charles	36,300
82.	Pine Bluff	35,300
84.	Phoenix	35,900
85.	Tuscaloosa	35,500
86.	Seattle-Everett	35,200
87.	Danville, Va.	35,000
88.	Huntsville	34,700
88.	Petersburg, Va.	34,700
90.	Galveston-Texas City	34,500
90.	Rochester, N. Y.	34,500
92.	Tulsa	33,100
93.	Austin	31,400
94.	Sacramento	31,200
95.	Omaha	30,700
96.	Knoxville	30,500
97.	Albany, Ga.	30,300
98.	Tallahassee	27,600
98.	Waco	27,600
100.	Tyler	26,900
	Total 100 Leading Metro Areas	14,379,800

U. S. TOTAL NEGRO POPULATION 1-1-69 — 22,628,000

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State, Standard Metropolitan Statistical Areas (SMSAs), county and city estimates are developed exclusively by Market Data division of SRDS.

Negro Population Data

January 1, 1969

METHODS AND SOURCES:
Each year SRDS Consumer Market Data Division develops a special population projection of the Negro population for all the metro areas, and county data for several southern states. This tabulation was developed from material in the *Official 1960 Census of Population.*

ALABAMA

STATE TOTAL ... 1,048,500
METRO AREAS
Birmingham ... 240,300
Gadsden ... 16,400
Huntsville ... 34,700
Mobile ... 132,400
Montgomery ... 78,500
Tuscaloosa ... 35,500
Total Metros ... 537,800
COUNTIES
Baldwin ... 11,200
Barbour ... 12,800
Butler ... 10,900
Calhoun ... 20,400
Chambers ... 13,900
Clarke ... 12,700
Dallas ... 32,600
Elmore ... 10,300
Escambia ... 12,300
Etowah ... 16,400
Greene ... 10,900
Hale ... 13,600
Houston ... 14,000
Jefferson ... 228,700
Lee ... 18,400
Lowndes ... 12,400
Macon ... 22,200
Madison ... 26,900
Marengo ... 16,700
Mobile ... 121,200
Monroe ... 11,200
Montgomery ... 68,200
Perry ... 11,400
Pike ... 10,700
Russell ... 24,600
Sumter ... 15,200
Talladega ... 21,700
Tallapoosa ... 10,100
Tuscaloosa ... 35,500
Wilcox ... 14,300
Total Counties ... 851,600

ALASKA

STATE TOTAL ... 8,500
METRO AREAS
Anchorage ... 2,400
Total Metros ... 2,400

ARIZONA

STATE TOTAL ... 58,900
METRO AREAS
Phoenix ... 35,900
Tucson ... 11,300
Total Metros ... 47,200

ARKANSAS

STATE TOTAL ... 375,400
METRO AREAS
Fort Smith ... 7,300
Little Rock-North Little Rock ... 54,900
Pine Bluff ... 36,300
Texarkana ... 24,800
Total Metros ... 123,300
COUNTIES
Chicot ... 10,400
Crittenden ... 27,700
Jefferson ... 36,300
Lee ... 12,300
Mississippi ... 20,000
Ouachita ... 11,900
Phillips ... 24,500
Pulaski ... 52,900
St. Francis ... 18,600
Union ... 15,000
Total Counties ... 229,900

CALIFORNIA

STATE TOTAL ... 1,295,800
METRO AREAS
Anaheim-Santa Ana-Garden Grove ... [illegible]
Bakersfield ... 23,900
Fresno ... 25,100
Los Angeles-Long Beach ... 613,200
Modesto ... 1,400
Oxnard-Ventura ... 7,000
Sacramento ... 31,200
Salinas-Monterey ... 9,800
San Bernardino-Riverside-Ontario ... 43,100
San Diego ... 57,600
San Francisco-Oakland ... 284,100
San Jose ... 6,400
Santa Barbara ... 3,900
Santa Rosa ... 1,200
Stockton ... 16,900
Vallejo-Napa ... 22,500
Total Metros ... 1,152,400

COLORADO

STATE TOTAL ... 72,500
METRO AREAS
Colorado Springs ... 7,200
Denver ... 60,200
Pueblo ... 3,100
Total Metros ... 70,500

CONNECTICUT

STATE TOTAL ... 150,400
METRO AREAS
Bridgeport (S.M.S.A.) ... 23,500
Bridgeport-Stamford-Norwalk (County Basis) ... 45,500
Hartford (S.M.S.A.) ... 38,800
Hartford-New Britain-Bristol (County Basis) ... 43,600
Meriden (S.M.S.A.) ... 1,100
New Britain (S.M.S.A.) ... 3,800
New Haven (S.M.S.A.) ... 38,700
New Haven-Waterbury-Meriden (County Basis) ... 46,000
New London-Groton-Norwich (S.M.S.A.) ... 5,900
New London-Groton-Norwich (County Basis) ... 6,100
Norwalk (S.M.S.A.) ... 7,400
Stamford (S.M.S.A.) ... 11,900
Waterbury (S.M.S.A.) ... 9,700
Total Metros (S.M.S.A.) ... 140,600
Total Metros (County Basis) ... 141,200

DELAWARE

STATE TOTAL ... 75,800
METRO AREAS
Wilmington ... 64,300
Total Metros ... 64,300

DISTRICT OF COLUMBIA

DISTRICT TOTAL ... 535,200
METRO AREAS
[illegible]

FLORIDA

STATE TOTAL ... 1,137,000
METRO AREAS
Daytona Beach ... 23,600
Fort Lauderdale-Hollywood ... 73,400
Gainesville ... 26,200
Jacksonville ... 121,600
Lakeland ... 40,800
Miami ... 175,100
Orlando ... 61,000
Pensacola ... 45,100
Sarasota ... 9,600
Tallahassee ... 27,600
Tampa-St. Petersburg ... 103,800
West Palm Beach ... 63,600
Total Metros ... 772,600

GEORGIA

STATE TOTAL ... 1,312,800
METRO AREAS
Albany ... 30,300
Athens ... 14,200
Atlanta ... 293,500
Augusta ... 72,700
Columbus ... 70,700
Macon ... 67,600
Savannah ... 78,500
Total Metros ... 627,500
COUNTIES
Baldwin ... 9,800
Bibb ... 58,100
Burke ... 14,700
Chatham ... 78,500
Clarke ... 14,200
Coweta ... 11,100
Decatur ... 11,700
De Kalb ... 25,700
Dougherty ... 30,300
Fulton ... 245,700
Glynn ... 13,700
Laurens ... 12,900
Lowndes ... 17,900
Mitchell ... 11,100
Muscogee ... 44,500
Richmond ... 43,400
Sumter ... 14,100
Thomas ... 16,500
Troup ... 17,900
Washington ... 12,000
Total Counties ... 708,800

HAWAII

STATE TOTAL ... 7,100
METRO AREAS
Honolulu ... 7,000
Total Metros ... 7,000

IDAHO

STATE TOTAL ... 1,800
METRO AREAS
Boise City ... 500
Pocatello ... 600
Total Metros ... 1,100

ILLINOIS

STATE TOTAL ... 1,345,900
METRO AREAS
Bloomington-Normal ... 1,300
Champaign-Urbana ... 8,700
Chicago ... 1,136,300
Chicago, Ill.-Northwestern, Ind. (Consolidated) ... 1,248,200
Danville ... 6,400
Davenport-Rock Island-Moline ... 7,500
Decatur ... 7,500
Peoria ... 13,200
Quincy ... 1,700
Rockford ... 11,100
Springfield ... 7,000
Total Metros ... 1,200,700

INDIANA

STATE TOTAL ... 344,200
METRO AREAS
Anderson ... 6,[illegible]
Elkhart ... 3,[illegible]
Fort Wayne ... 14,300
Gary-Hammond-East Chicago ... 111,900
Indianapolis ... 127,900
Kokomo ... 3,100
Lafayette-West Lafayette ... 1,000
Marion ... 4,000
Muncie ... 7,200
Richmond ... 4,400
South Bend ... 17,300
Terre Haute ... 6,200
Total Metros ... 323,600

IOWA

STATE TOTAL ... 28,100
METRO AREAS
Cedar Rapids ... 1,200
Davenport-Rock Island-Moline ... 7,500
Des Moines ... 11,300
Dubuque ... 100
Sioux City ... 1,600
Waterloo ... 5,600
Total Metros ... 27,300

KANSAS

STATE TOTAL ... 109,700
METRO AREAS
Salina ... 1,900
Topeka ... 11,200
Wichita ... 23,700
Total Metros ... 36,800

KENTUCKY

STATE TOTAL ... 243,000
METRO AREAS
Huntington-Ashland ... 7,600
Lexington ... 25,000
Louisville ... 97,000
Owensboro ... 3,300
Total Metros ... 132,900

LOUISIANA

STATE TOTAL ... 1,246,100
METRO AREAS
Alexandria ... 39,000
Baton Rouge ... 84,300
Lafayette ... 25,000
Lake Charles ... 36,300
Monroe ... 38,300
New Orleans ... 327,500
Shreveport ... 112,800
Total Metros ... 653,600
PARISHES
Avoyelles ... 12,500
Bossier ... 16,900
Caddo ... 95,900
Calcasieu ... 36,300
De Soto ... 15,900
East Baton Rouge ... 84,300
East Feliciana ... 12,700
Franklin ... 12,800
Iberia ... 17,500
Iberville ... 16,800
Jefferson ... 39,100
Lafayette ... 25,000
Lincoln ... 13,700
Madison ... 12,500
Morehouse ... 18,500
Natchitoches ... 17,900
Orleans ... 273,400
Ouachita ... 38,300
Pointe Coupee ... 14,000
Rapides ... 39,000
Richland ... 12,700
St. Landry ... 41,200
St. Martin ... 12,900
St. Mary ... 17,700
St. Tammany ... 12,400
Tangipahoa ... 24,100
Terrebonne ... 15,300
Washington ... 17,500
Webster ... 15,900
Total Parishes ... 983,100

MAINE

STATE TOTAL ... 4,700
METRO AREAS
Bangor (County Basis) ... 1,100
Lewiston-[illegible] (S.M.S.A.) ... 300
Portland (S.M.S.A.) ... 600
Portland (County Basis) ... 900
Total Metros (S.M.S.A.) ... 700
Total Metros (County Basis) ... 2,100

MARYLAND

STATE TOTAL ... 655,300
METRO AREAS
Baltimore ... 461,000
Total Metros ... 461,000

MASSACHUSETTS

STATE TOTAL ... 145,200
METRO AREAS
Boston (S.M.S.A.) ... 93,700
Boston-Lawrence-Haverhill-Lowell (County Basis) ... 98,300
Brockton (S.M.S.A.) ... 2,300
Brockton (County Basis) ... 56,900
Fall River (S.M.S.A.) ... 500
Fitchburg-Leominster (S.M.S.A.) ... 1,200
Lawrence-Haverhill (S.M.S.A.) ... 800
Lowell (S.M.S.A.) ... 700
New Bedford (S.M.S.A.) ... 5,000
New Bedford-Fall River (County Basis) ... 5,700
Pittsfield (S.M.S.A.) ... 1,100
Pittsfield (County Basis) ... 1,700
Springfield-Chicopee-Holyoke (S.M.S.A.) ... 19,100
Springfield-Chicopee-Holyoke (County Basis) ... 19,500
Worcester (S.M.S.A.) ... 2,900
Worcester (County Basis) ... 4,200
Total Metros (S.M.S.A.) ... 127,300
Total Metros (County Basis) ... 186,300

MICHIGAN

STATE TOTAL ... 933,300
METRO AREAS
Ann Arbor ... 15,500
Battle Creek ... 13,100
Bay City ... 1,000
Detroit ... 725,900
Flint ... 48,800
Grand Rapids ... 19,600
Jackson ... 9,300
Kalamazoo ... 7,600
Lansing ... 9,800
Muskegon-Muskegon Heights ... 16,000
Saginaw ... 23,800
Total Metros ... 890,400

MINNESOTA

STATE TOTAL ... 32,100
METRO AREAS
Duluth-Superior ... 800
Fargo-Moorhead ...
Minneapolis-St. Paul ... 25,800
Rochester ... 100
St. Cloud ...
Total Metros ... 26,700

MISSISSIPPI

STATE TOTAL ... 976,900
METRO AREAS
[illegible] ... 22,800
Jackson ...
Meridian ...
Total Metros ...
COUNTIES
Adams ...
Bolivar ...
Coahoma ...
Copiah ...
De Soto ...
Forrest ...
Harrison ...
Hinds ...
Holmes ...
Humphreys ...
Jackson ...
Jones ...
Lauderdale ...
Lee ...
Le Flore ...
Lowndes ...
Madison ...
Marshall ...
Monroe ...
Noxubee ...
Oktibbeha ...
Panola ...
Pike ...
Quitman ...
Rankin ...
Sun Flower ...
Tallahatchie ...
Tate ...
Tunica ...
Warren ...
Washington ...
Yazoo ...
Total Counties ...

MISSOURI

STATE TOTAL ...
METRO AREA
Columbia ...
Joplin ...
Kansas City ...
St. Joseph ...
St. Louis ...
Springfield ...
Total Metros ...

MONTANA

STATE TOTAL ...
METRO AREA
Billings ...
Great Falls ...
Total Metros ...

NEBRASKA

STATE TOTAL ...
METRO AREA
Lincoln ...
Omaha ...
Total Metros ...

NEVADA

STATE TOTAL ...
METRO AREA
Las Vegas ...
Reno ...
Total Metros ...

NEW HAMP

STATE TOTAL ...
METRO AREA
Manchester (S.M.S.A.) ...
Manchester (County Basis) ...
Total Metros (S.M.S.A.) ...
Total Metros (County Basis) ...

NEW JERSE

STATE TOTAL ...
METRO AREA
Atlantic City ...
Jersey City ...
Newark ...

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Negro Population Data—Continued

New Brunswick-Perth Amboy ... 23,000
Paterson-Clifton-Passaic ... 57,500
Trenton ... 44,600
Vineland-Millville-Bridgeton ... 16,000
Total Metros ... 528,100

NEW MEXICO

STATE TOTAL ... 23,400
METRO AREAS
Albuquerque ... 6,700
Roswell ... 2,800
Total Metros ... 9,500

NEW YORK

STATE TOTAL ... 1,792,700
METRO AREAS
Albany-Schenectady-Troy ... 20,600
Binghamton ... 2,000
Buffalo ... 100,700
Elmira ... 3,300
Jamestown ... 1,400
New York ... 1,459,300
New York-Northeastern, N. J. (Consolidated) ... 1,919,300
Poughkeepsie ... 13,200
Rochester ... 34,500
Syracuse ... 15,500
Utica-Rome ... 6,300
Total Metros ... 1,665,600

NORTH CAROLINA

STATE TOTAL ... 1,242,300
METRO AREAS
Asheville ... 14,200
Charlotte ... 89,800
Durham ... 50,000
Fayetteville ... 48,700
Gastonia ... 18,300
Greensboro-Winston-Salem-High Point ... 123,000
Raleigh ... 43,800
Wilmington ... 20,800
Total Metros ... 413,600
COUNTIES
Alamance ... 16,300
Anson ... 12,100
Beaufort ... 13,400
Bertie ... 14,300
Bladen ... 12,300
Buncombe ... 14,200
Caswell ... 11,800
Cleveland ... 15,700
Columbus ... 17,100
Craven ... 18,300
Cumberland ... 43,700
Duplin ... 15,100
Durham ... 38,700
Edgecombe ... 30,400
Forsyth ... 50,200
Franklin ... 12,800
Gaston ... 18,300
Granville ... 15,300
Guilford ... 64,100
Halifax ... 33,200
Harnett ... 14,100
Hertford ... 13,800
Iredell ... 12,400
Johnston ... 13,700
Lenoir ... 23,700
Martin ... 13,200
Mecklenburg ... 79,300
Nash ... 24,800
New Hanover ... 20,700
Northampton ... 17,000
Onslow ... 14,200
Orange ... 11,300
Pasquotank ... 11,100
Pitt ... 32,300
Richmond ... 12,200
Robeson ... 28,500
Rockingham ... 15,500
Rowan ... 15,100
Sampson ... 18,000
Scotland ... 10,400
Vance ... 14,100
Wake ... 49,000
Warren ... 11,600
Wayne ... 33,600
Wilson ... 24,700
Total Counties ... 1,607,000

NORTH DAKOTA

STATE TOTAL ... 1,300
METRO AREAS
Fargo-Moorhead ... ----
Total Metros ... ----

OHIO

STATE TOTAL ... 938,900
METRO AREAS
Akron ... 51,800
Canton ... 22,700
Cincinnati ... 154,500
Cleveland ... 304,500
Columbus ... 94,400
Dayton ... 83,100
Hamilton-Middletown ... 11,500
Lima ... 8,600
Lorain-Elyria ... 15,200
Mansfield ... 8,400
Newark ... 1,500
Springfield ... 14,600
Steubenville-Weirton ... 8,600
Toledo ... 53,300
Youngstown-Warren ... 55,600

OKLAHOMA

STATE TOTAL ... 163,000
METRO AREAS
Lawton ... 8,300
Oklahoma City ... 44,700
Tulsa ... 33,100
Total Metros ... 86,100

OREGON

STATE TOTAL ... 23,100
METRO AREAS
Eugene ... 400
Portland ... 20,900
Salem ... 300
Total Metros ... 21,600

PENNSYLVANIA

STATE TOTAL ... 994,200
METRO AREAS
Allentown-Bethlehem-Easton ... 4,300
Altoona ... 1,200
Erie ... 8,100
Harrisburg ... 26,500
Johnstown ... 4,200
Lancaster ... 4,100
New Castle ... 3,300
Philadelphia ... 766,000
Pittsburgh ... 165,300
Reading ... 5,200
Scranton ... 1,000
Wilkes-Barre-Hazleton ... 3,500
Williamsport ... 1,300
York ... 6,600
Total Metros ... 1,018,400

RHODE ISLAND

STATE TOTAL ... 23,700
METRO AREAS
Providence-Pawtucket-Warwick (S.M.S.A.) ... 18,300
Providence-Pawtucket-Warwick (County Basis) ... 18,700
Total Metros (S.M.S.A.) ... 18,300
Total Metros (County Basis) ... 18,700

SOUTH CAROLINA

STATE TOTAL ... 879,100
METRO AREAS
Anderson ... 19,500
Charleston ... 103,600
Columbia ... 85,500
Greenville ... 45,900
Spartanburg ... 26,700
Total Metros ... 286,600
COUNTIES
Aiken ... 23,400
Anderson ... 19,500
Beaufort ... 19,200
Berkeley ... 20,400
Charleston ... 88,200
Chester ... 11,900
Chesterfield ... 12,200
Clarendon ... 19,200
Colleton ... 14,300
Darlington ... 24,500
Dillon ... 13,900
Dorchester ... 11,900
Fairfield ... 12,200
Florence ... 38,500
Georgetown ... 19,500
Greenville ... 41,000
Greenwood ... 14,000
Horry ... 20,200
Kershaw ... 12,800
Lancaster ... 10,900
Laurens ... 14,200
Lee ... 14,200
Lexington ... 11,600
Marion ... 17,600
Marlboro ... 13,000
Newberry ... 10,000
Orangeburg ... 41,900
Richland ... 73,900
Spartanburg ... 36,700
Sumter ... 38,300
Williamsburg ... 27,100
York ... 23,000
Total Counties ... 769,000

SOUTH DAKOTA

STATE TOTAL ... 1,300
METRO AREAS
Rapid City ... 700
Sioux Falls ... 200
Total Metros ... 900

TENNESSEE

STATE TOTAL ... 654,600
METRO AREAS
Bristol-Johnson City-Kingsport ... 7,700
Chattanooga ... 57,500
Knoxville ... 30,500
Memphis ... 260,600
Nashville ... 98,200
Total Metros ... 474,500

TEXAS

STATE TOTAL ... 1,378,500
METRO AREAS
Abilene ... 6,700
Amarillo ... 9,100
Austin ... 31,400
Beaumont-Port Arthur-Orange ... 72,600
Brownsville-Harlingen-San Benito ... 1,200
Corpus Christi ... 11,900
Dallas ... 190,100
El Paso ... 1,000
Fort Worth ... 69,800
Galveston-Texas C...
Houston ...
Laredo ...
Longview ...
Lubbock ...
McAllen-P...
Edinburg
Midland ...
Odessa ...
San Angelo
San Anton...
Sherman-Denison
Texarkana
Tyler ...
Waco ...
Wichita F...
Total Metr...

UTAH

STATE TOTA...
METRO
Ogden ...
Provo-Oren...
Salt Lake
Total Metr...

VERMON...

STATE TOTA...

VIRGINI...

STATE TOTA...
METRO
Bristol-Johnson...
Kingspor...
Charlottesv...
Danville ...
Lynchburg

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ranked

Total Metros (S.M.S.A.)	18,300
Total Metros (County Essex)	18,700

SOUTH CAROLINA

STATE TOTAL	679,100
METRO AREAS	
Anderson	19,900
Charleston	103,600
Columbia	85,500
Greenville	45,900
Spartanburg	36,700
Total Metros	295,600
COUNTIES	
Aiken	23,400
Anderson	19,900
Beaufort	19,200
Berkeley	20,400
Charleston	89,200
Chester	11,900
Chesterfield	12,200
Clarendon	19,200
Colleton	14,300
Darlington	24,500
Dillon	13,900
Dorchester	11,900
Fairfield	12,200
Florence	35,500
Georgetown	19,900
Greenville	41,000
Greenwood	14,000
Horry	20,200
Kershaw	12,800
Lancaster	10,900
Laurens	14,200
Lee	14,200
Lexington	11,600
Marion	17,600
Marlboro	13,000
Newberry	10,000
Orangeburg	41,900
Richland	73,900
Spartanburg	36,700
Sumter	28,500
Williamsburg	23,100
York	23,000
Total Counties	719,000

SOUTH DAKOTA

STATE TOTAL	1,300
METRO AREAS	
Rapid City	700
Sioux Falls	200
Total Metros	900

TENNESSEE

STATE TOTAL	1,554,800
METRO AREAS	
Bristol-Johnson City-Kingsport	7,700
Chattanooga	57,800
Knoxville	53,500
Memphis	235,400
Nashville	55,200
Total Metros	474,600

TEXAS

STATE TOTAL	1,372,500
METRO AREAS	
Abilene	6,700
Amarillo	9,100
Austin	31,400
Beaumont-Port Arthur-Orange	72,600
Brownsville-Harlingen-San Benito	1,200
Corpus Christi	11,900
Dallas	290,100
El Paso	1,000
Fort Worth	69,800
Galveston-Texas City	34,500
Houston	347,000
Laredo	300
Longview	17,600
Lubbock	14,300
McAllen-Pharr-Edinburgh	------
Midland	7,500
Odessa	5,800
San Angelo	3,700
San Antonio	64,500
Sherman-Denison	7,400
Texarkana	24,800
Tyler	26,900
Waco	27,600
Wichita Falls	10,100
Total Metros	985,600

UTAH

STATE TOTAL	5,100
METRO AREAS	
Ogden	2,100
Provo-Orem	------
Salt Lake City	2,500
Total Metros	4,600

VERMONT

STATE TOTAL	500

VIRGINIA

STATE TOTAL	920,000
METRO AREAS	
Bristol-Johnson City-Kingsport	7,700
Charlottesville	11,200
Danville	35,000
Lynchburg	26,200
Newport News-Hampton	70,500
Norfolk-Portsmouth	167,200
Petersburg	34,700
Richmond	128,800
Roanoke	22,800
Total Metros	504,100
COUNTIES	
Accomack	12,300
Albemarle	11,200
Arlington	21,200
Brunswick	11,300
Campbell	20,300
Chesapeake	21,800
Dinwiddie	34,700
Fairfax	16,200
Halifax	18,300
Hampton	21,700
Henrico	109,100
Henry	16,700
Mecklenburg	16,100
Nansemond	27,400
Newport News	43,700
Norfolk	86,200
Pittsylvania	35,000
Portsmouth	44,100
Roanoke	22,800
Southampton	16,900
Virginia Beach	15,100
Total Counties	622,100

WASHINGTON

STATE TOTAL	60,700
METRO AREAS	
Seattle-Everett	35,200
Spokane	3,800
Tacoma	13,000
Yakima	1,900
Total Metros	53,900

WEST VIRGINIA

STATE TOTAL	61,900
METRO AREAS	
Charleston	10,100
Huntington-Ashland	7,600
Parkersburg	400
Steubenville-Weirton	8,800
Wheeling	3,100
Total Metros	30,000
COUNTIES	
Kanawha	10,100
McDowell	10,700
Total Counties	20,800

WISCONSIN

STATE TOTAL	111,700
METRO AREAS	
Appleton	------
Duluth-Superior	600
Green Bay	200
Janesville	2,600
Kenosha	1,600
La Crosse	------
Madison	2,400
Milwaukee	84,200
Oshkosh	------
Racine	7,700
Sheboygan	------
Total Metros	99,500

WYOMING

STATE TOTAL	2,300
METRO AREAS	
Cheyenne	1,200
Total Metros	1,200

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R. J. REYNOLDS

NEGRO PURCHASING POWER HISTORY

America's almost 23-million Negro consumers live in 5.8 million households and currently spend more than $30-billion a year for consumer goods and services. The fact that the Negro market is a growing market is evidenced by the change in Negro purchasing power from 1940 to 1970:

1940	3 billion	
1950	11 "	
1961	20 "	
1965	27 "	
1966	30 "	
1970	32 "	(projected)

Source: U. S. Census

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MEDIA PLANNING

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NEGRO MARKET STUDY

II. Media Planning Implications

A. Negro Media Usage Rationale

Most research indicates that there is no quantitative rationale which demands the use of Negro-oriented media merely to reach the Negro consumer. However, most media basically reflect the interests, desires, and aspirations of their majority audience, which is largely middle-class white. Classification of these media as "white-oriented", would be far more accurate and functional than their most frequent classification as "general" media. To be effective, advertisers should use customer oriented media in which over 22,000,000 Negro-Americans, who look specifically at most situations as "Negroes", can truly identify with in the same manner as white consumers do with media oriented to them.

The consensus of opinion today is that if brand awareness is the primary advertising objective, then national advertising does generally reach this audience in proportion to their place in the total population. (This is especially true of brands that are so heavily advertised as WINSTON.) However, if the key objective is to sell more

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of Product A to more Negroes, then they must be communicated with, not merely reached. It is quite likely that there are brands which historically have utilized only general media but are Number One among Negroes. However, these brands, more likely than not, achieved this position in past years. In today's enviornment, it is doubtful whether brand leadership among Negroes can be attained, or held, without the use of Negro media and specialized advertising. Negroes feel that most ads placed in general media not only are not directed to their particular needs but also tend to use appeals with which they cannot identify. Therefore, Negroes do not "turn off" advertising in general media; rather, like all consumers, they respond best to advertising that appeals to their specific interests.

The point here is that the widespread assumption that "general" media reaches the Negro consumer anyway and that special campaigns aimed at Negroes are not necessary is a doubtful premise. Even to the extent that it is true, "reached" and "persuaded" are two entirely opposite marketing objectives. Negro media is not necessarily important for coverage. Its strength lies in the emotional influence it has on its audience. Negro media should be viewed by marketing strategists on the basis of "audience delivered" (this one numbers over 22 million)

rather than, as often is the case, a questionable adjunct of general media.

B. Media Analysis

Negro media provide a platform for specially tailored appeals to achieve maximum effectiveness in selling the Negro market. Negro non-broadcast media also provide almost 100% non-waste circulation by their isolation/penetration of Negro consumers only. Negro-oriented vehicles include: radio, television, newspapers, magazines, a Sunday supplement, special publications, and outdoor. Except for magazines, most of these vehicles are local in nature, serving the Negro population within particular markets. Negro consumers are served by four major consumer magazines, an estimated 172 Negro-oriented newspapers, about 537 radio stations, and one TV channel.

According to one study, during their leisure time, Negroes listen to the radio 39% of the time (the figure for whites is 15%); watch TV 28% of the time (44% for whites); read newspapers 26% of the time (37% for whites); and read magazines 7% of the time (4% for whites). These figures indicate that radio is potentially a more effective and efficient medium and television and newspapers less so among Negroes than among whites. One study indicates that middle-class Negroes react negatively to Negro radio programming but are avid readers of Negro magazines. On

the other hand, most consultants and advertisers agree that Negro programmed radio leads to the heart of the Negro mass. With a few notable exceptions, Negro newspapers generally are not highly regarded and from the reporting standpoint do not compete favorably with the white press. However, it is generally recognized that while Negro newspapers do not necessarily sell products, they do a very creditable job of merchandising the idea of a company's social involvement. Except in Washington, D.C., there is no Negro TV channel.

1. Radio

All of the Negro publications combined cannot come close to covering and influencing the Negro market as does radio. A recent project by the Opinion Research Corporation indicated that the average Negro listened to radio more than, and was interested in print media less than, the average white person. A Harvard Business Review study agreed and indicated that Negroes spend most of their media time with the radio.

In a survey made by the Center for Research in Marketing, it was found that Negroes could recall about twice as many commercials from radio as whites, particularly if heard on Negro-programmed stations. Proctor and Gamble, with heavy television

advertising, advanced Crest to become the Number One toothpaste brand in all markets except the Negro one. Colgate, which was Number One nationally also uses heavy television advertising. However, through its effectiveness in Negro radio, Colgate remains the Number One brand among Negroes although Crest is the national leader.

Negro-programmed stations play soul music or rhythm and blues. Rock and roll holds a few charms. Gospel music is for the older folks. But given rhythm and blues and a Negro disc jockey, the program is usually a success. Negro radio means Negro commercials and Negro disc jockeys. In addition to music, messages and programs directed at the predominately Negro audiences consist of daily hot lines or phone shows, Negro oriented news broadcasts, "Focus" interviews with black leaders, church bulletin boards, obituaries, job-opening directories, lost and found announcements and Negro variety shows. Radio has lost much of its appeal for much of the upper income group. But they comprise only 22% of all Negroes. For the younger Negroes, and therefore the masses, radio rates tops.

2. Television

No national Negro-oriented television vehicles exist. At this point, only one local television station is generally programming toward Negroes, WOOK-TV in Washington, D.C. Being a U.H.F. station, its potential is limited, of course, to U.H.F. penetration. There are, however, a number of black-oriented television shows, and more are being planned. Thus, within general television, there will be black-oriented programming.

3. Newspapers

The Commerce Department counts 172 active Negro newspapers, all but two are weeklies, with a reported circulation of nearly 2 million. Those newspapers with the largest circulation are concentrated in the top 25 Negro markets. The most highly regarded ones are the Amsterdam News, the Afro-American, and the Pittsburgh Courier. The two dailies are in Chicago and Atlanta. Some marketers sense that newspapers are beginning to compete favorable for the advertisers' money.

4. Magazines

References to Negro magazines really mean Ebony. Others include Jet, Tan, and Sepia. Ebony, this market's showcase medium, claims a subscriber

medium income of almost $7,046 ("middle-class"), compared with $4,939 for all Negro families. It is a Life - format monthly national magazine with a circulation of 1,200,000. It has a broad mass audience and is published in four regional editions: Eastern, Southern, Mid-Western, and Far-Western. Ebony has made an extensive effort to win advertisers, and within the last few years has taken great strides in this direction. The magazine maintains a staff of trained merchandising men to cover major cities--each with large Negro populations. These men act as local marketing experts and cultivate contacts for the jobbers, brokers, wholesalers, and chain and independent retailers. One marketer says that "Ebony is for the Negro who has it made".

Jet is a newsweekly magazine in digest form, which reports news of importance to Afro-Americans. Circulation is about 400,000. Tan is a monthly "confession/homemaking" magazine appealing to women. Its format is similar to that of True Story or True Confessions. These three magazines are all controlled by the Johnson Publishing Company. Sepia like Ebony is a Life format monthly magazine of good quality. It

also is a magazine of general interest to the Negro community, appealing to a broad mass audience. While national in scope, its circulation is small (57,000).

5. Sunday Supplement

The four-year old Negro supplement, Tuesday, is offered once a month as an Ethnic medium within the regular Sunday newspaper. It is inserted into 19 metropolitan newspapers which cover practically every section of the U. S. Tuesday has a circulation in excess of two million and advertising can be bought only on a national basis.

6. Outdoor/Transit

Outdoor advertising is considered an effective medium in the Negro community. It allows for showings keyed to concentrated Negro population centers tailored for desired markets. Generally, transit is not considered an effective Negro-oriented media as seldom do routes have confinement within Negro communities. However, like outdoor billboards, subway station billboards in Negro areas can be very effective.

7. Special Publications

There are numerous opportunities within the Negro market to take advantage of special issue

publications, usually one-time editions. Some newspapers such as the Afro-American newspapers schedule regular supplements (i.e., Holiday Hosting, Beauty, Travel, and other subjects) which offer some possibility for usage.

MEDIA DIRECTORY

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R. J. Reynolds

NEGRO MARKET STUDY

Media Directory Index

I. Media Directory Summary

II. Exhibit I - Negro Radio Markets
Exhibit II - Negro Newspapers in Major Negro Radio Markets
Exhibit III - Additional Negro Newspaper Markets
Exhibit II/III - Negro Newspapers, Summary of Group Buys
Exhibit IV - Negro Magazines
Exhibit V - Negro Outdoor

R. J. Reynolds

NEGRO MARKET STUDY

III. Media Directory

A review of the specialized media available for reaching the Negro market indicates that opportunities exist in all major media categories, with the exception of television. Aside from radio, the selection options within each media category are very limited.

1. Radio

Negro radio, of all media directed towards this segment of the population is undoubtedly the best, and most efficient means of reaching the Negro. This medium is universally available with several hundred stations throughout the country programming all or a portion of their broadcast day for the Negro. There is evidence that the effective coverage area of Negro radio stations is generally greater than comparable power general stations since the Negro radio listener tends to seek out Negro programmed stations. Local radio research although of questionable reliability, particularly in measuring Ethnic audiences, indicates that the Negro radio share of audience is generally in proportion to their share of Metro area population, i.e., the larger the percent of total market population represented by the Negro, the larger the share of audience attributed to Negro programmed stations. (See Exhibit I on Negro Radio Markets.)

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2. Television

Negro television, as such, is virtually non-existent. Although there are some stations which schedule occasional Negro discussion programs, for the most part, the only attempt that television broadcasters appear to have made to attract the black audience is through the use of Negro talent in regularly scheduled news, weather and sports features. Network scheduled shows starring Negroes (Julia) are aimed more at the mass audience than at solely Negroes.

3. Newspapers

Negro newspapers, with some few exceptions, are restricted primarily to small circulation weeklies. In most instances, their circulation is not audited, and they provide limited coverage of the Metro area Negro households. In major centers of Negro population, the dominant general appeal newspapers provide better physical coverage of the market than do the Negro newspapers. Negro newspaper details are shown on two lists -- a list of Negro newspapers available in major Negro radio markets and a list of Negro newspapers available in other markets. (Exhibits II and III)

4. Magazines

Of the seven national magazines (including one newspaper supplement editorially aimed at the Negro, the dominant vehicle is Ebony, with over one million circulation, and substantial pass along readership. (See Negro Exhibit IV.)

5. Outdoor

Outdoor advertising represents another effective means of delivering reminder impressions to the Negro market. This medium in the form of three sheet (Criterion) and six sheet (Junior) posters can be purchased so that showings are confined to locations in areas of heavy Negro population concentrations, and is generally available in most of the larger markets. (Exhibit V)

R. J. REYNOLDS TOBACCO COMPANY

MAJOR NEGRO RADIO MARKETS

Market	Metro Negro Pop. (000)	Negro % Of Tot. Pop.	Mkt. Rank Tot. U.S. (Negro)	Station	Power	Freq.	Negro Pop. 0.5MV Cov. (000)	Mkt. Rank Based On 0.5MV Cov.	On Air	Audience Survey Rd Share Source	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Atlanta, Ga.	235.0	22.6	14	WERD	1,000	860	285.0	20	Day	Pulse	18	16	20
				WAOK	5,000	1380			24 hrs.	Jan.-March	36	46	34
				WIGO	1,000D-250N	1340			24 hrs.	1969	14	5	14
Augusta, Ga.	76.0	29.7	42	*AUG	5,000	1050	120.0	44	Day	Pulse*	4	4	3
				*THB	1,000	1550			Day	Apr.-May	4	1	5
										1969			
Baltimore, Md.	477.0	23.6	7	*EBB	5,000	1360	477.0	9	Day	Pulse	7	7	7
				*SID	1,000	1010			Day	Jan.-Mar.	17	16	21
				WWIN	1,000	1400			24 hrs.	1969	24	17	26
Baton Rouge, La.	84.0	31.8	39	WXOK	5,000	1460	184.0	26	Day	Pulse*	14	8	15
										May 1968			
Beaumont, Tex.	73.0	20.7	44	KJET	1,000	1380	128.0	41	Day	Pulse*	15	10	19
										May 1969			
Birmingham, Ala.	239.0	33.4	17	WJLD	1,000D-250N	1400	305.0	18	24 hrs.	Pulse	37	39	35
				WENN	5,000	1320			Day	Feb.-Apr.	50	53	54
										1969			
Boston, Mass.	98.1	3.1	36	WILD	1,000	1090	100.0	49	Day	Pulse*	3	2	4
										Jan.-March			
										1969			
Buffalo, N. Y.	108.0	8.0	30	*UFO	1,000	1080	110.0	45	Day	Pulse*	5	2	9
										Jan.-March			
										1967			
Charleston, S. C.	106.0	34.8	31	*PAL	1,000	730	182.0	27	Day			DNA	
Charlotte, N. C.	90.0	24.2	38	WRPL	1,000	1540	133.0	38	Day	Pulse*	14	17	9
				WGIV	1,000D-250N	1600			24 hrs.	Jan.-Mar.			
										1969			
Chattanooga, Tenn.	57.0	17.7	49	*NOC	1,000	1260	90.0	51	Day	Pulse*	12	7	22
										Oct.-Nov.			
										1968			
Chicago, Ill.	1,300.0	19.3	2	*VON	1,000D-250N	1450	1,340.0	2	24 hrs.	Pulse*	13	12	12
				WGRT	1,000	950			Day	Mar.-April	7	4	7
				*HEE	1,000	1570			Day	1969	-	-	-
				*[illegible]	1,000	[illegible]			Day		-	-	-

*General Market Survey
DNA - Data Not Available
9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

MAJOR NEGRO RADIO MARKETS

Market	Metro Negro Pop. (000)	Negro % Of Tot. Pop.	Mkt. Rank Tot. U.S. (Negro)	Station	Power	Freq.	Negro Pop. 0.5MV Cov. (000)	Mkt. Rank Based On 0.5MV Cov.	On Air	Audience Survey Rd Share: Source	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Cincinnati, Ohio	158.0	11.5	20	WCIN	5,000	1480	158.0	32	24 hrs.	Pulse* Apr.-June 1969	7	7	11
Cleveland, Ohio	310.0	15.1	11	WJMO WABQ	1,000D-250N 1,000	1490 1540	310.7	17	24 hrs. Day	Pulse* Jan.-March 1969	5	6	-
Columbia, S. C.	84.0	31.1	40	WOIC	5,000	1320	268.0	21	19 hrs.	Pulse Jan.-July '68	34	27	27
Columbus, Ga.	70.0	27.0	46	WOKS	1,000D-250N	1340	255.0	22	24 hrs.	Pulse* Jan.-Feb. '69	14	22	18
Columbus, Ohio	145.0	16.7	22	WVKO	1,000	1580	157.0	33	Day	Pulse* Jan.-Feb. '69	5	5	5
Dallas-Ft. Worth, Tex.	289.0	13.9	13	KNOK	1,000	970	460.0	10	20 hrs.	Pulse* Apr.-May '68	12	10	8
Danville, Va.	35.0	30.7	54	WILA	1,000	1580	100.0	48	Day			DNA	
Detroit, Mich.	764.0	18.7	3	WCHB WJLB	1,000 1,000D-250N	1440 1400	775.0	5	24 hrs. 24 hrs.	Pulse* Apr.-June 1969	5 4	5 3	4 4
Florence, S. C.	37.0	41.9	52	WYNN	250	540	130.0	40	Day			DNA	
Ft. Lauderdale, Fla.	148.0	20.1	21	WRBD	5,000	1470	343.0	16	Day	Pulse* June-Aug. 1968	9	6	0
Greensboro, N. C.	60.0	21.5	48	WEAL	1,000	1510	60.0	53	Day	Pulse Apr.-May 1969	44	37	51
Houston, Tex.	355.0	20.3	9	KCOH KYOK	1,000 5,000	1430 1590	355.0	15	20 hrs. 24 hrs.	Pulse* Apr.-June 1969	7 11	3 13	7 3
Indianapolis, Ind.	137.0	13.2	24	WILC-FM WGEE	- 5,000	- 1590	137.0	37	Day Day	Pulse* Apr.-May 1969	4 3	1 2	5 3
Jackson, Miss.	100.0	37.8	33	WOKJ	50,000D-10,000N	1550	435.0	11	19 hrs.	Pulse* Apr.-May 1969	31	28	27

*General Market Survey
DNA - Data Not Available
9/15/69

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EXHIBIT I
Page Three

R. J. REYNOLDS TOBACCO COMPANY

MAJOR NEGRO RADIO MARKETS

Market	Metro Negro Pop. (000)	Negro % Of Tot. Pop.	Mkt. Rank Tot. U.S. (Negro)	Station	Power	Freq.	Negro Pop. 0.5MV Cov. (000)	Mkt. Rank Based On 0.5MV Cov.	On Air	Audience Survey AA Share: Source	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Jacksonville, Fla.	123.0	23.9	28	WOBS WRHC	5,000 1,000	1360 1400	123.0	43	Day 24 hrs.	Pulse* April 1969	10 4	11 7	15 4
Kansas City, Mo.	143.0	11.6	23	KPRS KMKI(FM)	1,000	1590	143.0	35	Day	Pulse* Jan.-Mar. 1969	6 -	4 -	4 -
Lake Charles, La.	36.0	20.5	53	KACK	1,000	250	48.0	54	19 hrs.	Pulse* June-July 1969	15	16	13
Little Rock, Ark.	55.0	17.8	50	KOKY KALO	5,000 1,000D-500N	1440 1250	180.0	28	Day 19 hrs.	Pulse* March 1969	7 6	8 6	6 7
Los Angeles, Calif.	710.0	10.1	5	KGFJ XERB	1,000D-250N 50,000	1230 1090	960.0	4	24 hrs. 24 hrs.	Pulse* March-April 1969	5 1	4 1	4 -
Louisville, Ky.	100.0	12.5	34	WLOU	5,000	1350	110.0	46	Day	Pulse* Feb.-Mar. '69	6	2	7
Macon, Ga.	65.0	29.8	47	WIBB	5,000	1280	72.0	52	Day	Pulse* Apr.-May '69	19	24	20
Memphis, Tenn.	279.0	35.7	15	WLOK WDIA	1,000D-250N 50,000D-5,000N	1340 1070	2,310.0	3	24 hrs. 24 hrs.	Pulse* Apr.-May '69	6 23	9 5	8 28
Miami, Fla.	185.0	16.0	19	WMBM	250	1490	185.0	25	24 hrs.	Pulse* Feb.-Apr. '69	1	1	0
Milwaukee, Wisc.	125.0	8.9	27	WAWA WNOV	1,000 250	1590 860	125.0	42	Day Day	Pulse* Jan.-Mar. 1969	2 5	2 8	1 3
Mobile, Ala.	131.0	30.6	26	WGOK WMOO	1,000 50,000	900 1550	180.0	30	Day Day	Pulse* May 1969	13 5	10 11	20 2
Montgomery, Ala.	78.0	40.0	41	WRMA WAPX	1,000 1,000	950 1600	156.0	34	Day 20 hrs.	Pulse* March 1969	16 15	15 12	19 11
Nashville, Tenn.	98.0	18.4	37	WVOL WLAC	5,000 50,000	1470 1510	142.0	36	19 hrs. 24 hrs.	Pulse* May 1969	10 -	20 -	11 -
New Orleans, La.	333.0	32.0	10	WBOK WYLD	1,000D-250N 10,000	1230 940	510.0	8	24 hrs. 24 hrs.	Pulse* Jan.-Mar. 1969	12 14	11 9	[illegible] 17

*General Market Survey
NA - Data Not Available
[illegible]/15/69

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EXHIBIT I
Page Four

R. J. REYNOLDS TOBACCO COMPANY

MAJOR NEGRO RADIO MARKETS

Market	Metro Negro Pop. (000)	Negro % Of Tot. Pop.	Mkt. Rank Tot. U.S. (Negro)	Station	Power	Freq.	Negro Pop. 0.5MV Cov. (000)	Mkt. Rank Based On 0.5MV Cov.	On Air	Audience Survey MM Share: Source	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
New York, N. Y. (Includes Newark, N. J.)	1,917.0	11.9	1	WWRL	5,000	1600	1,917.0	1	24 hrs.	Pulse	29	36	25
				WLIB	1,000	1190			Day	Jan.-April 1969	-	-	-
				WNJR	5,000	1430			21 hrs.		22	22	20
Norfolk-Portsmouth-Newport News, Va.	244.0	25.0	16	WHIH	1,000D-250N	1400	370.0	13	24 hrs.	Pulse	17	14	24
				WRAP	5,000D-1,000N	850			24 hrs.	Oct. '68-Jan. '69	53	62	49
Pensacola, Fla.	47.0	19.1	51	WBOP	1,000	980	95.0	50	Day	Pulse* June-July 1968	27	22	31
Philadelphia, Pa.	761.0	26.2	4	WDAS	5,000D-1,000N	1480	770.0	6	24 hrs.	Pulse*	4	6	4
				WHAT	1,000D-250N	1340			24 hrs.	Jan.-March '69	3	3	2
Pittsburgh, Pa.	190.0	8.0	18	WZUM	1,000	1590	190.0	24	Day	Pulse*	-	1	-
				WAMO	1,000	860			20 hrs.	Jan.-March 1969	4	2	5
Raleigh-Durham, N. C.	100.0	26.3	35	WSRC	1,000	1410	235.0	23	Day	Pulse*	-	-	-
				WLLE	500	570			Day	Jan. 1969	10	11	13
Richmond, Va.	131.0	25.3	25	WANT	1,000	990	180.0	29	Day	Pulse	21	24	18
				WENZ	1,000	1450			Day	Apr.-May 1968	35	23	23
San Antonio, Tex.	71.0	8.4	45	KAPE	500	1480	103.0	47	Day	Pulse* March 1969	7	11	6
San Francisco-Oakland, Calif.	302.0	9.7	12	KSOL	1,000D-250N	1450	302.0	19	24 hrs.	Pulse*	2	1	1
				KDIA	5,000	1310			24 hrs.	Feb.-March '69	5	2	5
Savannah, Ga.	76.0	35.1	43	WSOK	1,000	1230	131.0	39	24 hrs.	Pulse* March 1968	23	27	32
Shreveport, La.	112.0	35.1	29	KCLA	10,000D-500N	1550	407.0	12	20 hrs.	Pulse* Sept. 1968	28	29	29
St. Louis, Mo.	366.0	15.9	8	KATZ	5,000	1600	366.0	14	22 hrs.	Pulse*	4	3	2
				KXLW	1,000	1320			Day	Jan.-Mar. 1969	1	-	1
Tampa/St. Petersburgh, Fla.	102.0	21.1	32	WTMP	5,000	1150	105.0	31	Day	Pulse* May 1969	6	6	7
Washington, D. C.	588.0	[illegible]	6	[illegible]	[illegible]	[illegible]	588.0	7	24 hrs.	Pulse*	4	4	-
				[illegible]	[illegible]	[illegible]			Day	Jan.-Mar.	2	1	[illegible]
				[illegible]	[illegible]	[illegible]			24 hrs.	[illegible]	10	9	11

*General Market Survey
9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

NEGRO NEWSPAPERS IN MAJOR NEGRO RADIO MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code#	Edition	Circulation	Open Line Rate	Milline	Color
Atlanta, Ga.	285,000	22.6	Daily World	(4)&(8)	Daily	21,000	.19	8.90	-
Augusta, Ga.	76,000	29.7	Weekly Review		NA	2,850	NA	NA	-
Baltimore, Md.	477,000	23.6	Afro-American	(2)	Tues.	33,079 ABC	.58	8.20	Available
					Sat.	34,751 ABC			
Baton Rouge, La.	84,000	31.8	News Leader	(8)	Sat.	15,500	.12	7.61	-
Birmingham, Ala.	239,000	33.4	World	(4)&(8)	Sat.	9,000	.13	1.19	-
			Mirror		NA	14,000	NA	NA	-
Boston, Mass.	98,100	3.1	Roxbury City News (Tab.)		Thurs.	19,328	.20	10.17	Available
Buffalo, N. Y.	108,000	8.0	Challenger (Tab.)		Thurs.	15,000	.1428	9.36	Available
Charlotte, N. C.	90,000	24.2	Post		Sat.	18,265	.10	5.38	-
Chattanooga, Tenn.	57,000	17.7	Observer	(8)	Wed.	4,200	.09	21.07	-
Chicago, Ill.	1,300,000	19.3	Defender (Tab.)	(5)&(7)	Daily(M-Th.)	33,320 ABC	.3525	10.40	Available
					weekend	36,458 ABC	.4125	11.18	Available
			Courier	(1)&(7)	Fri.	8,259	.30	35.70	-
			New Crusader (Tab.)	(6)	Sat.	21,110	.56	26.07	Available
Cincinnati, Ohio	158,000	11.5	Herald		NA	17,500	NA	NA	-
			Call & Post/5 Star	(11)	Sat.	7,490 ABC	.25	31.14	Available
Cleveland, Ohio	310,000	15.1	Call & Post	(11)	Sat.	32,442 ABC	.25	7.58	Available
			Ohio Courier	(1)&(7)	Sat.	3,293	.30	85.55	Available
Columbia, S. C.	84,000	31.1	Palmetto Times		Thurs.	4,000	.15	35.80	-
Columbus, Ga.	70,000	27.0	Columbus News		Thurs. & Sat.	1,000	.18	12.53	-

#Newspaper can be purchased as part of a group. - See Exhibit II/III
ABC - Audit Bureau of Circulation
9/15/69

R. J. REYNOLDS TOBACCO COMPANY

NEGRO NEWSPAPERS IN MAJOR NEGRO RADIO MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code#	Edition	Circulation	Open Line Rate	Milline	Color
Columbus, Ohio	145,000	16.7	Call & Post	(11)	Sat.	4,958 ABC	.25	49.56	Available
Dallas, Tex.	289,000	13.9	Express	(3)	Sat.	4,600 ABC	.15	32.06	Available
			Post Tribune		Sat.	25,000	.25	[illegible]	-
Detroit, Mich.	764,000	18.7	Michigan Chronicle	(7)	Sat.	47,233 ABC	.40	8.33	-
			Courier	(1)&(7)	Sat.	15,925	.30	18.52	-
Greensboro, N. C.	60,000	21.5	Future Outlook		Sat.	9,543	.25	24.71	-
Houston, Tex.	355,000	20.3	Informer	(3)	Sat.	6,173 ABC	.20	23.86	Available
Indianapolis, Ind.	137,000	13.2	Recorder		Sat.	11,092 ABC	.20	17.72	-
Jackson, Miss.	100,000	37.8	Advocate		Sat.	6,000	.10	16.38	-
			Free Press		Sat.	5,340	.14	25.77	-
Jacksonville, Fla.	123,000	23.9	Florida Star & News		Sat.	25,374	.20	7.75	-
Kansas City, Mo.	143,000	11.6	Call		Fri.	19,050	.25	12.90	-
Lake Charles, La.	36,000	20.5	News Leader	(9)	Sat.	10,000	.12	11.90	-
Los Angeles, Calif.	710,000	10.1	Sentinel		Thurs.	41,482 ABC	.32	7.58	Available
			Herald Dispatch		Thurs. & Sat.	22,000	NA	NA	-
Louisville, Ky.	100,000	12.5	Defender		Thurs.	5,634 ABC	.18	31.41	Available
Macon, Ga.	55,000	29.8	Macon Reporter		Sat.	7,500	.18	23.55	-
Memphis, Tenn.	279,000	35.7	Tri-State Defender	(7)	Sat.	22,600	.18	7.92	Available
			World	(4)&(8)	Sat.	6,000	.10	16.38	-
Miami, Fla.	185,000	16.0	Florida Star & News		Sat.	6,016 (See Jacksonville for combo. rates)			
			Times (Tab.)		Fri.	14,500	.25	16.55	-
			Florida Courier	(1)&(7)	Sat.	15,044	.30	16.50	-

#Newspaper can be purchased as part of a group - See Exhibit II/III
ABC - Audit Bureau of Circulation
9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

NEGRO NEWSPAPERS IN MAJOR NEGRO RADIO MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code/	Edition	Circulation	Open Line Rate	Milline	Color
Milwaukee, Wisc.	125,000	8.9	Milwaukee Star		NA	16,537	NA	NA	-
Mobile, Ala.	131,000	30.6	Beacon		Sat.	5,000	.12	23.59	-
Nashville, Tenn.	98,000	18.4	Commentator		NA	3,450	NA	NA	-
Newark, N. J.	428,000	16.0	Afro-American	(2)	Sat.	5,212	.18	33.95	Available
			Herald News		Sat.	5,281	.20	37.87	Available
New Orleans, La.	333,000	32.0	Louisiana Weekly		Sat.	17,383 ABC	.25	14.14	Available
New York, N. Y.	1,489,000	10.4	Queens Voice (Tab.)		Fri.	21,000	.45	21.07	-
			Amsterdam News		Sat.	82,123 ABC	.80	9.58	Available
			Courier	(1)&(7)	Sat.	13,016	.30	22.65	-
			Westchester Co. Press (Tab.)		Thurs.	5,000	.16	31.46	Available
			New York Recorder		NA	17,520	NA	NA	-
Norfolk-Portsmouth, Va.	244,000	25.0	Journal & Guide		Sat.	28,576 ABC	.21	7.23	Available
Philadelphia, Pa.	761,000	16.2	Tribune		Tues. Sat.	38,571 ABC) 36,284 ABC)	.60	7.88	-
			Afro-American	(2)	Sat.	3,514 ABC	.15	41.96	Available
			Courier	(1)&(7)	Sat.	1,242	.30	237.44	Available
			Independent (Tab.)		Sat.	12,067	.30	2.44	Available
Pittsburgh, Pa.	190,000	8.0	Courier (City/Ed.)	(1)&(7)	Sat.	13,372	.50	35.75	Available
Raleigh, N. C. (Durham, N. C.)	100,000))	26.3))	Carolinian Carolina Times		Sat. Sat.	3,978 11,249	.20 .23	21.96 20.10	Available Available
Richmond, Va.	131,000	25.3	Afro-American	(2)	Sat.	17,114 ABC	.25	14.30	Available
San Antonio, Tex.	71,000	8.4	Register		Fri.	5,924	.12	11.23	-

/Newspaper can be purchased as part of a group. - See Exhibit II/III
ABC - Audit Bureau of Circulation
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R. J. REYNOLDS TOBACCO COMPANY

NEGRO NEWSPAPERS IN MAJOR NEGRO RADIO MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code/	Edition	Circulation	Open Line Rate	Milline	Color
San Francisco-Oakland, Calif.	302,000	9.7	Sun Reporter (Tab.)		Sat.	9,949 ABC	.18	$ 17.78	Available
			Voice		Thurs.	12,500	.15	11.80	Available
Savannah, Ga.	76,000	35.1	Herald (Tab.)		Sat.	4,000	.15	36.86	-
Shreveport, La.	112,000	35.1	Sun		Thurs.	12,748	.10	7.71	-
St. Louis, Mo.	366,000	15.9	Argus		Fri.	8,924	.20	22.03	Available
			East St. Louis Monitor		NA	7,655	NA	NA	-
			American		NA	9,300	NA	NA	-
Tampa-St. Petersburg, Fla.	103,000	11.1	Sentinel-Bulletin (Tab.)		Tues. Sat.	15,000) 10,500)	.30	11.80	-
			News-Reporter		Sat.	4,920	.15	29.97	-
Washington, D. C.	588,000	24.0	Afro-American	(2)	Tues. Sat.	8,608)ABC) 9,350)ABC	.35	19.16	-

/Newspaper can be purchased as part of a group. - See Exhibit II/III
ABC - Audit Bureau of Circulation

9/15/69

R. J. REYNOLDS TOBACCO COMPANY

ADDITIONAL NEGRO NEWSPAPER MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code#	Edition	Circulation	Open Line Rate	Milline	Color
Albany, Ga.	30,000	31.4	Southwest Georgian	(8)	Wed.	2,900	$ .08	$ 27.12	-
Alexandria, La.	39,000	30.4	News Leader	(9)	Sat.	10,500	.12	11.24	-
Asbury Park, N. J.	NA	NA	Central Jersey News		Thurs.	13,500	.15	11.90	-
Charlottesville, Va.	11,200	16.1	Tribune		Fri.	2,500	.05	19.60	-
Dayton, Ohio	83,190	9.9	Dayton Express		Thurs.	3,400	.125	36.14	-
Denver, Colo.	60,200	3.7	Blade		Thurs.	9,500	.25	28.87	-
Des Moines, Ia.	11,300	3.9	Iowa Bystander		Thurs.	2,592	.14	53.09	-
Fort Pierce, Fla.	NA	NA	Chronicle		Thurs.	2,500	.10	39.32	Available
Joliet, Ill.	NA	NA	The Voice		NA	3,000	NA	NA	NA
Minneapolis-St. Paul, Minn.	25,900	1.6	Spokesman	(10)	Thurs.	10,416	.25	23.59	-
			Twin City Observer		NA	8,535	NA	NA	-
			Recorder	(10)	Thurs.	10,416	.25	28.35	-
			Sun		NA	6,375	NA	NA	-
Monroe, La.	38,300	31.5	News Leader	(9)	Sat.	10,000	.12	11.80	-
Muskogee, Okla.	NA	NA	Heralo		NA	1,000	NA	NA	-
Oklahoma City, Okla.	44,700	7.4	Black Dispatch		Fri.	15,500	.23	8.36	-
Phoenix, Ariz.	35,900	3.9	Arizona Tribune		Thur.	3,300	.15	44.06	Available
Roanoke, Va.	22,800	12.3	Tribune (Tab.)		Thurs.	15,200	.10	6.47	-
Rockford, Ill.	11,100	4.3	The Crusader		NA	4,800	NA	NA	-
Sacramento, Calif.	31,200	4.0	Observer		NA	13,000	NA	NA	-
San Diego, Calif.	57,600	4.7	The Voice		Thurs.	10,000	.22	21.[illegible]	Available
			Light House		NA	8,500	NA	NA	-
Sarasota, Fla.	9,800	NA	Weekly Bulletin		NA	23,210	NA	NA	-

#Newspaper can be purchased as part of a group - See Exhibit II/III

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R. J. REYNOLDS TOBACCO COMPANY

ADDITIONAL NEGRO NEWSPAPER MARKETS

Metro Area	Negro Metro Area Population	Negro % Of Mkt. Pop.	Newspaper	Group Code#	Edition	Circulation	Open Line Rate	Milline	Color
Toledo, Ohio	53,300	7.7	Bronze Raven		NA	7,800	$ NA	$ NA	-
Tulsa, Okla.	33,100	7.3	Oklahoma Eagle		NA	8,049	NA	NA	-
Waco, Tex.	27,600	16.9	Messenger		NA	3,000	NA	NA	-
West Palm Beach, Fla.	63,600	21.4	Photo News		Thurs.	2,370	.12	49.77	-
Wichita, Kans.	23,700	6.0	Enlightener		Sat.	2,400	.15	61.44	-
Wilmington, N. C.	20,800	21.3	Journal		Sat.	6,025	.15	24.47	Available
Youngstown-Warren, Ohio	55,600	9.8	Buckeye Review		NA	2,836	NA	NA	-

#Newspapers can be purchased as part of a group. - See Exhibit II/III

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R. J. REYNOLDS TOBACCO COMPANY

NEGRO NEWSPAPERS

GROUP BUYS

Group Code	Group	# Of Editions	Total Group Circulation	Combined Group Line Rate	Milline	Circulation Breakdown by Edition	
1	Courier Group	9	92,495	$ .80	$ 8.65	Chicago	8,259
						Detroit	15,925
						Philadelphia	1,242
						Pittsburgh City	13,372
						New York	13,016
						National	13,634
						Florida	15,044
						Georiga	8,710
						Ohio	3,293
2	Afro-American Group*	8	139,436	1.20	8.60	Washington, D. C.	17,958
						New Jersey	5,212
						Philadelphia	3,514
						Baltimore	67,830
						Richmond	17,114
						National	13,032
						North Carolina	8,141
						South Carolina	6,635
3	Informer Newspapers*	2	10,773	.34	31.02	Houston Informer	6,173
						Dallas Express	4,600
4	World Group	3	36,000	.34	9.44	Atlanta	21,000
						Birmingham	9,000
						Memphis	6,000
5	Chicago Defender	2	69,778	.64	9.17	Chicago	69,778
6	Crusader Group	2	30,839	.85	27.56	New Crusader	21,110
						Gary Crusader	9,729
7	Sengstacke Publications	13	232,106	1.60	6.89	Chicago Weekend Defender	33,320
						Chicago Daily Defender	36,458
						Michigan Chronicle	47,233
						Memphis Tri-State Defender	22,600
						Courier Group (9 papers)	92,495
8	Scott Syndicate	5	43,100	.42	9.74	Atlanta	21,000
						Birmingham	9,000
						Memphis	6,000
						Southwest Georgian	2,900
						Chattanooga Observer	4,200
9	News Leader Group	4	4[illegible],000	.42	9.23	Alexandria	10,500
						Baton Rouge	15,500
						Monroe	10,000
						Lake Charles	10,[illegible]

*Member Papers are AEC

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[illegible]

[illegible]

GROUP BUYS

Group Code	Group*	# Of Editions	Total Group Circulation	Combined Group Line Rate	Milline	Circulation Breakdown by Edition	
10	Spokesman Recorder	2	20,832	$ .36	$ 17.28	Minneapolis Spokesman St. Paul Recorder	10,416 10,416
11	Cleveland Call & Post*	3	45,290	.30	6.62	Cleveland Columbus [illegible]	32,442 [illegible] [illegible]

*Member Papers are ABC

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R. J. REYNOLDS TOBACCO COMPANY

EXHIBIT IV
Page One

MAGAZINES

NEGRO

Publication	Frequency	Circulation	Page B&W Cost*	Page B&W CPM#	Page 4-C Cost	Page 4-C CPM#	Closing Dates
Ebony	Monthly	1,200,000(ABC)	$ 7,044	$ 5.87	$10,890	$ 9.07	B&W - 26th of 3rd preceding month 4-C - 26th of 3rd preceding month
Tuesday (Newspaper Supplement)	Monthly	1,700,000	11,200	6.59	13,600	8.00	B&W - 55 days (8th Monday) prior to date of issue 4-C - 55 days (8th Monday) prior to date of issue
Jet	Weekly	400,000	1,025	2.56	1,400(2C)	3.50	B&W - 1st Wed. prior to on-sale (iss. Thurs. prec. cover date) 2-C - 1st Wed. prior to on-sale (iss. Thurs. prec. cover date)
Tan	Monthly	150,000	750	5.00	1,166	7.77	B&W - 26th of 3rd preceding month 4-C - 26th of 3rd preceding month
Sepia	Monthly	55,000(Est.)	500	9.09	NA	-	B&W - 18th of 3rd preceding month 4-C - Not Available

*Open Rate
#CPM based on circulation

9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

EXHIBIT IV
Page Two

MAGAZINES

NEGRO

Publication	Frequency	Circulation	Page B&W Cost*	Page B&W CPM#	Page 4-C Cost	Page 4-C CPM#	Closing
Negro Traveler & Conventioneer	Monthly	53,000	$ 762	$14.38	$ 1,115	$21.00	B&W - 1st of preceding month 4-C - 25th of second prec. month
Crises (NAACP Pub.)	Monthly	115,000	862	7.49	1,650	14.35	B&W - 1st of preceding month 4-C - 1st of preceding month

*Open Rate
#CPM based on circulation

9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

DEMOGRAPHIC CHARACTERISTICS

EBONY

Circulation	1,200,000
Adult Readers	4,010,000
Male Readers	1,853,000 (46%)
Female Readers	2,157,000 (54%)

Age Of Readers	Male	Female
18-24	561,000 (30%)	653,000 (30%)
25-34	334,000 (18%)	466,000 (22%)
35-49	533,000 (29%)	634,000 (29%)
50+	425,000 (23%)	404,000 (19%)
Household Income		
Under $5,000	568,000 (30%)	825,000 (38%)
$5,000-$10,000	793,000 (43%)	858,000 (40%)
$10,000+	492,000 (27%)	474,000 (22%)
Education		
Grammar School or less	390,000 (21%)	402,000 (19%)
Some High School	515,000 (28%)	626,000 (29%)
Graduated High School	397,000 (21%)	539,000 (25%)
Some College	347,000 (19%)	393,000 (18%)
College Graduate	204,000 (11%)	197,000 (9%)
Occupation		
Professional Technical	195,000 (11%)	179,000 (8%)
Managers Officials	67,000 (4%)	130,000 (6%)
Clerical & Sales	171,000 (9%)	174,000 (8%)
Foreman & Skilled	204,000 (11%)	248,000 (12%)
Unskilled & Farm	776,000 (41%)	1,116,000 (52%)
Unemployed & Students	440,000 (24%)	310,000 (14%)
Geographic Area		
Northeast	501,000 (27%)	545,000 (25%)
Metro New York	359,000 (19%)	438,000 (20%)
Other Northeast	142,000 (8%)	107,000 (5%)
North Central	385,000 (21%)	534,000 (25%)
South	644,000 (35%)	739,000 (34%)
West	323,000 (17%)	339,000 (16%)

9/15/69

50198 9280

EXHIBIT C

R. J. REYNOLDS TOBACCO COMPANY

OUTDOOR

NEGRO

Market	Criterion - 3 Sheet		Junior Posters - 6 Sheet	
	Number of Posters	Monthly Cost	Number of Posters	Monthly Cost
Atlanta, Ga.	-	$ -	50	$ 1,613
Baltimore, Md.	150	1,575	50	1,000
Birmingham, Ala.	-	-	50	1,000
Boston, Mass.	50	525	30	825
Chicago, Ill.	250	2,625	150	3,000
Cincinnati, Ohio	-	-	40	960
Cleveland, Ohio	100	1,050	60	1,440
Columbus, Ohio	90	945	30	480
Dallas, Tex.	-	-	40	1,000
Detroit, Mich.	125	1,313	60	1,155
Fort Worth, Tex.	-	-	15	293
Houston, Tex.	-	-	60	1,855
Indianapolis, Ind.	25	263	30	600
Kansas City, Mo.	55	578	40	1,200
Los Angeles, Calif.	50	525	200	6,000
Memphis, Tenn.	-	-	50	1,125
Milwaukee, Wisc.	50	525	40	960
Newark, N. J.	50	525	100	2,300
New Orleans, La.	-	-	50	925
New York, N. Y.	220	2,310	250	6,250
Norfolk-Portsmouth, Va.	-	-	40	800
Philadelphia, Pa.	200	2,100	100	2,300
Pittsburgh, Pa.	50	525	50	1,100
Richmond, Va.	-	-	30	600
San Francisco, Calif.	70	735	70	2,450
St. Louis, Mo.	175	1,838	60	1,410

9/15/69

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ADVERTISING PLANNING

50198 9282

R. J. Reynolds

NEGRO MARKET STUDY

IV. Advertising Planning

A. Nature of the Market

Few fields of marketing are in so pronounced a state of confusion as that of selling to the Negro consumer. Some firms even seem uncertain about how to proceed. They are unsure of choice of media, type of appeal, mode of presentation, and above all, the element of good taste. Systematic market studies are scarce and much of what is available comes from Negro media and so may serve specialty interests. In addition, Negro consumers themselves are responsible for confusing many potential advertisers in Negro-oriented media. For instance, some demand to be referred to as black, another group is sensitive to any name other than Afro-American, another group wants to be called Negro, and some still insist on "colored". Despite these handicaps, some guidelines can be set forth which reveal some very important distinguishing characteristics.

This market can be defined as two predominant groups, the "haves" and the "have-nots". The Negro middle class, the haves, is socialogically farther removed from lower income Negroes, the have-nots, than middle class whites

are from low income whites. The five million Negro members of the middle class (often defined as those with family incomes of $6,000 or more) not only control a large fraction of Negro discretionary spending, but also are sensitive to poor taste and willing to do something about it. This middle class, while only about 22% of this Ethnic group, comprises the most influential buyers among Negroes. Usually, these people are the elders and more often than not follow the teachings of the late Dr. Martin Luther King and, in addition, pattern their living on white norms.

The middle-class Negro has little in common with the low income one. The gulf between poor and prosperous widens as white collar and professional jobs open up faster than the much-needed blue collar jobs. The Negro market is very young with a median age of 21 as compared with 29 for the white market. The younger segment of the Negro population, the low class, is divided. One group wants only to leave the ghetto. The other prefers to stay in the ghetto and go "militantly Black". The youngster who idolizes Stokely Carmichael or goes all out for the "natural Afro look" does not identify with his elders.

It should be understood, however, that there is a trend toward "blacks getting together". This is evidenced

in some identifiable forms. Membership in ethnocentric organizations is on the increase. More magazines and newspapers serving black readership have been initiated. One of the most successful contests held recently was the "Miss Black America" Contest. This is not to indicate that efforts to eliminate discrimination in the Miss America Contest are being abandoned, but rather that the Negro community collectively will accept and support a Miss Black America. Organizations are being created, such as the National Housing Producers Association, which is comprised of black contractors, joining together to achieve certain goals.

The Negro society today is essentially a matriarchal one with the woman of the house making most of the decisions. One out of four Negro families has a female head-of-household as compared with one out of ten white families. They play a more important role in holding families together than their white counterparts. In the District of Columbia, 53% of the potential Negro women's work force is employed; Florida is second with 52% and the greater metropolitan New York market is third with 50%. With the average employed Negro woman contributing about 32% of the average median income, her consumer advice is heeded. However, as employment opportunities open up for the Negro male, he is beginning to play a

more important part in family life.

In addition to the emergence of the Negro male to become an influential decision maker, is the search of the Negro female for her real identity. In the typical sociological diagram of American power and prestige, the Negro woman is at the bottom of the heap. Above her is the black male, then the white female, and, at the top, stands the white male. The majority of Negro women are still imitating the styles and attitudes of white women who are considered more sexy and attractive. The white image is deep inside them, planted there by a lifetime of exposure to white standards of beauty as reflected in the media. Now a movement is underway to elevate the Negro woman, to reshape her vision of herself from broad-beamed kitchen laborer and head-of-household to svelte femininity, to make her a target of male desire and to give her a separate identity that is black, warm, and cherishable. Although her role is beginning to change rapidily, today it is the Negro male who dominates the movement, venturing along new paths, and presenting an image of defiance and resolution.

The Negro market means many things to many people. To some firms, the Negro is a consumer like anybody else. To others, he is among many special markets in the demographic spectrum. But to an increasing number, he is

one of several Ethnic groups that deserve special consideration. Mr. H. N. Fitzhugh, Pepsi Cola Vice President for Special Markets says, "If companies treated Negroes as they do everyone else, there would be no Negro market". What he means is that the Negro is indeed a separate and distinct market when seen by a marketer but not so from the point of view of the Negro himself. Business Week says it this way, "They just want to be part of the mainstream. Every guy in the street wants what whitey has. They want the opportunity to live the life that TV says everybody lives".

Although Negroes have the same wants, desires, and needs as any other group, there is one significant difference. He sees America through a prism of 350 years of discrimination. As a consequence, he has a great need for recognition as part of U. S. society. This makes him hypersensitive to real or fancied slights, whether in advertising, the retail outlet, or in employment practices. As a result of this, Negroes generally express greater national brand loyalty than do whites. They are sceptical of private label and associate national brands with quality. Because of this association, they put more confidence in these brands thereby attempting to avoid the embarrassment of "being took". From a marketing point of view, it is important to remember

that loyalty associated with quality or brand image is stronger than loyalty associated with low prices or bargains; white consumers tend to be low price and bargain shoppers. Another reason Negroes consistently buy the brands that are nationally advertised is that they are the ones that have the prestige connotation. Negroes have deep psychological needs and often feel left out or forced outside. Often the association of a name product with themselves provides a lift. However, this brand loyalty discussion is not intended to imply that Negroes do not switch brands, because they do. The distinguishing characteristic is that, rather than their brand preferences being spread over six or seven brands in a given category, their selections tend to cluster among two or three brands within a particular product group. And within these two or three brands, they can be influenced to switch. Joe Black, former major league pitcher and now a Greyhound vice president, has stated: "One can safely say that the Negro market is a general market in itself. It has teenagers, females, millionaires, paupers, mass and class facets, and the common denominator that unites it is the psychological inferiority complex that has been generated through fallacious and outmoded stereo-types".

B. Reaching (Strategy Development)

In trying to reach this market, there are three operating

modes: Negro-oriented advertising, Neutral advertising, and Integrated advertising.

1. Negro-Oriented Advertising

Negro oriented advertising is that advertising which uses Negro models in realistic Negro situations, is placed in media oriented to Negroes, and is executed so to primarily establish conviction and believability in the minds of the Negro audience. This is believed to be the most effective technique for influencing the Negro consumer because it reassures him that the product is meant for him. Effective advertising should reflect realistic considerations of the Negro consumer as a Negro, be placed in media oriented to his interests, and usually should not be white-oriented campaigns with Negro model substitutes.

2. Neutral Advertising

Product advertising, sometimes referred to as package advertising, is considered neutral, since it does not have people, and it can be used generically in any customer-oriented media. There is another form of neutral advertising which is the use of regular advertising in all media, white and Negro, counting on the basic appeal of the product to sell it, wherever it is placed.

Neutral advertising is not as influential with Negroes

as Negro-oriented advertising because of its neutrality. Because he is so aware and proud of his highly visible and different outward appearance, he prefers advertising keyed to him.

3. Integrated Advertising

There is much debate about whether integrated ads, no matter what the medium, help sell products to Negroes. Integrated advertising is that which is prepared primarily for white-oriented media, that includes Negroes either in starring, featured, or walk-on roles. It is more a public relations strategy than a marketing strategy. Negroes and sometimes other non-white models are used with whites in television commercials and print ads primarily to "secure a more realistic portrayal of the role of minority groups in our national life" and in the companies which use them, Its use is primarily to fulfill an official or unofficial commitment to include Negroes and identifiable members of other minority groups in advertising. Although it is doubtful that this is an effective technique to influence Negro consumers, white reaction generally has been favorable. However, W. L. Evans, President and Editor of Tuesday magazine says that "inclusion of Negroes in TV commercials was part of a social crusade and political consideration. There was no thought at the time,

nor since--to my knowledge--of any relationship between the use of Negroes in TV ads and sales stimulation. What the hell does integrated advertising have to do with motivation of sales? No one knows. And there is no evidence that there is any basic increase because of it".

C. Influencing (Execution Development)

To advertise most effectively to this market the key consideration is to determine the decisive versus the non-decisive motivations of this segment of the market. It generally is not as effective to aim at the Negro consumer as such, as it is to aim at his decisive motivations. The question, then, becomes what are his decisive motivations.

Newly-acquired pride and self-confidence are changing his buying habits. Advertising must be structured to appeal to this pride, keeping in mind that this is a segment of the population which is only beginning to emerge out of economic doldrums. General media messages are aimed at the white masses who have "arrived" at a comfortable economic level. Negro masses are only at a point in time when economic security is a possibility. They have only begun to feel the freedom of economic security. Quality rates as a cherished attribute. Negroes buy the best Scotch as long as the money lasts, most marketers agree.

There are changing moods in the Negro national community. In both fashion and outlook, there is no single Negro market and, as has been discussed, there are attitude differences between age and economic groups. One of the most significant changes evolves around the word "black". Blackness is more of a feeling than color description; and it is especially felt in major urban markets today and particularly among the younger Negro. The desire for blackness, or soul, as part of solving their identity crisis is something that must be understood. A sense of identity is being accentuated because today, as never before, Negroes are taking pride in themselves.

Another motivation is the emerging images of the dominant male and the romantically desirable female. As has been pointed out, Negro society has essentially been a matriarchial one with the woman of the house making most of the decisions. However, with more career opportunities available to the male than ever before, plus his increased education level, his role is changing and supplanting that of the dominating female; she is beginning to find her standards of Negro feminine beauty and has begun to strive to attain them.

But perhaps one of the most important decisive motivations of the Negro consumer is best reflected in the results of a regional study about beer among white, Negro, and

Puerto Rican consumers. Reaction to product benefits (lightness, body, color, etc.) were about the same. Differences occurred, however, when personal versus social motivations were considered. Negroes placed very little emphasis on the social interaction associated with drinking although Puerto Ricans placed much emphasis on it. On the other hand, Negroes placed great emphasis on the personal satisfaction of drinking beer and Ruerto Ricans did not.

Obviously, the point here is that personal satisfaction derived from a product is perhaps one decisive motivation of Negroes and any attempt to sell them had better take this into primary consideration.

The strategy for advertising to Negroes through their media is to create "Negro upscale situations" and to make these consumers feel that the advertising is directed to them. Negro principles should be used against the background of identifiable settings and situations in which they might find themselves. When considering settings, the "outdoors" (hunting, skiing, sailing) is not felt to be suitable, as these are still considered unfamiliar to the Negro in general, and part of the luxuries afforded only whites. However, there are settings which could be universal to both white and black consumers (i.e., Pepsi's commercial showing an integrated football

team at work). Effectiveness depends upon the degree of Negro realism captured in the situations in which the Negroes are principals. Negroes are primarily urban dwellers, and as such, settings and situations used should reflect this. Examples of urban situations that could be used are:

- A scene outside a telephone booth on a busy street;
- A night out at a cocktail lounge;
- Driving an automobile in a traffic snarl;
- Just missing a bus; and
- Leaving a motion picture theater.

There should be no hard and fast rules for hair styles and mode of dress. Rather, each execution should be viewed individually to determine which would be most appropriate; whether models should have "bush", "Afro", or "straight" hair styles (each of these are distinctively different); and whether the models should wear the latest Negro fashion (currently a dashiki), the latest Mod fashions or some other style. The deciding factor in fashion considerations should be "good taste".

Copy strategy should not necessarily be different from that developed for general media. This is particularly true as long as the benefits of the product the copy alludes to have universal appeal (taste, satisfaction, flavor, etc.). A change in copy is not recommended to

include slang or "in" expressions unless there is sufficient reason, based on the particular situation developed. There are different levels of "in" expressions which ofttimes can have a rapid change in usage, and such expressions could be misread as "patronizing" or have other negative influences. Rather than using "in" words or phrases commonly felt peculiar to the Negro, it is more important to correctly and tastefully execute the Negro's identification in the setting.

The audio execution should provide the music and talent reflective of the media used. There are different "sounds" heard in radio today--rock and roll, semi-classical, top 40, good music, country and western, the British sound and mixtures of these. Importantly, there is the sound of the Negro's rhythm and blues, gospel, and the "Motown" sounds and mixtures of these. Interestingly enough, the rhythm and blues of Negro artists have been undertaken by white artists, and while some of this is very good, music in this "distilled" form rarely is heard on Negro-oriented radio stations.

Any good strategy will create the music for the campaign theme in the sound of rhythm and blues, which is the primary format of Negro-oriented radio stations. The beat, the tempo, and the "feeling" of the "Soul" music is almost instinctively identifiable to the Negro ear which is

accustomed to this sound. To use radio commercials and music that does not reflect this has to be less effective than the blending of campaign theme music with the "black sound".

However, there can be exceptions to commercials only having the "black sound". For example, the mystique of the Count Basie sound is universally motivating. Paul Moriat's "Love is Blue", another example, had a good play on Negro stations. Most important to advertisers was the result of the "EMBRA" commercial when played for ten Negro-programmed radio stations in five major Negro markets, to determine how it might be accepted by the audiences. Air personalities and station personnel, including men and women, at each station listened to the commercial and overwhelmingly approved it. While some felt it was a good change of pace, others pointed out that the music to them reflected "Negro upscale", "class", and romance. They concluded that the EMBRA mood is universally appealing.

Disc jockeys, who for the most part consider themselves entertainers, often are the best for the delivery of commercials, provided they do not have a "screaming" delivery often associated with Negro announcers. Many companies provide copy to be read live; others provide only an outline and allow the announcer to use his own

ability to communicate the sales message. Both of these have proven to be successful.

EXHIBIT I

R. J. Reynolds

NEGRO MARKET STUDY

Guidelines for Negro-Oriented Advertising

A. Select models with extreme care. Skin tones and facial features must be given careful consideration.

B. Models must be immediately identifiable.

C. Individuals need not be chosen for their beauty alone. More important, they must be good representatives of the community.

D. When preparing group advertising, avoid look-alike models.

E. Circumstances, situations and photographic backgrounds must be created with realism and believability to the Negro.

F. Backgrounds, situations, and models must create a sense of pride and dignity, especially of the male image.

G. Costuming should be reflective of the consumer whom you are trying to influence.

H. Slang expressions and phrases, popular in the market, are not recommended but may be used with discretion.

I. Relate product message with minimum copy that is easy to read and is in understandable terms.

J. Consider image-building in preparing print advertising.

K. Use language that is realistic to Negroes. Avoid expressions such as pale, lily-white, light and bright, etc.

L. Once a Negro campaign has been established, consider using one advertisement that reflects equal employment

opportunities.

M. Scheduling radio commercials at key times is of prime importance.

N. When possible radio advertising copy should be kept to a minimum, allowing the local broadcast personality to sell the product, in his own way.

O. When selecting music or jingles, avoid stereo-type quality. Select the "sound" that is reflective of the market.

EXHIBIT II

R. J. Reynolds

NEGRO MARKET STUDY

Guidelines for Integrated Advertising

A. Advertising must portray Negroes and identifiable members of other minority groups in a realistic manner.

B. Models should be selected with extreme care, especially when choosing for television commercials. Facial features and skin coloring should be of primary concern. Extremes of either "too light" or "too dark" should be avoided.

C. Unless it is a "public service" television commercial, it should be kept in mind that the primary audience is the majority population--white.

D. Avoid showing Negroes and other minority group members in stereo-type settings.

E. Avoid suggestion of "interracial couples" and social settings that would not be accurate portrayals.

F. Avoid physical contact across male/female lines between majority and minority group members, unless in realistic setting (i.e., hand shake, crowded elevator, etc.)

COMPETITIVE

50198 9301

R. J. Reynolds

NEGRO MARKET STUDY

V. Competitive Advertising Expenditures

P. Lorillard's 1969 Negro market budget was increased 87% over 1968. Most of this increase was due to the advertising entry of Newport in this market and the addition of the outdoor medium. In 1968, Newport was not advertised to Negroes and True was spending one-half P. Lorillard's Negro advertising budget. However, in 1969, the Negro market budget was increased 87%, up to $1,128,000 from $601,000 in 1968. Newport received 58%, or $658,000, and Kent received 34% or $383,000, of the 1969 Negro market budget. True, on the other hand, experienced a 71% budget cut, from $300,000 in 1968 to $87,000 in 1969.

British American also had a spectacular budget increase from $427,000 in 1968 to $1,139,000 in 1969. This was due primarily to a 70% increase in Kool's radio effort and the addition of Viceroy commercials on Negro radio.

R. J. Reynolds had the highest Negro advertising budget in 1968. After reducing it by almost 30% in 1969, Reynolds now has only about 57% of both P. Lorillard's and British American's expenditures aimed at this special market.

Total WINSTON's 1969 Negro market budget was decreased by $104,000, from $469,000 to $365,000. WINSTON SUPER KING

Menthol's budget was reduced by over 25% and its radio budget was cut almost in half; WINSTON SUPER KING radio was dropped completely: also, SALEM's budget was reduced by $132,000.

In 1968, Marlboro had a Negro magazine budget of $45,000 but in 1969 they spent only $1,000 in Negro newspapers. Phillip Morris' only other 1969 expenditure in this market was $90,000 for Benson & Hedges, all in Negro magazines. American Tobacco, also in 1969, is supporting Tareyon, $42,000 in magazines and $96,000 in radio, and Pall Mall, $48,000 for magazines. No company is advertising on the one television station and only Kent and Newport use billboards.

Negro Advertising Expenditures

(By Company/By Year)
(000)

	1968	1969
Total WINSTON	$469	$ 365
R. J. Reynolds	900	640
P. Lorillard	601	1,128
British American	427	1,139
American Tobacco	212	209
Philip Morris	53	100
Liggett & Meyers	25	115

R. J. Reynolds
WINSTON Negro Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1965	W85	$ -	$ -	$ -	$ -	$ -	$ -
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ -	$ -	$ -	$ -	$ -	$ -
1966	W85	$ -	$ -	$ -	$ -	$ -	$ -
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ -	$ -	$ -	$ -	$ -	$ -
1967	W85	$ -	$ -	$ -	$ -	$ -	$ -
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ -	$ -	$ -	$ -	$ -	$ -
1968	W85	$ -	$ -	$ -	$158	$ -	$158
	WSKS	-	-	-	105	-	105
	WM	51	-	-	155	-	206
	Total	$ 51	$ -	$ -	$418	$ -	$469
1969	W85	$ 60	$ -	$ -	$177	$ -	$237
	WSKS	33	-	-	-	-	33
	WM	12	-	-	83	-	95
	Total	$105	$ -	$ -	$260	$ -	$365

CGH/dm
8/22/69

50198 9304

Loews' Theatres
Negro Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kent	$ 33	$ 48	$ -	$210	$ -	$291
	Newport	-	-	-	-	-	-
	True	30	60	-	210	-	300
	Century	-	10	-	-	-	10
	Erik	-	-	-	-	-	-
	Old Gold	-	-	-	-	-	-
	Total	$ 63	$118	$ -	$420	$ -	$601
1969	Kent	$ 47	$ 2	$ -	$187	$147	$383
	Newport	65	176	-	269	148	658
	True	-	-	-	87	-	87
	Century	-	-	-	-	-	-
	Erik	-	-	-	-	-	-
	Old Gold	-	-	-	-	-	-
	Total	$112	$178	$ -	$543	$295	$1128

British American
Negro Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kool	$ 53	$ 20	$ -	$350	$ -	$423
	Viceroy	-	4	-	-	-	354
	Raleigh/ Belair	-	-	-	-	-	-
	Total	$ 53	$ 24	$ -	$350	$ -	$427
1969	Kool	$ 87	$ 31	$ -	$599	$ -	$717
	Viceroy	68	5	-	349	-	422
	Raleigh/ Belair	-	-	-	-	-	-
	Total	$155	$ 36	$ -	$948	$ -	$1139

50198 9305

CCH/dm
8/27/69

EXHIBIT I

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines Negro	Magazines Jewish	Magazines Spanish	Magazines Total	Newspapers Negro	Newspapers Jewish	Newspapers Spanish	Newspapers Total	Television Negro	Television Jewish	Television Spanish	Television Total	Radio Negro	Radio Jewish	Radio Spanish	Radio Total	Outdoor Negro	Outdoor Jewish	Outdoor Spanish	Outdoor Total	GRAND TOTAL
1965	RJR Brands																					
	WINSTON 85	$26	$ 7	$ -	$ 33	$ -	$41	$ 6	$ 47	$ -	$ -	$ 11	$ 11	$167	$53	$ 47	$267	$ -	$ -	$ -	$ -	$ 358
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	36	7	6	49	-	24	6	30	-	-	11	11	47	38	45	130	-	-	-	-	220
	TEMPO	-	9	-	9	-	56	-	56	-	-	-	-	-	23	-	23	-	-	-	-	88
	CAMEL	22	-	-	22	-	-	-	-	-	-	-	-	99	-	47	146	-	-	-	-	168
	TOTAL	$84	$23	$ 6	$113	$ -	$121	$12	$133	$ -	$ -	$ 22	$ 22	$313	$114	$139	$566	$ -	$ -	$ -	$ -	$ 834
1966	RJR Brands																					
	WINSTON 85	$31	$ 8	$ -	$ 39	$ -	$34	$ 6	$ 40	$ -	$ -	$ 50	$ 50	$227	$54	$ 50	$331	$ -	$ -	$ -	$ -	$ 460
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	41	7	6	54	-	16	6	22	-	-	50	50	653	7	61	721	59	-	-	59	906
	TEMPO	-	9	-	9	-	22	-	22	-	-	-	-	-	4	-	4	-	-	-	-	35
	CAMEL (R/F)	28	-	-	28	-	-	-	-	-	-	8	8	114	-	46	160	-	-	-	-	196
	TOTAL	$100	$24	$ 6	$130	$ -	$72	$12	$ 84	$ -	$ -	$108	$108	$994	$65	$157	$1,216	$59	$ -	$ -	$59	$1,597
1967	RJR Brands																					
	WINSTON 85	$ 17	$12	$ -	$ 29	$ -	$24	$ 4	$ 28	$ -	$ -	$ 55	$ 55	$ -	$19	$ 37	$ 56	$ -	$ -	$ -	$ -	$ 168
	WINSTON SKS	-	-	-	-	-	12	4	16	-	-	6	6	(I) 1	26	26	53	-	-	-	-	75
	WINSTON MENTHOL	17	-	-	17	-	4	1	5	-	-	-	-	(II) 297	21	10	318	-	-	-	-	340
	SALEM (85/SKS)	48	8	8	64	-	6	7	13	-	-	25	25	310	-	33	343	68	-	-	68	513
	TEMPO	-	2	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2
	CAMEL (R/F)	27	-	-	27	-	-	-	-	-	-	5	5	-	-	13	13	-	-	-	-	45
	TOTAL	$109	$22	$ 8	$137	$ -	$46	$16	$ 62	$ -	$ -	$ 91	$91	$598	$66	$119	$783	$68	$ -	$ -	$68	$1,143

(I) Special Negro effort - Chicago
WINSTON SKS $4[illegible],00
WINSTON MENTHOL $5,37[illegible].00
(II) WINSTON MENTHOL $[illegible] (Special Negro)

8/11/69
Revised
9/18/67

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EXHIBIT II

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines Negro	Magazines Jewish	Magazines Spanish	Magazines Total	Newspapers Negro	Newspapers Jewish	Newspapers Spanish	Newspapers Total	Television Negro	Television Jewish	Television Spanish	Television Total	Radio Negro	Radio Jewish	Radio Spanish	Radio Total	Outdoor Negro	Outdoor Jewish	Outdoor Spanish	Outdoor Total	GRAND TOTAL
1968	RJR Brands																					
	WINSTON 85	$ -	$ 6	$ -	$ 6	$ -	$25	$ 4	$ 29	$ -	$ -	$ 45	$ 45	$158	$35	$ 48	$241	$ -	$ -	$ -	$ -	$ 321
	WINSTON SKS	-	6	-	6	-	25	4	29	-	-	44	44	105	35	46	186	-	-	-	-	265
	WINSTON MENTHOL	51	-	-	51	-	-	-	-	-	-	-	-	155	-	-	155	-	-	-	-	206
	SALEM (85/SKS)	42	10	9	61	-	17	7	24	-	-	16	16	347	-	61	408	-	-	-	-	509
	CAMEL (R/F)	42	-	-	42	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	42
	TOTAL	$135	$22	$ 9	$166	$ -	$67	$15	$82	$ -	$ -	$105	$105	$765	$70	$155	$990	$ -	$ -	$ -	$ -	$1,343
	Loews' Theatres																					
	Kent	$33	$ -	$ -	$ 33	$ 48	$20#	$ 7*	$ 75	$ -	$ -	$ 21	$ 21	$210	$ -	$ 44	$254	$ -	$ -	$ -	$ -	$ 383
	Newport	-	-	-	-	-	20#	7*	27	-	-	21	21	-	-	44	44	-	-	-	-	[illegible]
	True	30	-	-	30	60	20#	7*	87	-	-	21	21	210	-	44	254	-	-	-	-	392
	Century	-	-	-	-	10	-	-	10	-	-	21	21	-	-	43	43	-	-	-	-	7[illegible]
	Erik	-	-	-	-	-	-	-	-	-	-	20	20	-	-	-	-	-	-	-	-	20
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$63	$ -	$ -	$ 63	$118	$60#	$21*	$199	$ -	$ -	$104	$104	$420	$ -	$175	$595	$ -	$ -	$ -	$ -	$ 961
	British-American																					
	Kool	$53	$ -	$ -	$ 53	$ 20	$10#	$ -	$ 30	$ -	$ -	$ 19	$ 19	$350	$ -	$ 39	$389	$ -	$ -	$ -	$ -	$ 491
	Viceroy	-	-	-	-	4	40#	-	44	-	-	-	-	-	-	38	38	-	-	-	-	82
	Raleigh/Belair	-	-	-	-	-	20#	-	20	-	-	-	-	-	-	-	-	-	-	-	-	20
	TOTAL	$53	$ -	$ -	$ 53	$ 24	$70#	$ -	$ 94	$ -	$ -	$ 19	$ 19	$350	-	$ 77	$427	$ -	$ -	$ -	$ -	$ 593

#Includes National Publications.
*Includes Teens.

8/11/69
Revised: 4/17

Sources for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) -
[illegible]
Newspapers - Media Representatives

50198 9307

EXHIBIT II (Cont.)

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1968 Cont.	American Tobacco																					
	Tareyton	$34	$ -	$ -	$ 34	$ -	$10//	$ -	$ 10	$ -	$ -	$ 11	$ 11	$ 40	$ -	$ 11	$ 51	$ -	$ -	$ -	$ -	$ 106
	Pall Mall	35	-	-	35	48	10//	-	58	-	-	12	12	40	-	11	51	-	-	-	-	156
	Carlton	-	-	-	-	-	-	1*	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Lucky Strike	15	-	-	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	15
	Silva Thins	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$84	$ -	$ -	$ 84	$ 48	$20//	$ 1*	$ 69	$ -	$ -	$ 23	$ 23	$ 80	$ -	$ 22	$102	$ -	$ -	$ -	$ -	$ 278
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 25
	Marlboro	45	-	-	45	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	45
	Benson & Hedges	-	-	-	-	8	-	-	8	-	-	-	-	-	-	-	-	-	-	-	-	8
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$45	$ -	$ -	$ 45	$ 8	$ -	$ -	$ 8	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 78

Sources for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) - PIB
[illegible]
[illegible] - [illegible]

//Includes National Publications.
*Includes Texas.

8/11/69
Revised 9/17

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EXHIBIT III

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969	RJR Brands																					
	WINSTON 85	$60	$ 7	$ -	$67	$ -	$27	$ 7	$ 34	$ -	$ -	$75	$ 75	$177	$35	$ 86	$298	$ -	$ -	$ -	$ -	$ 474
	WINSTON SKS	33	7	-	40	-	27	1	28	-	-	30	30	-	35	7	42	-	-	-	-	140
	WINSTON MENTHOL	12	-	-	12	-	-	-	-	-	-	-	-	83	-	-	83	-	-	-	-	95
	SALEM (85/SKS)	106	6	9	121	-	14	7	21	-	-	19	19	151	-	55	206	-	-	-	-	367
	DORAL	-	15	-	15	-	21	-	21	-	-	-	-	-	12	-	12	-	-	-	-	48
	CAMEL (R/F)	18	-	-	18	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18
	TOTAL	$229	$35	$ 9	$273	$ -	$89	$15	$104	$ -	$ -	$124	$124	$411	$82	$148	$641	$ -	$ -	$ -	$ -	$1,142
	Loews' Theatres																					
	Kent	$47	$ -	$ -	$ 47	$ 2	$43	$ 2	$ 47	$ -	$ -	$ 77	$ 77	$187	$ -	$ 84	$271	$147	$ -	$ 3	$150	$ 592
	Newport	65	-	-	65	176	43	2	221	-	-	77	77	269	-	81	350	148	-	3	151	864
	True	-	-	-	-	-	-	9	9	-	-	77	77	87	-	84	171	-	-	-	-	257
	Century	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Erik	-	-	-	-	-	-	-	-	-	-	-	-	-	-	22	22	-	-	-	-	22
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$112	$ -	-	$112	$178	$86	$13	$277	$ -	$ -	$231	$231	$543	$ -	$271	$814	$295	$ -	$ 6	$301	$1,735
	British-American																					
	Kool	$ 87	$ -	$ -	$ 87	$ 31	$ -	$ -	$ 31	$ -	$ -	$ 46	$ 46	$599	$ -	$ 42	$ 641	$ -	$ -	$ -	$ -	$ 805
	Viceroy	68	-	-	68	5	27	-	32	-	-	46	46	349	-	44	393	-	-	-	-	539
	Raleigh/Belair	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$155	$ -	$ -	$155	$ 36	$27	$ -	$ 63	$ -	$ -	$ 92	$ 92	$948	$ -	$ 86	$1,034	$ -	$ -	$ -	$ -	$1,344

[illegible] competitive information
[illegible] - Jewish [illegible]
Negro Magazine (Ebony) - PSB
[illegible] - Spanish [illegible]

8/11/69
Revised [illegible]/17

50198 9109

EXHIBIT III (Cont.)

P. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969 Cont.	American Tobacco																					
	Tareyton	$ 42	$ -	$ -	$ 42	$ -	$ 10	$ -	$ 10	$ -	$ -	$ 18	$ 18	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 166
	Pall Mall	48	-	-	48	81	10	-	91	-	-	18	18	-	-	-	-	-	-	-	-	157
	Carlton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lucky Strike	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Silva Thins	42	-	-	42	-	-	-	-	-	-	18	18	-	-	-	-	-	-	-	-	60
	TOTAL	$132	$ -	$ -	$132	$ 81	$ 20	$ -	$101	$ -	$ -	$ 54	$ 54	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 383
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 11	$ -	$ 23	$ 34	$ -	$ -	$ -	$ -	$ 37
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	-	-	-	-	1
	TOTAL	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 12	$ -	$ 23	$ 35	$ -	$ -	$ -	$ -	$ 38
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Marlboro	-	-	-	-	1	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Benson & Hedges	90	-	-	90	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	90
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lido	-	-	-	-	-	-	-	-	-	-	-	-	9	-	-	9	-	-	-	-	9
	TOTAL	$ 90	$ -	$ -	$ 90	$ 1	$ -	$ -	$ 1	$ -	$ -	$ -	$ -	$ 9	$ -	$ -	$ 9	$ -	$ -	$ -	$ -	$ 100

Source: for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) - [illegible]
[illegible]
[illegible] - [illegible]

8/11/69

Revised 9/17

50198 9310

METRO MARKETS

50198 9311

ATLANTA, GEORGIA

Atlanta, which is the sixteenth largest Negro market in the United States, is a "new kind of city", and one of the most rapidly expanding cities in the nation. The Negro market grows with its expansion.

POPULATION

The total non-white population in metropolitan Atlanta is 277,600, which represents 22 percent of the total population. In the City of Atlanta, an estimated 236,072 blacks make up 46 percent of the total city population, an increase of 5.2 percent since 1960. As is the case in most metropolitan centers, a large proportion of the non-white population lives in the central city. Long range trends indicate a continuous and substantial increase in the non-white share of the City of Atlanta.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	22.6	25.1
Food prepared at home	16.6	19.1
Food away from home	6.0	6.0
Tobacco	1.6	2.5
Alcoholic Beverages	1.0	1.4
Housing, Total	30.0	29.5
Shelter	12.5	12.4
Rented Dwelling	4.6	10.2
Owned Dwelling	7.3	2.1
Other Shelter	.6	.1
Fuel, light, refrigeration, water	4.0	5.1
Household operations	7.1	6.3
House furnishings and equipment	6.0	5.7
Clothing, cloth, materials, services	10.7	13.3
Personal care	3.0	4.5
Medical care	6.4	3.6
Recreation	4.1	2.7
Reading	.9	.8
Education	1.1	1.4
Transportation	16.7	13.8
Automobile	15.4	10.5
Other travel and transportation	1.2	3.3
Other expenditures	2.0	1.4

(Over)

INCOME

The average non-white household income in metropolitan Atlanta is $6,700. In Atlanta, 45,100 households are headed by males, with 20,100 households headed by females. A total percentage income breakdown for 65,200 households is as follows:

Under $3,000	50.1 %	$10,000 - 14,999	1.5 %
$3,000 - 4,999	25.7 %	$15,000 - 24,999	.3 %
$5,000 - 6,999	12.8 %	$25,000 and Over	2.9 %
$7,000 - 9,999	6.7 %		

MEDIA

Radio Station WAOK
110 Edgewood Avenue, N. E.
Atlanta, Georgia 30303

Radio Station WERD
330 Auburn Avenue, N. E.
Atlanta, Georgia 30303

Radio Station WIGO
Georgian Terrace Hotel
Atlanta, Georgia 30383

The Atlanta Daily World
210 Auburn Avenue, N. E.
Atlanta, Georgia 30303

The Atlanta Inquirer
787 Parsons Street, S. W.
Post Office Box 9215
Atlanta, Georgia 30314

MARKETING CLIMATE

The marketing climate in Atlanta is considered good. More companies are now using Negro-oriented media, communications, and sales techniques to reach the black consumer than ever before. Atlanta is believed to have more Negro home ownership than any other city of comparable size. Atlanta has an "Operation Breadbasket", which is the economic arm of the Atlanta-headquartered Southern Christian Leadership Conference. Many companies now have Negro sales representatives and employees. Atlanta has a good and sizable black business community, and it continues its growth. Widening employment opportunities assure the Negro community's continuing economic growth.

*

Sources: See Appendix

*

BIRMINGHAM, ALABAMA

Birmingham is the nation's seventeenth largest Negro market. It is, moreover, one of the largest and fastest expanding markets in the South.

POPULATION

In metropolitan Birmingham, the Negro population is estimated at 239,000, comprising approximately 28.5 percent of the total metropolitan population. In the City of Birmingham, there are 148,072 blacks, accounting for nearly 40 percent of the city's population. There are an estimated 77,784 Negro households in the metropolitan area, 44 percent of which are owned by the inhabitants.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	22.4	27.1
Food prepared at home	17.1	30.1
Food away from home	16.4	8.6
Tobacco	2.2	2.7
Alcoholic Beverages	2.0	2.5
Housing, Total	32.1	28.6
Shelter	13.1	13.9
Rented Dwelling	7.2	12.7
Owned Dwelling	7.7	5.2
Other Shelter	.7	.2
Fuel, light, refrigeration, water	3.9	6.1
Household operations	8.6	7.9
House furnishings and equipment	5.9	5.9
Clothing, cloth, materials, services	9.6	15.9
Personal care	4.1	4.9
Medical care	7.6	3.5
Recreation	4.2	1.5
Reading	.8	.6
Education	2.1	2.7
Transportation	17.7	17.0
Automobile	14.3	11.6
Other travel and transportation	1.5	4.8
Other expenditures	3.1	2.1

(Over)

INCOME

Estimates show the Negro medium family income in the Birmingham area to have almost doubled since 1950, while the number of black families earning $4,000. or more annually has increased over 500 percent during the same period. Negroes had an effective buying income of more than $655 million during 1968. Estimated percentages of total income of households is as follows:

Under $2,000	30.1 %
$2,000 - 3,999	33.2 %
$4,000 - 6,999	31.9 %
$7,000 and Over	4.8 %

MEDIA

Radio Station WENN
P. O. Box 1469
Birmingham, Alabama 35201

Radio Station WJLD
109 North 19th Street
Birmingham, Alabama 35203

Birmingham World
P. O. Box 1968
Birmingham, Alabama 35203

Birmingham Times
P. O. Box 1712
Birmingham, Alabama 35201

Birmingham Mirror
1517 North Fourth Avenue
Birmingham, Alabama

MARKETING CLIMATE

The climate for market development in Birmingham is considered most favorable. Progress in employment and in other areas, including the appointment of the first Negro city councilman, has had good effect on the black community. Half of the Negro families in Birmingham own their own homes. Over 46 percent of black families own automobiles. They spend an average 80 percent of their income on consumer commodities and services. There is a "wait and see" attitude on future progress, but this does not seem to be affecting marketing progress.

*

Sources: See Appendix

*

CHICAGO, ILLINOIS

Chicago ranks second only to New York City in terms of the Negro market. It far outranks Los Angeles in this respect, although the latter is reported to have supplanted Chicago as the United States' second largest city in terms of general population. It continues to be a pace-setter in the black market, whose effects are felt throughout the country.

POPULATION

Chicago currently has an estimated black population of 1.02 millions; this represents 30.2 percent of the total population within the city limits. Of a total metropolitan area population of more than 7.3 millions, Negroes represent 17.3 percent. Although the City of Chicago has had an overall population decrease of 2 percent since 1960, the Negro population has increased 6.6 percent during the same period.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	24.7	20.8
Food prepared at home	20.0	18.5
Food away from home	4.7	2.3
Tobacco	1.6	1.8
Alcoholic Beverages	1.8	1.6
Housing, Total	30.1	32.6
Shelter	15.6	19.4
Rented Dwelling	7.0	18.7
Owned Dwelling	7.8	.6
Other Shelter	.8	.1
Fuel, light, refrigeration, water	4.1	2.1
Household operations	5.5	6.2
House furnishings and equipment	4.9	4.9
Clothing, cloth, materials, services	9.8	14.9
Personal care	2.8	4.3
Medical care	6.4	3.5
Recreation	3.7	3.9
Reading	.9	.7
Education	1.1	.1
Transportation	15.3	14.7
Automobile	13.0	11.8
Other travel and transportation	2.3	2.9
Other expenditures	1.7	1.2

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(Over)

INCOME

In the Chicago Negro community, the average family income, before taxes, is $5,750 per year. This represents a total annual before taxes income of 1.4 billion dollars. 26,800 black households have family incomes of between $10,000 and $15,000 per year; 3.2 percent of all Negro households have income over $15,000 annually. The percentage distribution of Negro family income, before taxes, is as follows:

Under $3,000	18.3 %	$ 8,000 - 9,999	15.1 %
$3,000 - 4,999	24.7 %	$10,000 -14,999	10.8 %
$5,000 - 7,999	27.9 %	$15,000 and Over	3.2 %

MEDIA

Radio Station WBEE
75 East Wacker Drive
Chicago, Illinois 60601

Radio Station WGRT
LaSalle-Wacker Building
Chicago, Illinois 60601

Radio Station WMPP
Lincoln Hwy. at Ellis Avenue
East Chicago Heights, Illinois 60411

Radio Station WVON
3350 South Kedzie
Chicago, Illinois 60623

Chicago Daily Defender
2400 South Michigan Avenue
Chicago, Illinois 60616
(Daily and Weekend)

Chicago Courier
417 East 47th Street
Chicago, Illinois 60653

New Crusader
6429 South Parkway
Chicago, Illinois 60637

MARKETING CLIMATE

The growing affluence of Chicago's Negro market is reflected in the fact that before 1960, there were only five black families living in 59 predominantly white suburbs; today, 543 black families are living in these same suburbs, and most of them are buying homes. This trend will continue as employment increases through plant relocations, job openings, and with more lending institutions willing to lend money to Negroes. At present, an estimated 70,000 Negro families are able to afford suburban homes, and will make this move as housing opportunities open up. The Negro middle class continues to expand. Chicago is the home of "Operation Breadbasket", economic arm of the Southern Christian Leadership Conference, which continues to use techniques of the boycott to achieve employment and black business expansion. Super market chains are upgrading Negroes to management and sub-management positions Delivery trucks are either integrated or have black drivers in predominantly black neighborhoods. Media executives feel that the attitude toward the Negro market is improving among marketing and advertising executives. Most of the downtown stores are now using Negro-oriented media and promotions. 45.5 percent of heads of households have at least high school education, with 18.5 percent of them having one or more years of college. In Chicago, 25.5 per-

...Continued...

CINCINNATI, OHIO

Cincinnati is the nation's nineteenth largest Negro market. As a market, is is felt to be considerably better than other cities of comparable size.

POPULATION

At present, the metropolitan area population of Cincinnati is 13.2 percent black, numbering 179,200 Negro residents. The Negro population of the City of Cincinnati is an estimated 150,300, comprising 28.5 percent of the total city population. There are an estimated 47,800 black homes in metropolitan Cincinnati.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	25.6	27.6
Food prepared at home	20.2	21.7
Food away from home	5.4	5.9
Tobacco	2.2	2.1
Alcoholic Beverages	2.8	3.2
Housing, Total	27.7	30.6
Shelter	12.9	16.3
Rented Dwelling	5.4	12.7
Owned Dwelling	7.1	3.4
Other Shelter	.5	.1
Fuel, light, refrigeration, water	4.0	4.1
Household operations	5.5	5.3
House furnishings and equipment	5.2	5.0
Clothing, cloth, materials, services	8.6	12.0
Personal care	2.6	3.1
Medical care	6.1	3.4
Recreation	4.2	3.6
Reading	.9	.6
Education	.6	.0
Transportation	16.4	12.8
Automobile	14.7	10.3
Other travel and transportation	1.7	2.5
Other expenditures	2.3	.9

(Over)

50198 9318

INCOME

The estimated median Negro family income is $5,925.00 per year. In the metropolitan area, blacks have an annual spendable income of $288-millions. A percentage breakdown of estimated individual annual income is as follows:

Under $3,000	34.8 %
$3,000 - 4,999	33.2 %
$5,000 - 7,999	21.6 %
$8,000 - 9,999	3.5 %
$10,000 and Over	5.7 %

MEDIA

Radio Station WCIN
106 Glenwood Avenue
Cincinnati, Ohio 45217

Call and Post
Post Office Box 867
Cincinnati, Ohio

Cincinnati Herald
863 Lincoln Avenue
Cincinnati, Ohio 45206

MARKETING CLIMATE

The climate for market development in Cincinnati is considered very good. The stable socio-economic atmosphere of Cincinnati, and the relatively high median income, together with the low unemployment rate, are reflected in an increasing interest in, and development of, the Negro market. The city has an "Operation Breadbasket" program that has focused even more attention on the Negro market. An estimated 39.3 percent of black families own their own homes; of these 67.2 percent are valued at $10,000 or more. Over 49 percent of those employed are in skilled, white collar and professional occupations.

*

Sources: See Appendix

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50198 9319

CLEVELAND, OHIO

Cleveland is now the nation's fourteenth largest Negro market. Its size, and the emphatic new "Cleveland Now!" program, of which a prime component is the upgrading of the black community, continue to make Cleveland an important market with exciting potential.

POPULATION

The metropolitan population of Cleveland is 86 percent white and 14 percent Negro; there are approximately 286,636 Negroes in the metropolitan area. In the City of Cleveland, there are an estimated 276,376 blacks, comprising 34.1 percent of the total city population. In April, 1940, there were 86,504 Negroes in Cleveland, representing 9.6 percent of the total population.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	23.6	26.6
Food prepared at home	18.9	24.8
Food away from home	4.7	1.8
Tobacco	1.6	2.3
Alcoholic Beverages	1.6	2.9
Housing, Total	29.2	31.4
Shelter	13.7	20.1
Rented Dwelling	3.5	19.1
Owned Dwelling	9.3	1.0
Other Shelter	.8	.0
Fuel, light, refrigeration, water	3.9	3.2
Household operations	5.7	5.3
House furnishings and equipment	5.8	2.8
Clothing, cloth, materials, services	11.2	11.8
Personal care	2.4	4.0
Medical care	6.0	4.3
Recreation	4.5	4.7
Reading	1.0	.9
Education	1.3	1.5
Transportation	14.1	9.0
Automobile	12.0	6.9
Other travel and transportation	2.1	2.1
Other expenditures	3.5	.6

(Over)

INCOME

In the 1965 Special Census of Cleveland, the median family income for blacks was reported at $5,489 per year. An estimated percentage breakdown of family income is as follows:

Under $2,500	20.3%	$ 7,000 - 9,999	10.9%
$2,500 - 3,999	18.7%	$10,000 and over	1.6%
$4,000 - 6,999	48.5%		

MEDIA

Radio Station WABQ
2323 Chester Avenue
Cleveland, Ohio 44114

Radio Station WJMO
11821 Euclid Avenue
Cleveland, Ohio 44106

The Call and Post
Post Office Box 6237
Cleveland, Ohio 44101

MARKETING CLIMATE

The marketing climate is considered fair in Cleveland. There have been civil distrubances; there is an active "Operation Breadbasket", and there are continuing problems. Cleveland, however, boasts the first "big city" Negro Mayor - Carl B. Stokes, and a Representative in Congress for the first time - Louis Stokes. In 1960, 98.2 percent of all non-whites in the Greater Cleveland area lived in restricted areas on the East Side. By 1965, this number had been reduced to 80 percent, and the trend is continuing. The percentage of owner-occupied units in 1965 was 16.2. Cleveland business and industry is making a determined drive to continue opening the job opportunities to Negroes, which should reflect itself in continuing gains for black income.

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Sources: See Appendix

*

DALLAS/FORT WORTH, TEXAS

Metropolitan Dallas/Fort Worth is now the nation's ninth largest Negro market. Illustrating its growth, this market was fifteenth largest in 1960.

POPULATION

The present metropolitan population of the Dallas/Fort Worth area is 83 percent white and 17 percent Negro. Negroes now number an estimated 358,428 in the metropolitan area. As of January 1, 1968, Dallas had a black population of more than 187,800, and Fort Worth, a 69,100 Negro population. There are an estimated 61,000 black households in the area.

Percent Distribution expenditures for current consumption (Dallas):

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	22.0	20.6
Food prepared at home	16.6	16.6
Food away from home	5.4	4.0
Tobacco	2.1	2.9
Alcoholic Beverages	1.0	.7
Housing, Total	29.6	34.6
Shelter	13.1	19.6
Rented Dwelling	5.1	10.3
Owned Dwelling	7.4	9.3
Other Shelter	.7	.0
Fuel, light, frigeration, water	4.0	4.0
Household operations	6.3	5.5
House furnishings and equipment	6.1	5.5
Clothing, cloth, materials, services	10.5	12.0
Personal Care	3.2	3.9
Medical Care	6.7	6.2
Recreation	4.4	2.8
Reading	.8	.6
Education	1.2	.2
Transportation	16.8	13.4
Automobile	15.3	11.6
Other transportation and travel	1.5	1.8
Other expenditures	1.5	2.0

50198 9322

(Over)

INCOME

The median income for non-whites in Dallas is $3,166. An estimated 17 percent of Negro families have incomes of more than $5,000 per year. For the estimated 45,300 black households in Dallas County, the percentage distribution of income is as follows:

Under $3,000	52.8 %	$ 7,000 - 9,999	4.6 %
$3,000 - 4,999	30.2 %	$10,000 - 14,999	1.6 %
$5,000 - 6,999	10.0 %	$15,000 and Over	0.8 %

MEDIA

Radio Station KNOK
P. O. Box 432
Dallas, Texas 75215

Radio Station KNOK
P. O. Box 7116
Fort Worth, Texas 76111

The Post Tribune
3313 Oakland Street
Dallas, Texas 75215

The Dallas Express
2600 Flora
Dallas, Texas 75204

The Fort Worth Mind
805 Bryan Street
Fort Worth, Texas 76104

In Sepia Dallas
2700 Grand Avenue
Dallas, Texas 75215

MARKETING CLIMATE

High levels of economic activity in recent years, and the removal of certain discriminatory barriers, encouraged government, industry and commerce to hire minorities in unparalleled numbers. Minority group federal employment in Dallas, according to figures released in 1967-68, increased from 13.6 percent to 15.4 percent during a three year period. Dallas' black community spends an estimated $143 millions annually for goods and services. Approximately 50 percent of black homes in Dallas are owner-occupied. The current marketing climate in the Dallas-Fort Worth Negro community is considered good. More and more emphasis is being placed on community relations in local Governments. Both cities have black representation on City Councils. Employment outlook and increased earnings are most favorable.

*

Sources: See Appendix

DETROIT, MICHIGAN

Detroit is the fourth largest Negro market in the United States. Compared with other cities, Detroit has a relatively high concentration of blacks. In fact, it has proportionately more Negroes than most other Northern cities. In Detroit, moreover, blacks have become even more concentrated in the "inner city".

POPULATION

There are an estimated 738,000 Negroes in the Detroit metropolitan area, comprising 17.9 percent of the total metropolitan area population. There are an estimated 196,000 households of black families in the metropolitan area. In the City of Detroit, blacks comprise 41 percent of the total city population, with an estimated 600,000 Negroes. In 1940, there were 170,766 Negroes in the City of Detroit; this represents an increase of more than 3[illegible] percent in the last two decades.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	22.6	23.6
Food prepared at home	18.4	19.3
Food away from home	4.2	4.4
Tobacco	2.1	1.9
Alcoholic Beverages	1.8	2.4
Housing, Total	28.9	34.2
Shelter	13.3	16.0
Rented Dwelling	3.5	9.4
Owned Dwelling	9.2	6.6
Other Shelter	.6	.0
Fuel, light, refrigeration, water	4.4	5.9
Household operations	5.5	5.0
House furnishings and equipment	5.6	7.3
Clothing, cloth, materials, services	10.5	11.4
Personal care	2.7	3.8
Medical care	6.3	4.1
Recreation	3.6	3.8
Reading	1.0	.9
Education	.9	1.1
Transportation	17.0	10.4
Automobile	15.6	7.7
Other travel and transportation	1.4	2.7
Other expenditures	2.5	2.4

50198 9324

(Over)

INCOME

In Detroit, the 1967 estimate of median family income for Negroes was $6,540 per year. Effective buying income is estimated at over $800-millions. Fifty-nine percent of all black households have incomes of more than $5,000 annually, with forty-one percent earning between $5 and $8-thousands, and 18.2 percent earning more than $8,000. A percentage breakdown of family incomes is as follows:

Under $3,000	19.0 %	$10,000 - 14,999	6.1 %
$3,000 - 4,999	19.3 %	$15,000 - 24,999	1.1 %
$5,000 - 7,999	40.5 %	$25,000 and Over	.5 %
$8,000 - 9,999	10.5 %	No Data Available	3.0 %

MEDIA

Radio Station WJLB
3100 David Broderick Tower
Detroit, Michigan 48226

Radio Station WCHB
32790 Henry Ruff Road
Inkster, Michigan 48141

Radio Station WCHD-FM
278 East Forest
Inkster, Michigan 48201

The Michigan Chronicle
479 Ledyard
Detroit, Michigan

The Detroit Courier
1111 Webb Street
Detroit, Michigan 48206

MARKETING CLIMATE

The present marketing climate in Detroit is considered very good. 66.2 percent of the total income of Negro households is spent in retail stores, representing approximately $587-millions in retail sales. Although the 1967 Detroit civil disturbances did cause some concern in the business community, with some backlash, a very positive climate exists today. The dialogue between business, industry and the black community is at an all-time high and the overall situation shows marked improvement. Interest by advertisers and agencies continues to show strength not previously felt in the Detroit Negro market, which is considered one of the best in the United States. Examples are the gains in two areas: in 1960, Negroes spent an estimated $132-millions on food, and in 1967 $245-millions; in 1960, Negroes spent an estimated 131-millions on housing, and in 1967, this had also increased to $245-millions.

*

Sources: See Appendix

*

HOUSTON, TEXAS

Houston has jumped in position to the eighth largest Negro market in the United States, both in terms of metropolitan area and city populations. This reflects the general growth of the area.

POPULATION

There are an estimated 378,325 Negroes living in the Houston metropolitan area, comprising 22.4 percent of the total metropolitan population. Blacks number an estimated 368,934 in the City of Houston, representing 20.4 percent of the total city population. There are approximately 94,581 Negro households in present-day Houston.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.00
Food, Total	20.9	22.5
Food prepared at home	16.1	17.3
Food away from home	4.8	5.2
Tobacco	1.7	2.3
Alcoholic Beverages	1.3	2.1
Housing, Total	29.9	32.5
Shelter	13.4	16.5
Rented Dwelling	4.1	12.0
Owned Dwelling	8.4	4.3
Other Shelter	.8	.2
Fuel, light, refrigeration, water	4.2	4.7
Household operations	6.9	7.4
House furnishings and equipment	5.3	3.8
Clothing, cloth, materials, services	10.2	11.7
Personal care	3.0	4.4
Medical care	6.5	6.5
Recreation	4.2	2.8
Reading	.7	.6
Education	.9	.8
Transportation	17.7	12.5
Automobile	17.0	10.1
Other travel and transportation	.7	2.5
Other expenditures	2.9	1.2

50198 9326

(Over)

INCOME

The Negro median family income in Houston is $4,821 annually, representing a total spendable family income of more than $455-millions per year. The percentage distribution of black income is as follows:

Under $5,000	64 %
$ 5,000 - 9,999	32 %
Over $10,000	4 %

MEDIA

Radio Station KCOH
5011 Almeda Street
Houston, Texas 77004

Radio Station KYOK
613 Preston Avenue
Houston, Texas 77002

The Houston Informer
2418 Leeland Avenue
Houston, Texas 77003

The Forward Times
4411 Almeda Road
Houston, Texas 77004

MARKETING CLIMATE

The present climate for market development in Houston is considered good. Employment opportunities have helped to increase black income. In 1950, Negro family income was only $1700 per family per year; it is now nearing $5,000 per year. The petroleum and chemical industries are large employers of Negro labor, and other industries continue to provide opportunity. The Houston Negro market represents the "fourth largest total" market in Texas.

*

Sources: See Appendix

*

KANSAS CITY, MISSOURI

Metropolitan Kansas City is the twenty-first largest Negro market in the United States.

POPULATION

There are 156,736 blacks residing in the Kansas City metropolitan area, comprising 12 percent of the total metropolitan population. There are an estimated 145,800 Negores living within the city limits of Kansas City, representing 20 percent of the total city population.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	21.7	25.3
Food prepared at home	16.2	22.4
Food away from home	5.5	2.9
Tobacco	1.6	1.4
Alcoholic Beverages	1.4	1.8
Housing, Total	28.8	34.4
Shelter	13.9	13.9
Rented Dwelling	5.7	8.7
Owned Dwelling	7.2	5.3
Other Shelter	1.0	.0
Fuel, lights, refrigeration, water	4.0	7.1
Household operations	5.4	6.8
House furnishings and equipment	5.2	6.5
Clothing, cloth, materials, services	9.2	12.8
Personal Care	2.9	4.2
Medical Care	6.5	4.4
Recreation	4.1	4.5
Education	1.3	.5
Reading	.7	.4
Transportation	19.1	10.1
Automobile	17.3	7.8
Other travel and transportation	1.8	2.3
Other expenditures	2.7	.4

(Over)

INCOME

The average Negro family income in Kansas City is $4,600 per year. An estimated percentage breakdown of annual income of black families is as follows:

Under $2,500	27.6 %	$ 7,000 - 9,999	6.9 %
$2,500 - 3,999	20.3 %	$10,000 and Over	4.0 %
$4,000 - 6,999	41.2 %		

MEDIA

Radio Station KPRS
2301 Grand Avenue
Kansas City, Missouri 64108

The Kansas City Call
1715 East 18th Street
Kansas City, Missouri 64108

MARKETING CLIMATE

The climate for market development in Kansas City is considered good. In the area, unemployment among Negroes is one-half the national average. Within the city, black students make up 48 percent of the total school population. There are no economic withdrawal programs in the market, and relations seem to be improving between business and industry and the black community.

*

Sources: See Appendix

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LOS ANGELES, CALIFORNIA

Los Angeles is the sixth largest Negro market in the United States, and it continues to increase in population.

POPULATION

The Los Angeles metropolitan area population is 89.8 percent white and 10.2 percent Negro. Negroes number approximately 722,943 in the metropolitan area. In the City of Los Angeles, blacks, who number an estimated 533,600, represent 18.9 percent of the total city population. These figures represent percentage increases of 57 percent and 59.5 percent, respectively, since 1960.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	23.7	21.2
Food prepared at home	18.5	16.6
Food away from home	5.2	4.6
Tobacco	1.6	2.3
Alcoholic Beverages	1.7	4.2
Housing, Total	27.9	30.7
Shelter	14.0	13.9
Rented Dwelling	5.9	10.6
Owned Dwelling	7.7	3.3
Other Shelter	.4	.0
Fuel, light, refrigeration, water	3.0	2.3
Household operations	6.0	10.6
House furnishings and equipment	4.7	3.9
Clothing, cloth, materials, services	8.6	15.4
Personal care	2.5	3.4
Medical care	7.4	3.9
Recreation	4.5	5.3
Reading	.8	1.3
Education	.8	.4
Transportation	17.7	11.0
Automobile	16.4	9.8
Other travel and transportation	1.2	1.2
Other expenditures	2.9	.9

(Over)

INCOME

The average income per black family in the Los Angeles area is $6,448 annually. The percentage breakdown of family income is as follows:

Under $4,000	20 %	$10,000 - 11,999	20 %
$4,000 - 5,999	16 %	$12,000 - 14,999	20 %
$6,000 - 7,999	5 %	$15,000 and Over	9 %
$8,000 - 9,999	10 %		

MEDIA

Radio Station KGFJ
4550 Melrose Avenue
Los Angeles, California 90029

Los Angeles Sentinel
1112 East 43rd Street
Los Angeles, California 90011

MARKETING CLIMATE

The marketing climate in Los Angeles is considered very good, and continues to improve. Over 65 percent of family adults have at least a high school education or better, with 40 percent of these having some college training. Sixty-six percent of Negro households have more than one person employed. Five percent of all workers have additional part-time employment. Fifty-five percent of Los Angeles' black families own their own homes, with an average home value of $18,900. Seventy-seven percent of black households own automobiles, with eighteen percent owning two or more. Fifty-one percent of Negro families have charge accounts, with nearly all of them in current use. Most major companies have Negro sales and marketing representatives in Los Angeles. Sixty-two percent of employed black women are either professionals or government employees.

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Sources: See Appendix

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MEMPHIS, TENNESSEE

Memphis is the fifteenth largest Negro market in the United States; it is the key market to the populous black mid-South.

POPULATION

The black population of metropolitan Memphis is presently 280,176; they reside in some 80,004 households. In the City of Memphis, according to a 1967 Special Census, there are 213,037 Negores, comprising 39.7 percent of the total city population.

NEGRO SPENDING (By Categories)

Food	$125,081,214.
Clothing	$ 48,189,929.
Housing	$ 35,433,772.
Furnishings and Equipment	$ 27,638,343.
Fuel and Light	$ 18,779,899.
Automobile Expenses	$ 18,425,561.
Personal Care	$ 13,110,495.
Household Operation	$ 13,464,833.
Recreation	$ 14,527,846
Medical Care	$ 12,047,482.
Tobacco	$ 9,212,781.
Miscellaneous	$ 18,425,561.

INCOME

The median family income for Negroes in the metropolitan Memphis area is $4,429.00 per year. The total spendable income for black families is estimated at more than $355,000,000.

MEDIA

Radio Station WDIA
Post Office Box 12045
Memphis, Tennessee 38112

Radio Station WLOK
363 South Second Street
Memphis, Tennessee 38103

The Memphis World
546 Beale Avenue
Memphis, Tennessee 38103

The Tri-State Defender
236 Danny Thomas Boulevard
Memphis, Tennessee 38126

50198 9332

(Over)

 MEMPHIS

MARKETING CLIMATE

The market climate in the metropolitan Memphis area is considered good. There are no current company boycotts extant in the market. What is happening in the market today is a more concentrated effort on the part of all types of business both to increase the percentage of their black employees in relation to total personnel, and to upgrade those jobs currently held by Negroes. This activity should insure a continuance of the growth and of the importance of the black segment of the Memphis community.

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Sources: See Appendix

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MILWAUKEE, WISCONSIN

Milwaukee is the twenty-fourth largest Negro market in the United States.

POPULATION

At present, the metropolitan population of Milwaukee is 93.1 percent white, and 6.9 percent Negro. Within the City of Milwaukee, however, blacks make up 12.7 percent of the total city population. There are approximately over 100,600 Negroes in the metropolitan area, living in some 25,150 households.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	23.4	25.1
Food prepared at home	18.1	21.1
Food away from home	5.3	4.0
Tobacco	1.5	1.6
Alcoholic Beverages	2.5	1.7
Housing, Total	29.4	32.2
Shelter	14.6	16.3
Rented Dwelling	5.1	14.9
Owned Dwelling	8.8	1.4
Other Shelter	.7	.0
Fuel, light, refrigeration, water	4.6	5.3
Household operations	5.0	5.9
House furnishings and equipment	5.0	4.7
Clothing, cloth, materials, services	9.6	15.5
Personal Care	2.6	4.0
Medical Care	5.8	3.6
Recreation	4.1	3.1
Reading	1.0	.7
Education	1.9	.9
Transportation	16.0	10.3
Automobile	14.7	8.6
Other travel and transportation	1.3	1.7
Other expenditures	2.1	1.2

(Over)

INCOME

The projected average of spendable income per black family in the Milwaukee area is $6,800. to $7,200. per year. Consumer Spendable Income for all black families should be in the $170-millions to $200-millions range.

MEDIA

Radio Station WNOV
208 East Wisconsin Avenue
Milwaukee, Wisconsin 53202

Radio Station WAWA
12700 West Bluemond Road
Elm Grove, Wisconsin 53122

The Milwaukee Courier
3866 North Teutonia Avenue
Milwaukee, Wisconsin 53206

Milwaukee Star
2334 North Third Street
Milwaukee, Wisconsin 53212

MARKETING CLIMATE

Marketing conditions in Milwaukee are considered excellent. The business community is starting aggressively to show interest in black trade. The community is involved in many self-determination business projects, including a black-owned shopping center. Income and employment are relatively high in soft lines and manufacturing trades. Lines of distribution to the black community are clearly drawn for many consumer products and services, and product flow is easily determined.

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Sources: See Appendix

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NEW ORLEANS, LOUISIANA

New Orleans is the tenth largest Negro market in the United States. It promises to be one of several of the nation's largest cities which will have black population majorities within the next decade or two.

POPULATION

In metropolitan New Orleans, there are 339,500 Negroes, living in approximately 84,500 households. In the City of New Orleans, blacks comprise 41.6 percent of the total city population, numbering 274,500.

NEGRO SPENDING (By Categories)

Food	$145,417,533.
Clothing	$ 56,024,855.
Housing	$ 41,194,769.
Furnishings and Equipment	$ 32,131,919.
Automobile Expense	$ 21,421,280.
Fuel and Light	$ 21,833,337.
Household Operation	$ 15,654,012.
Personal Care	$ 15,242,064.
Medical Care	$ 14,006,221.
Recreation and Travel	$ 16,889,855.
Tobacco	$ 10,710,640.
Miscellaneous	$ 21,421,280.

INCOME

The median family income for blacks in the New Orleans metropolitan area is $4,497.00 annually. Negroes have a total spendable family income of $411,947,685.

MEDIA

Radio Station WYLD
Post Office Box 19124
2906 Tulane
New Orleans La. 70119

Radio Station WBOK
505 Baronne Street
New Orleans, La. 70113

Louisiana Weekly
640 South Rampart Street
New Orleans, La.

50198 9336

(Over)

MARKETING CLIMATE

The climate for market development is considered most favorable in the New Orleans area. With the general growth and improvement which has taken place in New Orleans in the past few years, there has also been upgrading in the black community. Downtown stores have begun to make approaches to the market, reflecting the increasing importance of the central city's black population. New Orleans has long had one of the most affluent business communities of any black community in the United States, particularly in the insurance field. Home ownership and auto ownership are both good. With a membership of more than 3,000, the General Longshore Workers Union, Local 1419, is considered the largest Negro union in the nation. In all, some 30,000 Negroes in the New Orleans area are members of labor unions.

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Sources: See Appendix

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NEWARK, NEW JERSEY

Newark is the thirteenth largest Negro market in the nation. It is one of the few cities in the United States to have a Negro population definitely in the majority.

POPULATION

Newark has 209,916 Negroes within the city limits, comprising 52.2 percent of the total city population. In the metropolitan area, there are approximately 293,355 blacks, representing 42.3 percent of the total population. There are an estimated 52,229 black households in Newark. In 1965, the Negro percentage of the city population was 47 percent; this reflects the rapidity with which this market is growing. 21.7 percent of all Negro residents over the age of 16 have resided in Newark less than five years.

Percent Distribution expenditures for current consumption:

NORTHEASTERN NEW JERSEY	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	25.5	22.3
Food prepared at home	19.8	18.7
Food away from home	5.7	3.6
Tobacco	1.7	1.7
Alcoholic Beverages	1.9	3.3
Housing, Total	29.9	31.1
Shelter	15.2	15.2
Rented Dwelling	5.7	11.7
Owned Dwelling	8.6	2.9
Other Shelter	.9	.6
Fuel, light, refrigeration, water	4.4	5.2
Household operations	5.8	6.5
House furnishings and equipment	4.3	4.2
Clothing, cloth, materials, services	10.7	14.4
Personal Care	2.7	3.5
Medical Care	6.0	4.1
Recreation	3.6	4.0
Reading	.9	1.1
Education	1.2	.1
Transportation	14.2	13.4
Automobile	12.6	11.3
Other travel and transportation	1.6	2.1
Other Expenditures	1.6	1.0

(Over)

50198 9338

INCOME

Median income in households where males are the head is $6,892 per year. In households where women are the head, the figure drops to $3,120 per year. Males head 65 percent of the black households in Newark, with females heading the remaining 35 percent. An estimated percentage breakdown of family income is as follows:

Under $3,000	19.5%
$3,000 - 4,999	22.8%
$5,000 - 6,999	21.5%
$7,000 - 9,999	21.8%
$10,000 - 14,000	11.3%
$15,000 - and over	3.1%

MEDIA

Radio Station WNJR
Post Office Box 1258
Newark, New Jersey 07101

New Jersey Afro-American
190 Clinton Avenue
Newark, New Jersey 07108

MARKETING CLIMATE

The marketing climate in Newark is considered good. Since the civil disturbances of 1965, the business community of Newark has instituted many programs that have resulted in increased employment and the race relations climate has shown marked improvement. Strong efforts are being made to help Negroes get into business, and to become a more important part of the city's economy.

*

Sources: See Appendix

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NEW YORK, NEW YORK

Metropolitan New York remains the nation's largest Negro market, and, as such, is the prime market for sales of products and services.

POPULATION

There are 1,460,700 Negroes in the New York metropolitan area (the five boroughs of New York City, Westchester, Nassau, Suffolk and Rockland counties. In New York City, there are 1,294,400 blacks, making up approximately 14.7 percent of the total city population. Within two of the five boroughs of New York City, blacks make up a large percentage of the total population: in Manhattan they comprise 24.6 percent of the population, and in Brooklyn they represent 23 percent of the population.

Percent Distribution expenditures for current cinsumption:

NEW YORK	WHITE	NEGRO
Expenditues for current consumption	100.0	100.0
Food, Total	26.5	26.7
Food prepared at home	20.3	20.7
Food away from home	6.1	6.1
Tobacco	1.5	2.2
Alcoholic Beverages	1.7	3.4
Housing, Total	31.0	32.7
Shelter	16.0	17.0
Rented Dwelling	9.1	14.6
Owned Dwelling	5.6	2.3
Other Shelter	1.3	.1
Fuel, light, refrigeration, water	3.3	2.7
Household operations	6.6	7.0
House furnishings and equipment	5.0	6.0
Clothing, cloth, materials, services	11.0	14.1
Personal Care	2.4	3.1
Medical Care	6.9	3.2
Recreation	3.9	3.8
Reading	1.0	1.3
Education	1.0	.5
Transportation	11.0	7.0
Automobiles	8.4	4.3
Other travel and transportation	2.6	2.7
Other expenditures	2.1	2.1

(Over)

INCOME

In metropolitan New York, the median household income for black households headed by males is $5,252.00 per year; the median income in black households headed by women is $3,817.00 per year. A percentage breakdown of income in each of these categories is as follows:

HOUSEHOLDS HEADED BY MALES	
$2,080 or less	.7 %
$2,080 - 2,808	2.7 %
$2,860 - 3,588	4.1 %
$3,640 - 4,368	13.0 %
$4,420 - 5,148	22.5 %
$5,200 - 6,448	22.7 %
$6,500 - 7,748	13.6 %
$7,800 and Over	8.2 %

HOUSEHOLDS HEADED BY FEMALES	
$2,080 or less	8.0 %
$2,080 - 2,808	14.4 %
$2,860 - 3,588	21.6 %
$3,640 - 4,368	25.2 %
$4,420 - 5,148	16.0 %
$5,200 - 6,448	11.2 %
$6,500 and Over	3.6 %

MEDIA

Radio Station WLIB
310 Lenox Avenue
New York, New York 10027

Radio Station WWRL
Box 1600, Woodside Station
41-30 58th Street
Queens, New York 11377

The New York Courier
315 West 125th Street
New York, New York 10027

The Amsterdam News
2340 Eighth Avenue
New York, New York 10027

The Queens Voice
170-11 Hillside Avenue
Jamaica, New York

The Westchester County Press
585 Warburton Avenue
Hastings-on-Hudson, New York

MARKETING CLIMATE

The marketing climate in New York is considered very good. 22.7 percent of all males heading households earn more than $100 per week, with 8.2 percent of these earning $150 a week and up. Most companies have Negro sales representatives working this territory, and this seems to be a trend in non-traditional lines (tobacco, liquor and beer companies were the pioneers in this area) which increases with the continuing growth of the market. Boycott activity in the New York area is spotty. There is a consumer education council which is seeking to help the community to overcome shoddy merchandising practices. 42.5 percent of families have savings accounts. 35 percent of the families take extended vacations. Some 89 percent of the families shop in supermarkets, and 32 percent have department store charge accounts.

NORFOLK, VIRGINIA

Norfolk and its surrounding area, including Portsmouth, Chesapeake and Virginia Beach, comprise the twentieth largest Negro market in the United States.

POPULATION

At present Norfolk's metropolitan population is 75.5 percent white and 24.5 percent Negro. Blacks comprise 26.4 percent of the total Norfolk city population, and 34.7 percent of the population of the City of Portsmouth. In the metropolitan area there are some 163,433 Negroes, living in approximately 41,000 households.

INCOME

Norfolk was one city for which no income data was available at the time of publication. However, all signs tend to indicate a substantial increase in the median income for black families over 1960. Employment for both males and females is at an all-time high; although Negroes comprise 24.5 percent of the metropolitan area's population, they comprise 23 percent of the area's labor force. The average black family's income in 1960 was $3,460.00 per year.

MEDIA

Radio Station WRAP
Post Office Box 598
Norfolk, Virginia 23501

Radio Station WHIH
Post Office Box 2640
Norfolk, Virginia 23501

Norfolk Journal and Guide
719 East Olney Road
Norfolk, Virginia 23501

MARKETING CLIMATE

The climate for market development is considered excellent. Negro employment is good, and earnings have increased. Diversified industry, and the major naval installations, contribute to an improved Negro market. Urban renewal has improved conditions substantially, and new projects are still in the offing. 38 percent of all blacks have high school educations or better. Virginia State College at Norfolk has nearly 8,000 commuter-students. 38 percent of Negroes own their own homes, with a median house value of approximately $7,000. No major problems in marketing seem to exist

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(Over)

at this time, and there is no boycott activity.

*

Sources: See Appendix

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PHILADELPHIA, PENNSYLVANIA

Philadelphia is the nation's third largest Negro market. One of America's oldest cities, it is currently undergoing a period of rejuvenation and this is being keenly felt by the city's black population.

POPULATION

The metropolitan population of Philadelphia is currently 81 percent white and 19 percent non-white. There are an estimated 640,000 Negroes within the city, comprising 32 percent of the total city population. In Philadelphia's metropolitan area, there are 926,000 blacks, living in approximately 195,000 households. They represent 19 percent of the total metropolitan area population.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	25.6	28.9
Food prepared at home	20.3	22.2
Food away from home	5.3	6.7
Tobacco	1.9	2.1
Alcoholic Beverages	1.9	3.2
Housing, Total	27.5	32.5
Shelter	11.7	15.8
Rented Dwelling	3.9	10.8
Owned Dwelling	6.5	5.0
Other Shelter	1.3	.0
Fuel, light, refrigeration, water	4.6	5.0
Household operations	6.3	6.2
House furnishings and equipment	4.8	5.6
Clothing, cloth, materials, services	10.0	11.6
Personal Care	2.8	4.5
Medical Care	5.4	5.7
Recreation	4.2	1.9
Reading	1.0	1.2
Education	2.3	.5
Transportation	14.8	7.4
Automobile	13.3	3.5
Other travel and transportation	1.6	3.9
Other expenditures	2.6	.4

(Over)

INCOME

The median family income for black families in the Philadelphia area has been estimated at $5,248.00 annually. An estimated percentage breakdown of Negro income is as follows:

Under $4,000	30.6%
$4,000 - 6,999	59.2%
$7,000 - 9,999	6.4%
$10,000 and Over	3.8%

MEDIA

Radio Station WDAS
Belmont Avenue and Edgely Rd.
Philadelphia, Penna. 19131

Radio Station WHAT
3930-40 Conshohocken Avenue
Philadelphia, Penna. 19131

The Philadelphia Tribune
524 South 16th Street
Philadelphia, Penna. 19146

The Philadelphia Afro-American
427 South Broad Street
Philadelphia, Penna. 19147

MARKETING CLIMATE

The marketing climate is considered very good in Philadelphia. There is an affluent and growing middle class in the black community. There are no major boycotts going on in the market today, although this is a city in which the most successful such activity in recent years took place. There is a new shopping center - Progress Plaza - where stores are either black-owned or black-managed. Downtown stores are making determined efforts to attract central city's black population, using black male and female models in advertisements, Negro mannequins; and through other means. More companies are profitably utilizing localized follow up to national programs aimed at the Negro market.

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Sources: See Appendix

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PITTSBURGH, PENNSYLVANIA

The Greater Pittsburgh area is the nation's eighteenth largest Negro market, and is one which is rapidly growing in size.

POPULATION

At present the metropolitan area's population is 91 percent white and 9 percent Negro. There are an estimated 128,684 blacks within the city limits, comprising 20 percent of the total population. In Pittsburgh's metropolitan area, there is a black population of 184,600, residing in approximately 46,150 households.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	25.6	24.2
Food prepared at home	21.6	20.9
Food away from home	3.9	3.3
Tobacco	2.0	1.7
Alcoholic Beverages	1.9	1.8
Housing, Total	26.7	25.7
Shelter	12.3	12.7
Rented Dwelling	4.8	7.1
Owned Dwelling	6.8	5.4
Other Shelter	.7	.1
Fuel, light, refrigeration, water	4.8	5.0
Household operations	4.6	4.9
House furnishings and equipment	5.0	2.8
Clothing, cloth, materials, services	10.8	12.0
Personal care	2.7	3.8
Medical care	6.0	5.4
Recreation	3.8	6.5
Reading	.9	.7
Education	1.2	.0
Transportation	15.6	15.7
Automobile	13.7	13.0
Other travel and transportation	1.9	2.7
Other expenditures	2.6	2.3

(Over)

INCOME

Median income for black families in Pittsburgh is $5,177.00 per year. The estimated gross spendable income is $300-millions annually. An estimated percentage breakdown of Negro income is as follows:

Under $4,000.	49.4 %
$4,000 - 6,999	40.0 %
$7,000 - 9,999	6.4 %
$10,000 and Over	4.2 %

MEDIA

Radio Station WAMO
1811 Boulevard of the Allies
Pittsburgh, Penna. 15219

Radio Station WZUM
201 Ewing Road
Pittsburgh, Penna. 15205

The Pittsburgh Courier
Post Office Box 2939
Pittsburgh, Penna. 15230

MARKETING CLIMATE

The climate for market development in Pittsburgh is considered good. While some local merchants did not reopen following civil disturbances, the overall effect has been positive. Food, department and variety store advertising efforts to the Negro market have been increased, as has automobile dealer advertising. Among the black population there is a 44.7 percent home ownership, with 60 percent living in single dwelling units; four out of ten home owners are under age thirty-five. Negro self-help and poverty programs seem to be producing a favorable climate for black-oriented marketing efforts. Awareness of company responsibility and action is at high pitch in the black community, and far-sighted business leadership is making good headway.

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Sources: See Appendix

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RICHMOND, VIRGINIA

Richmond is now considered the twenty-third largest Negro market in the United States. It continues to be the hub city of the upper South, serving as the funnel for the highly active Washington-New York-Boston corridor.

POPULATION

The present Richmond metropolitan area population is 73.6 percent white and 26.4 percent black; this represents a slight increase in the distribution. Negroes are generally acknowledged to represent 50 to 52 percent of the total Richmond city population. This is an increase of 8 to 10 percent over the 1960 census figures, in distribution. There appears to have been a decrease in total black population since 1960; presently, there are an estimated 107,836 persons residing in 23,013 households.

INCOME

More than 26 percent of Negro families in the Richmond metropolitan area earn $5,000 or more per year. 3.3 percent earn in excess of $10,000 per year. It is estimated that blacks have in excess of $30-millions in savings, much of it in the black-owned Consolidated Bank and Trust Company.

MEDIA

Radio Station WANT
Third and Grace Streets
Richmond, Virginia 23219

Radio Station WENZ
111 North Fourth Street
Richmond, Virginia 23219

Richmond Afro-American
301 East Clay Street
Richmond, Virginia 23219

MARKETING CLIMATE

The climate for market development is currently considered very good, and improving. While Richmond represents a highly lucrative black market, it is also a highly sensitive and selective one. Black consumers question whether a business is for or against "the movement"; they are alert to the hiring of black employees on all levels, and respond to black-oriented advertising in black media.

Race relations are considered to be generally good and the atmosphere has been relatively tranquil; there have been no incidents that could be considered riots. There has been an increasing awareness of the black community's needs, and positive steps have been taken to begin to meet them.

(Over)

MARKETING CLIMATE (Continued)

Last Summer, for example, the Richmond Chamber of Commerce sponsored a job program for the disadvantaged. Ten of the city's banks, including Consolidated Bank and Trust, recently pooled $5-millions to make loans available to black businesses, in cooperation with the Small Business Administration.

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Sources: See Appendix

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ST. LOUIS, MISSOURI

St. Louis is the twelfth largest Negro market in the United States. This represents a drop in position for the "Gateway City" in its standing among Negro markets throughout the country. Howevever, this market has actually grown measurably in this decade, and its potential is excellent.

POPULATION

At present, the metropolitan population of St. Louis is 85 percent white and 15 percent Negro. Within the city limits, blacks constitute 37 percent of the total city population. The Negro population of metropolitan St. Louis is estimated to be 319,600; in the city there are approximately 300,000 Negroes. In East St. Louis, Illinois, on the opposite bank of the Mississippi River, there is an additional 40,000 black population.

Percent Distribution expenditures for current consumption

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	25.9	25.1
Food prepard at home	21.2	22.3
Food away from home	4.7	5.8
Tobacco	1.3	2.1
Alcoholic Beverages	1.5	2.4
Housing, Total	29.4	32.7
Shelter	12.4	16.8
Rented Dwelling	3.9	8.4
Owned Dwelling	7.9	8.5
Other Shelter	.6	.0
Fuel, light, refrigeration, water	5.2	7.2
Household Operations	6.2	4.9
House furnishings and equipment	5.3	3.8
Clothing, cloth, materials, services	10.3	9.6
Personal Care	2.7	3.6
Medical Care	6.9	4.9
Recreation	3.9	2.3
Reading	.7	.7
Education	1.0	.9
Transportation	14.6	11.4
Automobile	13.6	9.1
Other travel and transportation	1.1	2.3
Other expenditures	1.9	1.3

(Over)

INCOME

In metropolitan St. Louis, the non-white median income is $3,034.00 per year. Between 35-44 years of age, this figure increases to $3,715.00. An estimated percentage breakdown of black income is as follows:

Under $4,000.	47.1%
$4,000 - 6,999.	41.3%
$7,000 - 9,999.	6.5%
$10,000 and Over	5.1%

MEDIA

Radio Station KXLW
2735 Bompart
St. Louis, Missouri 63144

Radio Station KADI-FM
2735 Bompart
St. Louis, Missouri 63144

Radio Station KATZ
812 Olive Street.
St. Louis, Missouri 63101

The St. Louis Argus
4595 Easton Avenue
St. Louis, Missouri 63113

The St. Louis Sentinel
3000 Easton Avenue
St. Louis, Missouri 63106

The St. Louis American
3608 Cozens Street
St. Louis, Missouri 63113

MARKETING CLIMATE

The climate for market development in St. Louis is considered good. Income and opportunity are up but, as in other cities, so are tensions. St. Louis has a large middle-class black population. There is a move to the suburbs, but to existing housing. New sub-divisions are often all black. There have been more threats of boycotts than actual boycotts, but such threats are accomplishing the objective of more jobs for Negroes. The Negro newspaper, the St. Louis Argus, is the oldest black business venture in the State of Missouri; it has published every week since 1912. Efforts at minority business development are getting underway. St. Louis has its first black Congressman - William Clay. Local government employment of blacks is up. In general, the outlook is good.

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Sources: See Appendix

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SAN FRANCISCO/OAKLAND, CALIFORNIA

The metropolitan San Francisco-Oakland area is the nation's eleventh largest Negro market. It is the second largest black market on the West Coast, and it continues to expand rapidly.

POPULATION

At present the metropolitan Negro population, comprising the seven-county metropolitan area, stands at 332,745, much of it concentrated in Oakland which has a black population of 134,995, or 34.5 percent. San Francisco has 93,000 blacks, or 12.3 percent of that city's total population. Berkeley has 36,000 (30 percent); Richmond has 34,600 (30.3 percent); and the balance is in the remaining counties, which are beginning to show some growth. In San Mateo County, for example, there is a present Negro population of 19,840, which represents a 356 percent increase over 1960.

Percent Distribution expenditures for current consumption (San Francisco):

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	23.9	24.1
Food Prepared at Home	18.2	21.2
Food Away from Home	5.8	2.9
Tobacco	1.3	2.8
Alcoholic Beverages	2.4	1.1
Housing, Total	29.0	34.2
Shelter	14.5	18.2
Rented Dwelling	6.5	12.9
Owned Dwelling	7.1	5.3
Other Shelter	.9	.0
Fuel, light, refrigeration, water	2.9	3.2
Household Operations	6.2	5.5
House Furnishings and Equipment	5.3	7.3
Clothing, cloth, materials, services	9.0	11.5
Personal Care	2.5	5.2
Medical Care	6.9	7.2
Recreation	5.0	2.6
Reading	1.0	.6
Education	1.2	.4
Transportation	15.6	8.7
Automobile	13.4	7.5
Other Travel and Transportation	2.2	1.1
Other Expenditures	2.1	1.6

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(Over)

INCOME

The effective buying income of blacks in the metropolitan area in 1968 is estimated at $440,444,000. The median Negro family income in Oakland is $6,456., while in San Francisco this figure is set at $5,271. Of a total 49,131 black households, the percentage distribution of income is as follows:

Under $5,000	45.5 %	$10,000 - 14,999	10.7 %
$5,000 - 7,999	24.0 %	$15,000 and over	9.9 %
$8,000 - 9,999	9.9 %		

MEDIA

Radio Station KDIA
P. O. Box 8432
Oakland, California 94608

Radio Station KSOL
150 Eighth Street
San Francisco, California 94103

The Sun-Reporter
1366 Turk Street
San Francisco, California 94115

California Voice
814 - 27th Street
Oakland, California 94607

The Post
2973 Sacramento Street
Berkeley, California 94705

MARKETING CLIMATE

The marketing climate for the seven-county metropolitan area is considered very good. Black family income in the Bay Area is considered to be one of the best in the nation. Negroes are employed in a wide range of business and industry, and opportunities continue to grow. 43 percent of the Negro families own their own homes; 68 percent own an automobile; and, 51 percent have savings accounts. Negroes spend an estimated $317 millions in retail buying annually. Downtown stores in both Oakland and San Francisco are the prime areas for shopping by black families. Race relations, for the most part, have improved in the Bay Area, and local governments are working with black leadership to improve relations and to continue the current climate, which is favorable.

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Sources: See Appendix

WASHINGTON, DISTRICT OF COLUMBIA

Washington, D. C., the nation's capitol, is the fifth largest Negro market in the United States. Its designation as a prime market takes on added meaning because of the large number of Federal jobs, permanent and with good salaries, which are available. Further, Washington is perhaps unique among the nation's major cities in that blacks comprise an overwhelming majority of the city's total population.

POPULATION

The present black population of the District of Columbia (City of Washington) has passed the half million mark, with an additional estimated one to two hundred thousand comprising the total metropolitan area's black population. There are an estimated 725,895 Negroes in the metropolitan area, comprising approximately 27 percent of the total metropolitan area population. The latest, unofficial city government figures show that the non-white population of Washington is now more than 71 percent, or more than 575,000. The city's non-white population advanced 4.5 percent over the previous year, as of July, 1967. No other city in the country matches the more than 90 percent that blacks represent in the District's school enrollment.

Percent Distribution expenditures for current consumption:

	WHITE	NEGRO
Expenditures for current consumption	100.0	100.0
Food, Total	22.7	25.6
Food prepared at home	17.1	19.5
Food away from home	5.6	6.1
Tobacco	1.4	1.5
Alcoholic Beverages	1.6	2.5
Housing, Total	31.6	34.8
Shelter	16.3	19.8
Rented Dwelling	7.4	10.5
Owned Dwelling	8.3	9.2
Other Shelter	.5	.1
Fuel, light, refrigeration, water	4.0	4.2
Household operations	6.2	6.9
House furnishings and equipment	5.0	4.0
Clothing, cloth, materials, services	10.3	11.0
Personal Care	2.7	3.3
Medical Care	6.2	4.4
Recreation	3.8	3.8
Reading	.9	.8
Education	1.4	.1
Transportation	14.7	10.9
Automobile	12.0	8.1
Other travel and transportation	2.7	2.8
Other expenditures	2.6	1.3

(Over)

INCOME

A percentage breakdown of household income of metropolitan Washington's Negro homemakers*, is as follows:

Under $5,000	50.1 %
$ 5,000 - 7,999	31.8 %
$ 8,000 - 9,999	7.6 %
$10,000 and Over	10.5 %

*The female 18 and over who usually does most of the shopping for the household.

MEDIA

Radio Station WOOK
5321 First Place, Northeast
Washington, D. C. 20011

Radio Station WOL-FM
2000 "P" Street, Northwest
Washington, D. C. 20036

Radio Station WUST
815 Vee Street, Northwest
Washington, D. C. 20001

The Afro-American
1000 "U" Street, Northwest
Washington, D. C.

The Observer
811 Florida Avenue, Northwest
Washington, D. C.

The Washington Informer
715 "G" Street, Northwest
Washington, D. C.

MARKETING CLIMATE

The climate for market development in Washington, D. C., is considered good. Negroes are worth more than $500-millions in retail sales annually. Federal employment of blacks is over 25 percent of the total, and this continues to grow. Some 5,000 blacks have moved into the suburbs in the past year. The civil disturbance of the last year did affect marketing to Negroes in the District, but the situation has improved. In nearby Montgomery County (Maryland), at least 400 Negro families have moved into previously all-white or slightly integrated neighborhoods within the last four years. WOOK-TV, the nation's first, and believed to be only, Negro-oriented television station continues operations.

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Sources: See Appendix

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APPENDIX I

RANKINGS BY METROPOLITAN AREA AND CITY POPULATIONS

RANK OF CITIES SURVEYED - BY METROPOLITAN AREA NEGRO POPULATION

NO.	MARKET	NEGRO POPULATION	PERCENTAGE
1.	New York	1,460,700	10.5 %
2.	Chicago	1,262,900	17.3 %
3.	Philadelphia	926,000	19.0 %
4.	Detroit	738,000	17.9 %
5.	Washington, D. C.	725,895	27.0 %
6.	Los Angeles	722,943	10.2 %
7.	Baltimore	457,000	13.7 %
8.	Houston	378,325	22.4 %
9.	Dallas/Fort Worth	358,428	17.0 %
10.	New Orleans	339,500	31.5 %
11.	San Francisco/Oakland	332,745	12.0 %
12.	St. Louis	319,600	15.0 %
13.	Newark	293,355	42.3 %
14.	Cleveland	286,636	14.0 %
15.	Memphis	280,176	35.0 %
16.	Atlanta	277,600	22.0 %
17.	Birmingham	239,300	28.5 %
18.	Pittsburgh	184,600	9.0 %
19.	Cincinnati	179,200	13.2 %
20.	Norfolk/Portsmouth	163,433	24.5 %
21.	Kansas City	156,736	12.0 %
22.	Boston	130,273	5.0 %
23.	Richmond	107,836	26.4 %
24.	Milwaukee	100,600	6.9 %

*

Note: This listing does not include Columbus, Ohio or Indianapolis, Ind., since no current, reliable information was available at the time of publication.

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RANK OF CITIES SURVEYED - BY CITY NEGRO POPULATION

NO.	MARKET	NEGRO POPULATION	PERCENTAGE
1.	New York	1,294,400	14.7 %
2.	Chicago	1,020,000	30.2 %
3.	Philadelphia	640,000	32.0 %
4.	Detroit	600,000	41.0 %
5.	Washington, D. C.	575,000	71.0 %
6.	Los Angeles	533,600	18.9 %
7.	Baltimore	382,000	40.0 %
8.	Houston	368,934	20.4 %
9.	St. Louis	300,000	37.0 %
10.	Cleveland	276,376	34.1 %
11.	New Orleans	274,500	41.6 %
12.	Dallas/Fort Worth	256,900	**
13.	Atlanta	236,072	46.0 %
14.	San Francisco/Oakland	227,995	**
15.	Memphis	213,037	39.7 %
16.	Newark	209,916	52.2 %
17.	Cincinnati	150,300	28.5 %
18.	Birmingham	148,072	40.0 %
19.	Kansas City	145,800	20.0 %
20.	Pittsburgh	128,684	20.0 %
21.	Norfolk/Portsmouth	123,027	**
22.	Boston	104,700	17.0 %
23.	Milwaukee	99,822	12.7 %
24.	Richmond	92,331	52.0 %

*

**			
	Dallas/	187,800	13.1 %
	Fort Worth	69,100	10.2 %
	San Francisco/	93,000	12.3 %
	Oakland	134,995	34.5 %
	Norfolk/	82,043	26.4 %
	Portsmouth	40,984	34.7 %

Note: This listing does not include Columbus, Ohio, or Indianapolis, Ind., since no current, reliable information was available at the time of publication.

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APPENDIX II

REFERENCE SOURCES

The following reference sources were generally used throughout the preparation of the Revised MetroMarkets Report:

Bureau of Labor Statistics, U. S. Department of Labor

Bureau of the Census, U. S. Department of Commerce

In addition, information was garnered from the sources listed below in each of the following cities:

ATLANTA

The Atlanta Inquirer

The Atlanta Journal-Constitution

The Atlanta Chamber of Commerce

BALTIMORE

Radio Station WEBB

Radio Station WWIN

The Afro-American Newspapers

Baltimore Chamber of Commerce

The Baltimore SUNpapers

BIRMINGHAM

Radio Station WENN

Radio Station WJLD

Birmingham World

Birmingham Area Chamber of Commerce

BOSTON

United Community Services of Metropolitan Boston

The Boston Globe

Greater Boston Chamber of Commerce

CHICAGO

Radio Station WBEE

Radio Station WVON

The Chicago Tribune

Chicago Sun-Times

Chicago Daily News

University of Illinois, College of Business Administration

Chicago Association of Commerce and Industry

CINCINNATI

Radio Station WCIN

The Cincinnati Enquirer

Greater Cincinnati Chamber of Commerce

CLEVELAND

Radio Station WABQ

The Call and Post

The Plain Dealer

Greater Cleveland Growth Association

Ohio Bureau of Employment Compensation

City of Cleveland Annual Report, 1967-68

DALLAS/FORT WORTH

Radio Station KNOK

Dallas Negro Chamber of Commerce

The Urban League of Greater Dallas

The Dallas Morning News

DETROIT

Radio Station WCHB

Radio Station WJLB

The Detroit Urban League

The Detroit News

Detroit Regional Transportation and Land Use Study

HOUSTON

Radio Station KYOK

The Houston Chronicle

The Houston Chamber of Commerce

KANSAS CITY

Radio Station KPRS

The Kansas City Star

The Chamber of Commerce of Greater Kansas City

LOS ANGELES

Radio Station KGFJ

The Los Angeles Times

Los Angeles Chamber of Commerce

MEMPHIS

Radio Station WLOK

Radio Station WDIA

Memphis Press-Scimitar

Memphis Area Chamber of Commerce

MILWAUKEE

Radio Station WNOV

Metropolitan Milwaukee Association of Commerce

NEWARK

New Jersey Afro-American

Greater Newark Chamber of Commerce

NEW ORLEANS

Radio Station WBOK

Total Community Action, Incorporated

The Times-Picayune

New Orleans States-Item

Chamber of Commerce of the New Orleans Area

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NEW YORK

Radio Station WLIB

The Amsterdam News

The New York Times

The New York Daily News

NORFOLK

Radio Station WRAP

Radio Station WHIH

The Norfolk Journal and Guide

Tidewater Area Council for Community Improvement, Incorporated

Southeastern Tidewater Opportunities Project

PHILADELPHIA

Radio Station WHAT

Radio Station WDAS

The Philadelphia Tribune

The Philadelphia Inquirer

Greater Philadelphia Chamber of Commerce

PITTSBURGH

The New Pittsburgh Courier

The Pittsburgh Press

Chamber of Commerce of Greater Pittsburgh

RICHMOND

The Richmond Afro-American

ST. LOUIS

Radio Station KXLW

The St. Louis Argus

The St..Louis Sentinel

St. Louis Globe-Democrat

St. Louis Post-Dispatch

Chamber of Commerce of Metropolitan St. Louis

SAN FRANCISCO/OAKLAND

Radio Station KDIA

Radio Station KSOL

Oakland Tribune

The San Francisco Chronicle

Greater San Francisco Chamber of Commerce

WASHINGTON

Radio Station WOL

The Washington Post

The Washington Evening Star

Metropolitan Washington Board of Trade

SPANISH-LANGUAGE
MARKETS

50198 9366

R. J. Reynolds

Spanish-Language Market Study

I. The Market - Profile of the Spanish-Speaking Consumer

A. Population

B. Income/Employment

C. Education

D. Language

II. Marketing Results of U. S. Companies

III. Media Planning Implications

A. Spanish-Language Media Usage Rationale

B. Media Analysis

1. Radio

2. Television

3. Print

4. Transit

5. Outdoor

IV. Media Directory

V. Advertising Execution

VI. Competitive Advertising Expenditures

MARKET PROFILE

50198 9368

R. J. Reynolds

Spanish-Language Market Study

I. The Market - Profile of the Spanish-Speaking Consumer

A. Population

The Spanish-speaking population in the United States is estimated at about 10,185,000. The U. S. Census population projection indicates that by 1975 it will total 15 million. The current population is more than three times that of Madrid. About one out of every 17 inhabitants of the U. S. are Spanish-speaking and/or have a Latin surname. According to the U. S. Census, the average U. S. Spanish-speaking family has slightly more than four people per household. These families have their own traditions and customs influencing their consumer habits.

Although representing only about 5% of this country's total population, they make their presence felt because most of this group is concentrated in a few sharply defined areas. Of the more than 10 million, almost half live in the Southwest (Texas, New Mexico, Arizona, Colorado), their families having crossed the Mexican border to settle in the area several generations ago.

The New York metropolitan area, fifth largest Spanish market in the world, has a Spanish-speaking population

of over 2 million, almost half of which are Puerto Rican (47%). About 37% are Cuban, 14% are from Spain, 12% from the Dominican Republic, and the others are South American immigrants. This is the only market that is represented by all major Spanish-speaking nationalities.

Los Angeles, the world's sixth largest Spanish market, has one and a half million Spanish-speaking Americans, primarily of Mexican origin, making it the third largest U.S. area in sizing up this market. Northern California has another half-million Mexican-Americans.

Florida's Cuban dominated Spanish-speaking market has grown to almost half a million people most of whom have settled in Dade County and Tampa.

Chicago has 300,000 Spanish-speaking people made up of a mixture of Mexicans, Puerto Ricans, and Cubans. There are other population pockets in Connecticut, Ohio and other states.

E. Income/Employment

According to a survey conducted by First Research Corporation, the U.S. Spanish-speaking consumers spend almost a million dollars a day on goods and services alone. Although most of them may be classified as "lower income" (the average annual Latin family income in New York is approximately $4,800, about 10% below that of "all others"),

the employment rate is generally high and both family income and the number gainfully employed is steadily rising. The highest average annual family income is in Los Angeles where it is approximately $5,900 per year. Because they had more money to spend, national advertisers were first attracted to this area. Projecting 1960 U.S. Census figures, Latin American families living in a nine-county* Northern California area have a median income of $5,710 per year. In this area 92% of the male labor force is employed as compared to 96.7% of the total U. S. white population and 92.7% of the total U.S. Negro population. The Latin-speaking female labor force of 33,258 accounts for 33% of the total female population.

The Mexican-American Study Project at UCLA reported that in 1967 the annual median income for Spanish-surname workers (primarily Mexican-Americans) living in California and the Southwest Cresent totaled $1,000 less than that for their Anglo counterparts. This difference is due, in part, to a greater ratio of this population being concentrated in government work which usually pays less than a like position in private industry and, in part, to less experience and seniority in the Spanish-surname population as a whole.

* The nine-county area includes Alemeda, Contra Costa, Marin, San Francisco, San Mateo, Solano, San Joaquin, Sacramento, and Santa Clara.

In Miami, 92.8% of the household heads are employed, with an average annual family income of $5,400. Approximately 25% of the family heads earn more than $600 a month. The Latin population of Dade County has grown tremendously in the past few years due to the influx of Cuban refugees. They resisted resettlement in other areas in the hope that they would return home again.

In the Miami metropolitan area, a combination of Cuban dexterity and American enterprise has created a big garment industry. Some 350 clothing factories, from large technologically advanced plants to small, sparsely equipped family shops, are operating in the metro area. They are employing more than 12,000 workers and 85% are Cubans. Spanish business in New York City also is formidable. There are more than 4,000 bodegas (Spanish grocery stores), 750 drug stores, 26 theaters, several weekly and daily newspapers, and at least three radio and two television stations fully programmed in Spanish. Spanish grocery stores serve about 40% of the Spanish market. Only 60% of the Spanish-speaking housewives in New York shop in supermarkets, though 85% say they prefer them, reflecting the non-welcome the Latin groups feel they get.

The Mexican-Americans in the Southwest Cresent (this excludes California, whose Latin inhabitants generally hold more "urban" and higher paying jobs than do their rural counterparts in "the Cresent") have the highest

rate of employment and the lowest median income among the U. S. Spanish-speaking peoples. As expected, when they enter the employment world from the unemployed ranks they fill initial jobs slotted in the lowest-paying positions.

C. Education

According to the 1960 U. S. census figures, the median school years completed by Spanish-surname males in the Southwest Cresent was 8.1 compared with 11.8 for whites. Seven percent (7%) of the Spanish-surname population in this area had completed one year of college as compared with 24% of the white population. Nationwide, 75% of the white population between ages 25-29 have finished high school. In New York City, only 2% of those people who are 18 or 19 years of age are in college and 92.2% of all Spanish-speaking New Yorkers currently are not studying, learning a trade or being trained. Of these, 31% are elementary grade dropouts and 18% are high school dropouts. While there are no figures currently available on the educational levels of Spanish-speaking people in the other locations, the statistics for the Southwest Cresent and the metropolitan New York area are indicative of the educational levels and academic pursuits of these people in other sections of the country, excluding the Cubans. As a group, the Cubans were much better educated when they arrived in the United States and, unlike all other Spanish-

speaking groups, nearly 80% of them have been here less than eight years.

D. Language

The key element that defines a U. S. Spanish market is language. Clinging to the native tongue by Spanish people of all ages in the United States has done more than anything else to impede their education and, therefore, their financial progress. While it is recognized that there is some spillover from English-language media, it should be remembered that 38% of all Puerto Ricans (and there are 950,000) in New York speak no English at all and bilingualism among the remainder is often of a token nature. Surprising to most advertisers, the same facts hold true with the Cubans. There is a misconception that since they are better educated, they are also bilingual and therefore are reached by the general media. However, these people continue to speak Spanish by choice, although many are bilingual.

Of 230,000 Puerto Rican pupils in the New York City school system, NYC Board of Education officials estimate 31% can't even speak passible English, much less read or write it. This is true even though most of these students were born in the U.S. Teachers say it is hard to instruct Puerto Ricans in English because most of their parents use Spanish exclusively at home. By the same token, getting Puerto Rican, Mexican or Cuban adults to use English rather than

Spanish also has proven extremely difficult. The Puerto Ricans in New York, the Mexican-Americans in the Southwest Cresent, and the Cubans in Florida, all have varying cultural ties and economic stability, but the language is the same, and these people are in no hurry to abandon it through assimilation. Most authorities agree that it will take generations for the Spanish-speaking immigrants to become assimilated as the Italian, Jewish, Hungarian and other immigrants have.

The political, social and economic power structures around major population centers inhabited by large numbers of Spanish-speaking people accept the fact that as far as the language barrier is concerned, it is a fait accompli. No longer does a Spanish-speaking voter have to know how to read or write English in order to vote in New York State. Report cards are now being issued in Spanish for the parents of children coming from Spanish households. The yellow pages of telephone books contain information in Spanish. The major airlines have recognized the language situation by printing instructions in both English and Spanish for emergency procedures, restroom directions and seat occupied cards. Police and welfare workers in cities with large Spanish-speaking populations are continuing to be given instructions in Spanish.

In the mid-1960's, Quaker Oats had a study conducted in the Southwest Cresent and found that while 70% of the

respondents were American born, only 24% used English in the home. About 40% used "only Spanish" at home and the remaining 30% used both English and Spanish equally. Pulse Incorporated in New York found that only 7-8% of the Puerto Ricans use English at home. Another study of the New York market shows that of the total Spanish-speaking population, 89% generally think in Spanish, 71% speak English only enough "to get by," and 91% speak Spanish at home.

R. J. REYNOLDS

U. S. SPANISH SPEAKING MARKETS

(By Regions)

Southwest		4,910,000
Texas	1,920,000	
Border (Mexico)	1,890,000	
New Mexico	290,000	
Arizona	280,000	
Colorado	260,000	
Other	270,000	
West		2,200,000
California	2,200,000	
Northeast		2,195,000
New York	2,100,000	
Other	95,000	
Southeast		480,000
Miami	275,000	
Tampa	125,000	
Other	80,000	
Midwest		300,000
Chicago	300,000	
Other U. S.		100,000
TOTAL		10,185,000

CGH:jh
8/28/69

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R. J. REYNOLDS

SPANISH SPEAKING POPULATION

TOP 17 SPANISH SPEAKING METRO MARKETS

New York, New York	2,100,000*
Los Angeles, Calif.	1,500,000
El Paso/Juarez, Tex.	700,000
San Antonio, Tex.	586,600
San Fran., Calif.	500,000**
Chicago, Ill.	300,000
Miami, Fla.	275,000
Albuquerque, N. Mex.	200,000
Corpus Christi, Tex.	200,000
Houston, Tex.	175,000
Fresno, Calif.	175,000
Phoenix, Ariz.	150,000
Philadelphia/Camden	130,000
Tampa, Fla.	125,000
Denver, Colo.	110,000
Dallas, Tex.	90,000
Washington, D. C.	45,000
	7,361,600

*Metro area.
**A nine county area that includes Alameda, Contra Costa, Marin, San Francisco, San Mateo, Solano, San Joaquin, Sacramento, and Santa Clara.

U. S. SPANISH SPEAKING POPULATION ORIGINS

The origin of the Spanish Speaking Population in the U. S. can be traced to four major countries:

More than 225,000 Spaniards from Continental Spain.

Over 6,000,000 from Mexico, including many second and third generation Mexican-Americans who continue to speak Spanish, residing mostly in the Southwestern crescent.

Over a million from Puerto Rico most of whom reside in New York. Recent efforts have been made to funnel the Puerto Rican migration away from the New York Metropolitan area.

Almost 1,000,000 from the other Spanish speaking Republics of Central and South America, including Cuba. Unrest in many Latin American countries has swelled the number of people from these countries who now live in the U. S., mostly in Florida and New York.

Source: U. S. Census

CGH:jh

MARKETING RESULTS

50198 9379

R. J. Reynolds

Spanish-Language Market Study

II. Marketing Results of U. S. Companies

When a good choice is available, reports the Ted Bates Agency, Spanish-speaking people tend to favor and are influenced by Spanish-language media. In support of this position, when brand standings were compared between Puerto Rico and New York in a recent study by Needham, Harper, & Steers, some dramatic shifts were apparent. Advertisers who paid particular attention to the New York Puerto Rican market seemed to have received a good return on their investment while others who took that community for granted (particularly if they already had a dominant share of the market in Puerto Rico) have suffered. The Pepsi Cola Company has always paid a great deal of attention to these consumers. They have constantly used Spanish media and, as a result, Pepsi Cola outsells Coca-Cola in the New York Spanish market, although Coca-Cola outsells Pepsi Cola in the general market and also in Latin America. Although the Spanish market is only about 10% of the New York metropolitan market, sales of Pepsi Cola in the Spanish market account for about 30% of Pepsi Cola's sales in the metropolitan area.

A similar situation exists with Shaeffer beer, which was unknown to Spanish-speaking people until they came to New

York, with the exception of those coming from Puerto Rico, where Shaeffer has an insignificant share of market. After four years of unrelenting, effective Spanish advertising and promotion, Shaeffer is number one in Spanish-speaking New York and has gained such a position within this market, that these sales represent about 40% of their total sales in the metropolitan area.

In Los Angeles, there are numerous examples where brands using Spanish radio topped all competition in the Latin market. One of the most outstanding examples is the 90% usage of Best Foods' Hellmann's Mayonnaise, as compared to Kraft Mayonnaise which has less than 5% of the Los Angeles Spanish market.

These are good examples that the buying habits of Spanish-speaking people can be changed from their traditional buying habits, but this cannot be done with the English spill-over, for we are talking about a market with different backgrounds, environments, personalities, tastes, sense of humor, and even with different concepts of family and country from its counterpart, the American market.

MARKET STUDY

50198 9382

R. J. Reynolds

Spanish-Language Market Study

III. Media Planning Implications and Advertising Execution

A. Spanish-Language Media Usage Rationale

Most research indicates that there is no mathmatically impelling reason to use Spanish-language media merely to reach the Spanish-speaking consumer. However, most media basically reflect the interests, desires, and aspirations of their primary audience, which is largely middle-class white. Classification of these media as "white oriented" media would be far more accurate and functional than their most frequent classification as "general" media. Therefore, to be effective, advertisers should use customer-oriented media in which 10,000,000 Spanish-speaking Americans can truly identify with in the same manner as white consumers do with media oriented to them. There are three clear-cut reasons why Spanish-language media is important and influential in the U. S. Spanish-speaking consumer market. This media

- is the only media available on a day-to-day basis, for the most part, which specifically and effectively influences the Spanish consumer,
- supplies the listener with advertising in which he is confident is meant for him, and

- supplies a communications media which plays the music they most prefer and apprises them of daily happenings throughout the nation and world of particular interest to them as Spanish-speaking Americans.

The point is that the wide-spread assumption that "general" media reaches the Spanish-speaking consumers anyway and that special campaigns directed to them are not necessary, is a doubtful premise. Although English-language media probably reach more Latins than the Spanish-language media, "reached" and "persuaded" are two entirely opposite marketing objectives. Spanish-language media is not important for coverage. Its strength lies in the emotional influence it has on its audience. Spanish-language media should be viewed by marketing strategists on the basis of "audience delivered" (this one numbers 10,000,000) rather than, as often is the case, a questionable adjunct to general media.

B. Media Analysis

Significant current developments in the buying, selling and programming of Spanish-language media include the growing influence of UHF television, major inroads at the advertiser and agency levels, the more youthful approach being taken by radio, and the increased attention being given to the major problem of Spanish-language audience measurement. Many companies employ Spanish-speaking salesmen to call on stores in areas heavily populated by Spanish-speaking customers. Virtually every major

advertising agency now has someone who might be termed the ethnic market specialist and many have people who can write commercials in Spanish.

Among the agencies that have formally recognized the scope and potential of the Spanish-speaking market are the following: Compton, Grey, Young & Rubicam, Dancer-Fitzgerald-Sample, and the Louis D. Albertini Agency. Albertini, a specialist in this field, handles the Spanish-speaking market advertising for such advertisers as P. Lorillard and Colgate-Palmolive. Increased awareness among national advertisers may be attributed in large part to Spanish-language television, which is spreading throughout the United States.

1. Radio

It is an acknowledged fact that Spanish-language radio is the principal means of reaching and influencing the Spanish consumer in this country. It is relatively inexpensive, it can pinpoint the consumer neatly, and is available on an around-the-clock basis in many areas. Programs range from music-and-news shows to soap operas and increasingly consist of public service programs. In New York City, 99.6% of all the Spanish-speaking families have at least one radio and 85% have two or more in their home.

The most notable change in Spanish-language radio has been its program format providing for more

and more music and being directed toward the young adult listener, in contrast to the once extremely popular novellas (Spanish soap operas) which appeal primarily to older Latins. Although novellas are still featured on Spanish-language radio stations, the trend is sharply toward music.

For years, many Spanish-language radio stations, wise to the local Latin idiom, have been aiding local and national advertisers in reaching the Spanish market effectively. Radio stations such as KCOR, San Antonio, KWKW, Los Angeles, WADO and WHOM New York and WMIE, Miami, have been doing on-the-spot adaptations of commercials as well as recorded spots utilizing the personal sell of the local station personality, who still remains the most effective salesman and advertiser it can have.

Spanish-language radio has shown spectacular gains in listenership and market penetration. Eduardo Caballero, a sales executive with WBNX radio, New York, points up the influence of Spanish media in the Spanish-speaking market.

"In a recent survey conducted in New York among Spanish-speaking people, results showed that 95% listened "most often" to Spanish radio while only 4% listened to

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American radio "most often". The result of this is the fact that in every study conducted in the Spanish-speaking market, those products advertised in Spanish media have a bigger share of the Spanish market than those not using Spanish-oriented media. This market is highly individual in its product and brand preferences -- and these brands, if marketed in the proper way, can produce very good dividends to smart advertisers."

2. Television

Television possesses great potential for reaching the Spanish population. Although its growth was initially hampered by its audience's inability to receive UHF signals, the all-channel law passed in April, 1964 has given this ethnic medium the impetus for success.

Nationally there is a 95% TV penetration of the Latin population, with a range of 57-75% of all-channel sets in those areas which have full-time Spanish-language UHF stations. There are currently four full-time and nine part-time Spanish-language television stations in the U.S. While once considered only an ethnic medium, Spanish-language TV is now com-

peting in many locations, particularly in the Southwest, on an equal footing with "general" TV for media dollars. Spanish-language UHF stations in the country's top three markets received consistently higher audience shares among the Spanish surname population than their VHF competitors according to findings of Med-Mark, Incorporated,* a media and marketing research firm specializing in UHF and ethnic analysis. Survey results showed that in nearly one-half the time slots polled for station KMEX-TV in Los Angeles, the share was double or more than that of the leading English-language VHF station. In two-thirds of the time periods polled for WNJU-TV in New York and WCIU-TV in Chicago, the audience share was twice as large as the highest English-language VHF station viewed.

Popularity of these Latin appeal stations was also indicated by a high degree of UHF penetration in the areas polled. In Los Angeles, UHF penetration is 80% ahead of the national average while New York supercedes this average by 60%. Chicago with a UHF penetration of almost 60%, is 18% more than the 42% national figure recently released by the U. S. Census Bureau. Al Petgen, President of Med-Mark, Inc., said that larger

*The New York Times reports that "its reports are accepted by the television industry and advertising agencies."

families and more loyal viewing patterns among Spanish-Americans are the two most important factors in the impressive statistics for Spanish UHF.

However, while Spanish-language television has good penetration, its reach figures provide a different perspective. Med-Mark reports "There are 527, 350 Spanish-speaking households in the 17 county New York viewing area. Of these, 501, 458 have TV sets, and of those with sets, 406, 181 have sets equipped to receive UHF signals. With four people per household, the potential Spanish-language UHF audience is currently about 1.6 million people. The New York area's two stations are watched nightly by an estimated total of 481,000 Spanish-speaking people. Therefore, New York's two stations reach only one quarter of the potential audience.

The most popular TV show is the Novella. More than 1,500 half-hour episodes are produced annually. These shows run to a maximum of 60 episodes but usually end after 13 weeks -- the advertiser's package. They cost an estimated $1,500 for each half-hour to produce. Like movies, Novellas have their own theme music, and

some become hit records heard over and over on Spanish-language radio stations. Next in popularity is the musical variety show -- a la Ed Sullivan. Folklore programs tend to be traditional, with the emphasis on the dances which are as familiar to tourists as they are to Mexicans. After soap operas and music, Spanish audiences like sports best. Pre-eminent are the bull fights taped every week of the year in Mexico City with an additional 20 weeks from Tiajuana. Next to bull fighting, soccer is probably the most popular sport on Latin TV. It is broadcast from Mexico City, the world's largest soccer stadium, where 105,000 people can watch not only the Mexican teams, but also visiting stellar teams from Russia, Madrid, Turin, Yugoslavia, Brazil, England, and elsewhere. Other programming centers on children's shows and special news shows.

3. Print

William Esty reports that "Most markets are not adequately covered by Spanish-language newspapers," and that "There are only two Spanish magazines worthy of noting in the entire country." They further state that "A restricting weakness of the Spanish magazine

50198 9390

may well be its inability to attract certain select segments of the Latin audience."

Newspapers

New York has the best coverage of all major Spanish-language population centers. Both El Diario - La Prensa (78,476) and El Tiempo (45,000) serve this area. However, since there are over 500,000 families in New York City and the combined circulation of these two publications is 123,476, the Spanish-language newspapers reach less than 25% of the potential audience. Other areas have even less circulation per Latin. For instance, Diario Las Americas (Miami) has a circulation of 30,265 and La Opinion (Los Angeles) 14,000. Chicago has three small weeklies and the "Cresent" is served by a few small Mexican papers.

Magazines

Temas and Pimienta are the two best Spanish-language magazines. Temas' total circulation is 76,140 but 50,600 of it is in the New York area. Therefore, its ability to reach Spanish-speaking consumers in other locations is ineffective. Pimienta has a national circulation of 65,000 and a New York circulation of 20,000.

A study by Dr. Martin Velilla, founder of Persuasian Research, supports Esty's position. He found that the Spanish-speaking people were not attracted to Spanish media, when in search of entertainment or information. Program quality is the primary factor that determines their selection. "I have found a strong percentage of people who do not read English but buy the Daily News three to seven times a week and regularly purchase Look and Life magazines. Our research shows that there are not really good Spanish-language U. S. magazines or newspapers. They are generally poorly edited and printed, according to my survey. I recommend that in advertising in print to the Spanish New Yorkers, for instance, advertisers do so in Spanish in the New York Daily News and TV Guide, as they have the largest circulation in Spanish households."

4. Transit

The New York Subways Advertising Company reports a steady increase in the amount of Spanish-language advertising in the Subways. English/Spanish ads, all Spanish ads, and split-run ads (where an advertiser will run three English ads to each Spanish ad) are the pattern favored by such advertisers as Pan American Airways, Bacardi, Canada Dry, El Pico Coffee and Campbell's Soup

who are out to influence the 600,000 Spanish-speaking subway riders.

5. Outdoor

Billboards are considered an effective medium especially when used to execute brand awareness strategy. It allows for showings keyed to Spanish-speaking areas tailored to specific markets.

The fact remains that radio is the most effective Spanish medium. While 75% of the Spanish-speaking New Yorkers prefer to tune in "Spanish radio only", 81% prefer to view English-language TV, only 12% buy "only Spanish" newspapers, and only 11% frequently buy "only Spanish" magazines. This is borne out again in a Benton & Bowles study of the U. S. Spanish-language consumer. It is stated that the principal and most effective means of reaching and influencing the Spanish consumer is still Spanish-language radio, although UHF-TV is becoming an important factor in reaching this market. The significance of live media is partly due to the limited availability and questionable quality of Spanish-language print.

MEDIA DIRECTORY

50198 9394

R. J. Reynolds

Spanish-Language Market Study

Media Directory Index

I. Media Directory Summary

II. Exhibit I — Spanish Television Markets

Exhibit II — Spanish Radio Markets

Exhibit III — Spanish-Language Newspapers

Exhibit IV — Spanish-Language Magazines

Exhibit V — Spanish Outdoor

Exhibit VI — Spanish Theaters - New York

R. J. Reynolds

Spanish-Language Market Study

IV. Media Directory

Broadcast media represents the most efficient and effective means of reaching the Spanish market, with Spanish radio being universally available, and Spanish television, although available to a lesser degree, none the less an important factor in certain markets. Spanish newspapers are not an important media factor, except, perhaps in New York, and Spanish magazines are limited and questionable because of non audited circulation. We believe that Spanish-language Outdoor can be an effective reminder medium.

Television

There are fourteen Spanish language television stations, eleven of which are located in the Southwest and/or on the West Coast. Of the remaining three Spanish language television stations, two cover the Metropolitan New York Market and the third operates in Chicago. Exhibit I outlines by market the total Spanish-speaking population, % of Spanish-speaking population to total market, the Spanish-language TV stations located in the market, as well as their channel number, time on air and an estimate of the TV homes able to receive them.

Generally, the programming on the stations consists of sports (Boxing, Wrestling, Bull Fights, Soccer), musicals (Variety and

Comedy), novellas (adult soap operas run as serials) and drama, as well as Spanish movies, local live programs, news, public service and special events (such as live telecasts from Mexico City).

Since most Spanish TV stations are UHF transmissions, motivation for Spanish-speaking homes to convert to UHF is significantly higher than that of the general public. In New York, for example, UHF penetration in Spanish speaking homes is estimated at 73% compared to 29% for all television homes.

Radio

Radio represents a primary means of reaching the Spanish market. Although there are over 250 stations in the U.S. with one or more hours of Spanish-speaking programming each week, there are 47 stations which can be considered as a major influence on the Spanish market. Exhibit II shows by market the pertinent media information on these stations.

The programming format of these stations, generally, over the past few years has been moving more to music appealing to the young-adult listener, as compared to the former programming emphasis which relied heavily on the novella, appealing to the older age groups.

Newspapers

Spanish-language newspapers, with but few exceptions, are limited in circulation and provide a relatively low household coverage in their respective markets.

There are 14 newspapers to be considered in reaching the Spanish-language population in the U. S. El Diario-La Prensa in New York is the most widely read of all these newspapers, yet this publication only provides coverage of approximately 20% of the Spanish-language households in the New York Metro Area.

Exhibit III lists, by markets, these Spanish language newspapers.

Magazines

There are only three Spanish-language publications worth considering at this time, for providing coverage of the U.S. Spanish market -- Temas, Pimienta and Vanidades. None of these has an audited circulation. (Exhibit IV)

Outdoor

Outdoor advertising represents an effective means of delivering reminder messages to the Spanish market, since showings can be tailored to locations in Spanish neighborhoods. (Exhibit V)

Cinema

Cinema advertising opportunities in New York, like outdoor, can be tailored to specific neighborhoods. However, there are reservations about the use of this medium due to lack of demographic data on the movie audiences, and because of questionable verification techniques.

Exhibit VI lists Spanish-language theaters in the metropolitan New York area, as well as estimated weekly audiences.

R. J. REYNOLDS TOBACCO COMPANY

SPANISH TELEVISION MARKETS

Market	Metro Pop. (000)	Spanish Pop. (000)	%	Station	Channel	On Air*	TV Homes Potential
Chicago, Ill.	6,591	250	4	WCIU-TV	26 (UHF)	5:00PM-7:00PM (Sat.-Sun.)	35,000
El Paso, Tex./Juarez, Mex.	613	195	32	XEJ-TV XEPM-TV	5 (VHF)	5:00PM-11:00PM) 2:00PM-8:00PM)	99,150
Fresno, Calif.	420	101	24	KAIL-TV	53 (UHF)	5:00PM-11:00PM) (Sun.-Fri.)) 10:00AM-11:00PM) (Sat.))	
				KICU-TV	43 (UHF)	2:00PM-11:30PM) (Mon.-Fri.)) 7:30PM-11:00PM) (Sat.)) 9:00AM-7:00PM) (Sun.))	30,000
Imperial Valley, Tex./ Mexicali, Mex.	491	445	91	XHBC-TV		3:30PM-12:00M (Sun.-Sat.)	59,820
Laredo, Tex./Nuevo Laredo, Mex.	188	72	38	XEFE-TV	2 (VHF)	24 hours	27,100
Los Angeles, Calif.	9,865	906	10	KMEX-TV	34 (UHF)	4:00PM-11:30PM) (Mon.-Fri.)) 10:00AM-11:30PM) (Sat.-Sun.))	
				KLXA-TV	40 (UHF)	5:00PM-11:30PM) (Mon.-Fri.)) 9:00AM-11:30PM) (Sat.-Sun.))	225,000

*Note: All or part of Air Time is Spanish Programming

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R. J. REYNOLDS TOBACCO COMPANY

SPANISH TELEVISION MARKETS

Market	Metro Pop. (000)	Spanish Pop. (000)	#	Station	Channel	On Air*	TV Homes Potential
New York, N. Y.	11,687	1,800	15	WXTV	41 (UHF)	6:00PM-11:30PM (Mon.-Fri.) 4:00PM-11:30PM (Sat.-Sun.)	361,700
				WNJU-TV	47 (UHF)	5:30PM-12:00M (Mon.-Sat.) 4:00PM-12:00M(Sun)	
Phoenix, Ariz.	874	131	15	KPAZ-TV	21 (UHF)	10:00PM-12:00M (Sun.-Sat.)	44,400
San Antonio, Tex.	1,023	392	38	KWEX-TV	41 (UHF)	3:00PM-12:00M (Mon.-Fri.) 12:00N-12:00M (Sat.-Sun.)	81,200
San Diego, Calif./Tijuana, Mex.	1,578	119	8	XEWT-TV	12 (VHF)	4:00PM-1:00AM (Sun.-Sat.)	79,630

*Note: All or part of Air Time is Spanish Programming

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EXHIBIT II
Page One

R. J. REYNOLDS TOBACCO COMPANY

SPANISH RADIO MARKETS

Market	Spanish Metro Pop.	%	Station	Power#	Freq.	On Air	Spanish Pulse	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Albuquerque, N. Mex.	105,900	33	KABQ	5,000	1350	Daytime	DNA	-	-	-
Bakersfield, Calif.	64,700	19	KNAC	1,000/250	1490	24 Hrs.	DNA	-	-	-
Corpus Christi, Tex.	158,900	51	KCCT	1,000	1150	Daytime	April	27	29	29
			KUNO	1,000/250	1400	19 Hrs.	1967	51	56	44
Denver, Colo.	104,800	9	KFSC	1,000	1220	Daytime	DNA	-	-	-
Eagle Pass, Tex. / Piedras Negras, Mex.	DNA		XEMW				DNA	-	-	-
El Paso, Tex.	195,300	32	XELO	150,000	800	20 Hrs.	Feb.-	9	4	3
			XEJ	10,000	970	18 Hrs.	April	13	13	7
			XEWG	250	1240	19 Hrs.	1967	26	26	15
Fresno, Calif.	101,300	24	KGST	5,000	1600	Daytime	DNA	-	-	-
			KXEX	500	1550	Daytime		-	-	-
Harlingen, Tex.	122,200	74	KGBT	50,000/10,000	1530	11 Hrs.	DNA	-	-	-
Houston, Tex.	152,800	14	KLVL	1,000/500	1480	16 Hrs.	DNA	-	-	-
Laredo, Tex.	71,700	38	XEK	5,000/1,000	960	16 Hrs.	DNA	-	-	-
			XENU	5,000	1550	Daytime		-	-	-
Los Angeles, Calif.	905,500	10	KALI	5,000	1430	24 Hrs.	Oct.-Nov.	40	34	28
			KWKW	5,000/1,000	1300	24 Hrs.	1968	21	24	24
[illegible], Tex.	38,100	20	KFLB	500	1420	Daytime	DNA	-	-	-
[illegible], Mex.			XEAM				DNA	-	-	-
[illegible], Tex.	164,100	83	KCKT	1,000	1580	Daytime	DNA	-	-	-

DNA - Data Not Available #Day/Night

R. J. REYNOLDS TOBACCO COMPANY

SPANISH RADIO MARKETS

EXHIBIT 1
Page Two

Market	Spanish Metro Pop.		%	Station	Power#	Freq.	On Air	Spanish Pulse	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Mexicali, Mex.	445,000	3	91	XECL	5,000	990	21 Hrs.	DNA	-	-	-
Miami, Fla.	296,200	5	26	WFAB	5,000	990	24 Hrs.	June-Aug. 1967	62	48	33
				WLTO	250	1220	Daytime		-	-	-
				WQBA	10,000/5,000	1140	24 Hrs.		11	14	18
New Orleans, La.				WJMR	250	990	Daytime	DNA	-	-	-
New York, N. Y. ✓	1,800,000	1	15	WADO	5,000	1230	24 Hrs.	Jan.-Feb. 1969	66	47	49
				WBNX	5,000	1380	20 Hrs.		7	10	10
				WHOM	5,000	1480	19 Hrs.		26	30	28
Phoenix, Ariz. ✓	131,200	12	15	KCAC	500	1010	Daytime	Jan. 1969	37	30	35
				KIFN	1,000	860	Daytime		48	50	37
Pueblo, Colo.	43,200	24	3	KAPI	250	690	Daytime	DNA	-	-	-
Sacramento, Calif.	76,400	20	10	KJAY	500	1430	Daytime	DNA	-	-	-
Salinas, Calif.	31,800	24	13	KCTY	1,000	980	Daytime	DNA	-	-	-
San Antonio, Tex. ✓	391,700	4	38	KCOR	5,000	1350	24 Hrs.	March 1969	37	34	20
				KEDA	1,000	1540	Daytime		2	5	5
				KUKA	1,000	1250	Daytime		10	17	13
San Diego, Calif. ✓	119,000	13	8	XEAZ	500	1270	Daytime	DNA	-	-	-
				XEGM	3,500/2,500	950	24 Hrs.		-	-	-
				XEMO	5,000	860	20 Hrs.		-	-	-
				XEXX	2,000	1420	20 Hrs.		-	-	-
San Francisco, Calif. ✓	291,500	6	10	KOFY	1,000	1050	Daytime	DNA	-	-	-
San Jose, Calif. ✓	145,800	11	15	KAZA	5,000	1290	Daytime	DNA	-	-	-
Stockton, Calif.	53,200	23	19	KSTN	5,000/1,000	1420	24 Hrs.	DNA	-	-	-

DNA - Data Not Available

Day/Night

R. J. REYNOLDS TOBACCO COMPANY

SPANISH RADIO MARKETS

Market	Spanish Metro Pop.	%	Station	Power#	Freq.	On Air	Spanish Pulse	6:00AM-10:00AM	10:00AM-3:00PM	3:00PM-7:00PM
Tampa-St. Petersburg, Fla.	109,900	12	WSUL	5,000	1300	Daytime	DNA	-	-	-
[illegible], Fla.	110,900	35	[illegible]	250	690	Daytime	DNA	-	-	-
			KXEM	1,000	1600	Daytime		-	-	-
Washington, D. C.	-		WFAN-FM	18,400	100.3	18 Hrs.	DNA	-	-	-

DNA - Data Not Available
#Day/Night

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R. J. REYNOLDS TOBACCO COMPANY

SPANISH NEWSPAPER MARKETS

EXHIBIT III
Page One

Metro Area	Spanish Metro Pop.	Spanish % Of Mkt. Pop.	Newspaper	Edition	Circ.	Open Li. Rate	Milline	Color
Albuquerque, N. Mex.	105,900	33%	El Hispano	Weekly	3,965	$ NA	$ -	-
			El Independiente	Weekly	7,700	NA	-	-
Berkley, Calif.	118,300	11	Post	Weekly	2,500	NA	-	-
Dallas, Tex.	66,200	5	El Sol	Weekly	18,000	NA	-	-
El Paso, Tex.	195,300	32	El Continental	Daily	NA	NA	-	-
Laredo, Tex.	71,700	38	Times	Daily	19,851	.16	8.81	DNA
Los Angeles, Calif.	905,500	10	La Opinion	Daily	14,539	.26	17.58	DNA
			Grafica (Hollywood)	Bi-Mthly.	18,141	NA	-	-
Miami, Fla.	296,200	26	Diario Las Americas	Daily	29,704	NA	-	-
New York, N. Y.	1,800,000	15	El Diario-La Prensa	Daily	81,245	.95	11.49	Avail
			El Tiempo	Daily	42,000	.80	18.72	Avail
Phoenix, Ariz.	131,200	15	El Sol	Weekly	NA	NA	-	-
Santa Rosa, Calif.	10,700	6	Nuevas de Nuevo Mejico	Weekly	6,736	NA	-	-
Tampa, Fla.	109,900	12	La Gaceta	Weekly	9,825	NA	-	-

DNA - Data Not Available

9/15/69

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R. J. REYNOLDS TOBACCO COMPANY

MAGAZINES

SPANISH

Publication	Frequency	Circulation	Page B&W Cost*	Page B&W CPM#	Page 4-C Cost*	Page 4-C CPM#	Closing Dates
Temas (Spanish Lang.)	Monthly	78,000	$ 659	$ 8.44	$1,248	$16.00	B&W - 5th of preceding month 4-C - 5th of preceding month
Pimienta (Spanish Lang.)	Monthly	100,000	200	2.00	NA	-	B&W - 1st of second preceding mont 4-C - Not Available
Vanidades	Bi-Weekly	33,000(U.S. Ed.)	Rates To Be Determined				B&W - 8 weeks prior to issue date 4-C - 8 weeks prior to issue date

NA - Not Available
*Open Rate
#CPM based on circulation

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R. J. REYNOLDS TOBACCO COMPANY

OUTDOOR

SPANISH

Market	Criterion - 3 Sheet		Junior Posters - 6 Sheet	
	Number of Posters	Monthly Cost	Number of Posters	Monthly Cost
Albuquerque, N. Mex.	-	$ -	15	$ 300
Amarillo, Tex.	-	-	10	200
Austin, Tex.	-	-	10	200
Bakersfield, Calif.	-	-	15	450
Camden, N. J.	10	100	10	240
Carlsbad, N. Mex.	-	-	8	135
Chicago, Ill.	15	155	50	1,150
Cleveland, Ohio	8	80	15	360
Corpus Christi, Tex.	-	-	15	415
Dallas, Tex.	-	-	15	400
Denver, Colo.	-	-	20	500
Detroit, Mich.	10	105	10	190
El Paso, Tex.	-	-	25	435
Fort Worth, Tex.	-	-	10	200
Fresno, Calif.	-	-	15	450
Houston, Tex.	-	-	25	775
Laredo, Tex.	-	-	15	305
Los Angeles, Calif.	50	515	175	5,250
Lubbock, Tex.	-	-	15	260
Miami, Fla.	-	-	40	820
Midland, Tex.	-	-	5	100
New Orleans, La.	-	-	20	370
New York City, N. Y.	300	3,075	200	5,000
Odessa, Tex.	-	-	6	110
Philadelphia, Pa.	100	105	20	480
Phoenix, Ariz.	-	-	30	730
Pueblo, Colo.	-	-	10	250
Rio Grande Valley Mkt., Tex.	-	-	18	360

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R. J. REYNOLDS TOBACCO COMPANY

EXHIBIT V
Page Two

SUMMARY

SPANISH

Market	Criterion - 3 Sheet		Junior Posters - 6 Sheet	
	Number of Posters	Monthly Cost	Number of Posters	Monthly Cost
Sacramento, Calif.	-	$ -	22	$ 660
Salinas, Calif.	-	-	8	240
San Angelo, Tex.	-	-	6	126
San Antonio, Tex.	-	-	60	1,620
San Diego, Calif.	-	-	20	600
San Jose, Calif.	-	-	10	350
San Mateo, Calif.	-	-	6	210
Stockton, Calif.	-	-	10	300
Tampa-St. Petersburg, Fla.	20	205	25	625
Tucson, Ariz.	-	-	20	500

9/15/69

R. J. REYNOLDS TOBACCO COMPANY

SPANISH-SPEAKING MOVIE THEATRES
METROPOLITAN NEW YORK

Location	Theatre	Address	Approx. Wkly. Audience
Manhattan:	Azteca	1492 Madison Avenue	1,240
	Cosmo	176 East 116th Street	3,900
	Edison	2704 Broadway	2,600
	Jefferson	214 East 14th Street	5,860
	New Delancey	62 Delancey St.	7,300
	Olympia	Broadway & 107th Street	5,100
	San Juan	3950 Broadway	7,430
	Tapia	Broadway & 147th Street	1,900
Bronx:	Art	1077 Southern Boulevard	2,800
	Boulevard	Southern Boulevard & Westchester Ave.	9,000
	Freeman	Freeman & Southern Boulevard	7,400
	President	827 Westchester Avenue	4,500
	Prospect	851 Prospect Avenue	8,230
	Puerto Rico	490 East 138th Street	9,500
Brooklyn:	Coliseum	4th Avenue at 52nd Street	3,200
	Premiere	502 Sutter Avenue	5,800
	Rio Piedras	Broadway & Myrtle Avenue	6,900
	Terminal	4th Avenue & Dean Street	3,500
Queens:	Plaza	103-14 Roosevelt Avenue, Corona	1,900
New Jersey:	Colony	140 48th Street, Union City	2,400
	Fords	535 N. Brunswick Ave., Fords, P. Amboy	1,200
	Lyric	Landisville	730
	Tony	1212 Summit Avenue, Union City	1,400
	Treat	Orange & Broad Streets, Newark	1,670

9/15/69

50198 9809

ADVERTISING
EXECUTION

50198 9410

R. J. Reynolds

Spanish-Language Market Study

V. Advertising Execution

Although the national origin of the Spanish-speaking group is different in New York, Miami and the "Latin Cresent", advertising need not be specifically tailored for each segment. At least the major soap and detergent makers, and proprietary drug producers (home remedies to this market) usually advertise in a generic fashion to all the Spanish-speaking groups. However, if commercials are executed to appeal specifically to Cuban/Americans it does not follow that the same commercial would be effective with Mexican-Americans. The Benton & Bowles study noted that "patterns of usage among the Spanish-speaking people tend to differ from those of the total market, stemming from a basic reluctance on the part of the Spanish person to surrender his identity or traditions."

Spanish-speaking consumers are extremely loyal to brands advertised to them. But to win them takes more than simple translations of product labels from English to Spanish. It requires regular advertising in order to build up confidence in the product but once that confidence is gained, they can be expected to be loyal forever. Several studies indicate that the typical Spanish-speaking buyer prefers advertising to have copy with colorful

adjectives, presented in a friendly and warm tone; that use of easily remembered symbols for the products help sell them; and that he seeks the prestige and confidence of nationally advertised brand products.

Literal translations or the wrong music can set brand loyalty back for years. Adaptation, not translation, is of utmost importance. Copy must be carefully written to avoid a degenerate Spanish/English idiom. While this is usually acceptable when spoken, it is objectionable when used in print ads or as announcer copy. The musical idioms of the United States and Latin America are poles apart. The Spanish listener, whose radio or TV dial is loyally fixed at his Spanish-language station, is responsive primarily to the Latin sound. American sounds are ineffective.

Finally, to advertise most effectively, the key consideration is to determine the decisive versus the nondecisive motivations which influence this segment of the market. It generally is not as effective to aim at the Spanish-speaking consumer as such, as it is to aim at his motivation. The question then becomes what is his decisive motivation. Perhaps this can best be answered by the results of a beer study among white, Negro, and Puerto Rican consumers. Reaction to product benefits (lightness, body, color, etc.) were about the same. Differences occurred, however, when personal versus social motivations were considered. Puerto Ricans apparently placed little emphasis on the personal satisfaction of drinking beer, although

Negroes did. On the other hand, Puerto Ricans placed great emphasis on the social interaction associated with drinking beer, and Negroes did not.

Obviously, the point is that "social interaction" is perhaps one decisive motivation of Puerto Ricans and any attempt to sell them had better take this into primary consideration.

50198 9413

COMPETITIVE

50198 9414

R. J. Reynolds

Spanish-Language Market Study

VI. Competitive Advertising Expenditures

In 1969, P. Lorillard increased their budget by 73% over 1968. This increase was due primarily to the additional weight they placed in Spanish-language broadcast media and the use of billboards. On radio, they almost doubled and on TV they more than tripled their 1968 spending levels on Kent, Newport, and True. They reduced their Spanish-language newspaper expenditures by 40% and continued to have no advertising in magazines or billboards.

British American also increased their 1969 Spanish-language market budget. Their increase was 85% over 1968. Like P. Lorillard, the increase was in broadcast media. Radio expenditures were increased by about 20% and then TV effort was almost quadrupled. Kool's budget was more than doubled and Viceroy, while not advertised to this market in 1968, received the same weight as Kool in 1969.

American Tobacco, while slightly increasing its budget, eliminated its radio effort and put all its 1969 budget in TV.

R. J. Reynolds increased its Spanish-language media budget, from $277,000 to $296,000. Media weight was redistributed in 1969 so that Spanish-language radio received the heaviest weight.

During the same two-year period, total WINSTON's budget in this market increased by $15,000. The additional money was placed primarily in TV. Weight distribution among the media also changed. In 1969, WINSTON spent more in Spanish-language TV than in radio. In 1968, slightly more was spent in radio than TV. Also, in 1969, WINSTON Super King media weight was reduced by 65% and this effort was reassigned to WINSTON 85.

Philip Morris had no 1969 Spanish-language advertising effort. There were no 1969 expenditures by any cigarette firm in the magazines and only Kent and Newport utilized billboards. Other spending in the Spanish-language media appeared to be tokenism.

Spanish-Language Advertising Expenditures

(By Company/By Year)
(000)

	1968	1969
Total WINSTON	$191	$206
R. J. Reynolds	277	296
P. Lorillard	300	521
British American	96	178
American Tobacco	46	54
Philip Morris	20	-
Liggett & Myers	204	23

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R. J. Reynolds
WINSTON Spanish Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1965	W85	$ -	$ 6	$ 11	$ 47	$ -	$ 64
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ -	$ 6	$ 11	$ 47	$ -	$ 64
1966	W85	$ -	$ 6	$ 50	$ 50	$ -	$106
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ -	$ 6	$ 50	$ 50	$ -	$106
1967	W85	$ -	$ 4	$ 55	$ 37	$ -	$ 96
	WSKS	-	4	6	26	-	36
	WM	-	1	-	10	-	11
	Total	$ -	$ 9	$ 61	$ 73	$ -	$143
1968	W85	$ -	$ 4	$ 45	$ 48	$ -	$ 97
	WSKS	-	4	44	46	-	94
	WM	-	-	-	-	-	-
	Total	$ -	$ 8	$ 89	$ 94	$ -	$191
1969	W85	$ -	$ 7	$ 75	$ 86	$ -	$168
	WSKS	-	1	30	7	-	38
	WM	-	-	-	-	-	-
	Total	$ -	$ 8	$105	$ 93	$ -	$206

CGH/dm
8/22/69

50198 9417

Loews' Theatres
Spanish Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kent	$ -	$ 7*	$ 21	$ 44	$ -	$ 72
	Newport	-	7*	21	44	-	72
	True	-	7*	21	44	-	72
	Century	-	-	21	43	-	64
	Erik	-	-	20	-	-	20
	Old Gold	-	-	-	-	-	-
	Total	$ -	$ 21*	$104	$175	$ -	$300
1969	Kent	$ -	$ 2	$ 77	$ 84	$ 3	$166
	Newport	-	2	77	81	3	163
	True	-	9	77	84	-	170
	Century	-	-	-	-	-	-
	Erik	-	-	-	22	-	22
	Old Gold	-	-	-	-	-	-
	Total	$ -	$ 13	$231	$271	$ 6	$521

*Includes Temas.

British American
Spanish Advertising Expenditure History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kool	$ -	$ -	$ 19	$ 39	$ -	$ 58
	Viceroy	-	-	-	38	-	38
	Raleigh/ Belair	-	-	-	-	-	-
	Total	$ -	$ -	$ 19	$ 77	$ -	$ 96
1969	Kool	$ -	$ -	$ 46	$ 42	$ -	$ 88
	Viceroy	-	-	46	44	-	90
	Raleigh/ Belair	-	-	-	-	-	-
	Total	$ -	$ -	$ 92	$ 86	$ -	$178

CGH/dm
8/27/69

50198 9418

EXHIBIT I

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Campaign & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1965	R/R Brands																					
	WINSTON 85	$26	$ 7	$ -	$ 33	$ -	$41	$ 6	$ 47	$ -	$ -	$ 11	$ 11	$167	$53	$ 47	$267	$ -	$ -	$ -	$ -	$ 358
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	36	7	6	49	-	24	6	30	-	-	11	11	47	38	45	130	-	-	-	-	220
	TEMPO	-	9	-	9	-	56	-	56	-	-	-	-	-	23	-	23	-	-	-	-	88
	CAMEL	22	-	-	22	-	-	-	-	-	-	-	-	99	-	47	146	-	-	-	-	168
	TOTAL	$84	$23	$ 6	$113	$ -	$121	$12	$133	$ -	$ -	$ 22	$ 22	$313	$114	$139	$566	$ -	$ -	$ -	$ -	$ 834
1966	R/R Brands																					
	WINSTON 85	$31	$ 8	$ -	$ 39	$ -	$34	$ 6	$ 40	$ -	$ -	$ 50	$ 50	$227	$54	$ 50	$331	$ -	$ -	$ -	$ -	$ 460
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	41	7	6	54	-	16	6	22	-	-	50	50	653	7	61	721	59	-	-	59	906
	TEMPO	-	9	-	9	-	22	-	22	-	-	-	-	-	4	-	4	-	-	-	-	35
	CAMEL (R/F)	28	-	-	28	-	-	-	-	-	-	8	8	114	-	46	160	-	-	-	-	196
	TOTAL	$100	$24	$ 6	$130	$ -	$72	$12	$ 84	$ -	$ -	$108	$108	$994	$65	$157	$1,216	$59	$ -	$ -	$59	$1,597
1967	R/R Brands																					
	WINSTON 85	$ 17	$12	$ -	$ 29	$ -	$24	$ 4	$ 28	$ -	$ -	$ 55	$ 55	$ -	$19	$ 37	$ 56	$ -	$ -	$ -	$ -	$ 168
	WINSTON SKS	-	-	-	-	-	12	4	16	-	-	6	6	(I) 1	26	26	53	-	-	-	-	75
	WINSTON MENTHOL	17	-	-	17	-	4	1	5	-	-	-	-	(II) 297	21	10	318	-	-	-	-	340
	SALEM (85/SKS)	48	8	8	64	-	6	7	13	-	-	25	25	310	-	33	343	68	-	-	68	513
	TEMPO	-	2	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2
	CAMEL (R/F)	27	-	-	27	-	-	-	-	-	-	5	5	-	-	13	13	-	-	-	-	45
	TOTAL	$109	$22	$ 8	$139	$ -	$46	$16	$ 62	$ -	$ -	$ 91	$91	$598	$66	$131	$793	$68	$ -	$ -	$68	$1,143

(I) Special Negro effort - Chicago
WINSTON SKS $4[illegible].00
WINSTON MENTHOL $5,37[illegible].00
(II) WINSTON MENTHOL $[illegible] (Special Negro)

8/12/69
Revised
9/12/67

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EXHIBIT II

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines Negro	Magazines Jewish	Magazines Spanish	Magazines Total	Newspapers Negro	Newspapers Jewish	Newspapers Spanish	Newspapers Total	Television Negro	Television Jewish	Television Spanish	Television Total	Radio Negro	Radio Jewish	Radio Spanish	Radio Total	Outdoor Negro	Outdoor Jewish	Outdoor Spanish	Outdoor Total	GRAND TOTAL
1968	P/M Brands																					
	MINSTON 85	$ -	$ 6	$ -	$ 6	$ -	$25	$ 4	$ 29	$ -	$ -	$ 45	$ 45	$158	$35	$ 48	$241	$ -	$ -	$ -	$ -	$ 321
	MINSTON 100S	-	6	-	6	-	25	4	29	-	-	44	44	105	35	46	186	-	-	-	-	265
	MINSTON MENTHOL	51	-	-	51	-	-	-	-	-	-	-	-	155	-	-	155	-	-	-	-	206
	SALEM (85/100S)	42	10	9	61	-	17	7	24	-	-	16	16	347	-	61	408	-	-	-	-	509
	CAMEL (R/F)	42	-	-	42	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	42
	TOTAL	$135	$22	$ 9	$166	$ -	$67	$15	$82	$ -	$ -	$105	$105	$765	$70	$155	$990	$ -	$ -	$ -	$ -	$1,343
	Lorillard Brands																					
	Kent	$33	$ -	$ -	$ 33	$ 48	$20#	$ 7*	$ 75	$ -	$ -	$ 21	$ 21	$210	$ -	$ 44	$254	$ -	$ -	$ -	$ -	$ 383
	Newport	-	-	-	-	-	20#	7*	27	-	-	21	21	-	-	44	44	-	-	-	-	92
	True	30	-	-	30	60	20#	7*	87	-	-	21	21	210	-	44	254	-	-	-	-	392
	Century	-	-	-	-	10	-	-	10	-	-	21	21	-	-	43	43	-	-	-	-	74
	Kriik	-	-	-	-	-	-	-	-	-	-	20	20	-	-	-	-	-	-	-	-	20
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$63	$ -	$ -	$ 63	$118	$60#	$21*	$199	$ -	$ -	$104	$104	$420	$ -	$175	$595	$ -	$ -	$ -	$ -	$ 961
	British-American																					
	Kool	$53	$ -	$ -	$ 53	$ 20	$10#	$ -	$ 30	$ -	$ -	$ 19	$ 19	$350	$ -	$ 39	$389	$ -	$ -	$ -	$ -	$ 491
	Viceroy	-	-	-	-	4	40#	-	44	-	-	-	-	-	-	38	38	-	-	-	-	82
	Raleigh/Belair	-	-	-	-	-	20#	-	20	-	-	-	-	-	-	-	-	-	-	-	-	20
	TOTAL	$53	$ -	$ -	$ 53	$ 24	$70#	$ -	$ 94	$ -	$ -	$ 19	$ 19	$350	-	$ 77	$427	$ -	$ -	$ -	$ -	$ 593

#Includes National Publications.
*Includes Teens.

6/11/69
Revised 4/17

Sources for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) -
TV Magazines
Newspapers - Media Representatives

50198 9420

EXHIBIT II (Cont.)

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines Negro	Magazines Jewish	Magazines Spanish	Magazines Total	Newspapers Negro	Newspapers Jewish	Newspapers Spanish	Newspapers Total	Television Negro	Television Jewish	Television Spanish	Television Total	Radio Negro	Radio Jewish	Radio Spanish	Radio Total	Other Negro	Other Jewish	Other Spanish	Other Total	TOTAL
1968 Cont.	American Tobacco																					
	Tareyton	$34	$ -	$ -	$ 34	$ -	$10#	$ -	$ 10	$ -	$ -	$ 11	$ 11	$ 40	$ -	$ 11	$ 51	$ -	$ -	$ -	$ -	$ 106
	Pall Mall	35	-	-	35	48	10#	-	58	-	-	12	12	40	-	11	51	-	-	-	-	156
	Carlton	-	-	-	-	-	-	1*	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Lucky Strike	15	-	-	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	15
	Silva Thins	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$84	$ -	$ -	$ 84	$ 48	$20#	$ 1*	$ 69	$ -	$ -	$ 23	$ 23	$ 80	$ -	$ 22	$102	$ -	$ -	$ -	$ -	$ 278
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 25
	Marlboro	45	-	-	45	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	45
	Benson & Hedges	-	-	-	-	8	-	-	8	-	-	-	-	-	-	-	-	-	-	-	-	8
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$45	$ -	$ -	$ 45	$ 8	$ -	$ -	$ 8	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 78

Sources for competitive information

Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) - PIB
[illegible]
[illegible] - [illegible]

#Includes National Publications.
*Includes Texas.

8/11/69
Revised 9/17

50198 9421

EXHIBIT III

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969	RJR Brands																					
	WINSTON 85	$60	$ 7	$ -	$67	$ -	$27	$ 7	$ 34	$ -	$ -	$75	$ 75	$177	$35	$ 86	$298	$ -	$ -	$ -	$ -	$ [illegible]
	WINSTON SKS	33	7	-	40	-	27	1	28	-	-	30	30	-	35	7	42	-	-	-	-	[illegible]
	WINSTON MENTHOL	12	-	-	12	-	-	-	-	-	-	-	-	83	-	-	83	-	-	-	-	95
	SALEM (85/SKS)	106	6	9	121	-	14	7	21	-	-	19	19	151	-	55	206	-	-	-	-	[illegible]
	DORAL	-	15	-	15	-	21	-	21	-	-	-	-	-	12	-	12	-	-	-	-	48
	CAMEL (K/Y)	18	-	-	18	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18
	TOTAL	[illegible]	[illegible]	$ 9	[illegible]	$ -	[illegible]	[illegible]	[illegible]	$ -	$ -	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	$ -	$ -	$ -	$ -	$1,142
	Lorillard Theatres																					
	Kent	$47	$ -	$ -	$ 47	$ 2	$43	$ 2	$ 47	$ -	$ -	$ 77	$ 77	$187	$ -	$ 84	$271	$147	$ -	$ 3	$150	$ 592
	Newport	65	-	-	65	176	43	2	221	-	-	77	77	269	-	81	350	148	-	3	[illegible]	864
	True	-	-	-	-	-	-	9	9	-	-	77	77	87	-	84	171	-	-	-	-	257
	Century	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Kriik	-	-	-	-	-	-	-	-	-	-	-	-	-	-	22	22	-	-	-	-	22
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$112	$ -	-	$112	$178	$86	$13	$277	$ -	$ -	$231	$231	$543	$ -	$271	$814	$295	$ -	$ 6	$301	$1,735
	British-American																					
	Kool	$ 87	$ -	$ -	$ 87	$ 31	$ -	$ -	$ 31	$ -	$ -	$ 46	$ 46	$599	$ -	$ 42	$ 641	$ -	$ -	$ -	$ -	$ 805
	Viceroy	68	-	-	68	5	27	-	32	-	-	46	46	349	-	44	393	-	-	-	-	539
	Raleigh/Belair	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$155	$ -	$ -	$155	$ 36	$27	$ -	$ 63	$ -	$ -	$ 92	$ 92	$948	$ -	$ 86	$1,034	$ -	$ -	$ -	$ -	$2,344

[illegible]
Negro Magazine (Ebony)
[illegible]

8/11/69
Revised 9/17

EXHIBIT III (Cont.)

P. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969 Cont.	American Tobacco																					
	Tareyton	$ 42	$ -	$ -	$ 42	$ -	$ 10	$ -	$ 10	$ -	$ -	$ 18	$ 18	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 166
	Pall Mall	48	-	-	48	81	10	-	91	-	-	18	18	-	-	-	-	-	-	-	-	157
	Carlton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lucky Strike	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Silva Thins	42	-	-	42	-	-	-	-	-	-	18	18	-	-	-	-	-	-	-	-	60
	TOTAL	$132	$ -	$ -	$132	$ 81	$ 20	$ -	$101	$ -	$ -	$ 54	$ 54	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 383
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 11	$ -	$ 23	$ 34	$ -	$ -	$ -	$ -	$ 37
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	-	-	-	-	1
	TOTAL	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 12	$ -	$ 23	$ 35	$ -	$ -	$ -	$ -	$ 38
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Marlboro	-	-	-	-	1	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Benson & Hedges	90	-	-	90	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	90
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lido	-	-	-	-	-	-	-	-	-	-	-	-	9	-	-	9	-	-	-	-	9
	TOTAL	$ 90	$ -	$ -	$ 90	$ 1	$ -	$ -	$ 1	$ -	$ -	$ -	$ -	$ 9	$ -	$ -	$ 9	$ -	$ -	$ -	$ -	$ 100

Sources: For competitive information:
Jewish - Joseph Jacobs Organization
Negro Magazines (Ebony) - [illegible]
[illegible]
[illegible]

8/11/69

Revised 9/17

50198 9423

JEWISH MARKETS

50198 9424

R. J. Reynolds

Jewish Market Study

I. Profile of the Jewish Market

A. Population

B. Income/Employment

C. Education

D. A Jewish Renaissance

II. Marketing Results of U. S. Companies

III. Media Planning Implications

A. Jewish Media Usage Rationale

B. Media Analysis

1. Print

2. Radio

3. Other

IV. Media Directory

A. Radio

B. Newspaper

C. Magazines

V. Execution Development

VI. Special Merchandising

VII. Competitive Advertising Expenditures

50198 9426

R. J. Reynolds

Jewish Market Study

I. Profile of the Jewish Market

The large majority of Jewish people in the United States today are the progeny of emigrants from central and eastern Europe who arrived in great waves at the turn of the 20th century.

Like Jews who migrated to many other lands, they possessed unbounded energy and ambition but no money—a combination which led them into low-investment business such as food and drug wholesaling and retailing, real estate operations and all phases of the garment industry where they and their families have prospered.

Jewish passion for education and professionalism is, of course, historical; and as this passion found expression in their children, the next generation brought forth a proliferation of lawyers, doctors, dentists, accountants, and teachers.

A. Population

The latest Jewish population count in the United States in 1967 was estimated at about 5,800,000. In 1966, the total Jewish population in the United States was estimated at 5,720,000. The average annual growth rate for the decade 1956 to 1966 was just under one percent (1%). This compares with the average annual growth rate of 1.5% for the U. S. general population in the same decade.

- More than 95% of the estimated U. S. Jewish population is distributed in urban areas. More than a quarter of the city population of New York is Jewish and over half (54%) of the estimated total Jewish population in the U. S. resides in the New York/Northeastern New Jersey standard consolidated area.* The 971,700 Jewish families represents 22.8% of the 4,261,800 families in the area and the largest single cultural group. This huge concentration of Jews - 3,150,000 - is the greatest that has existed in thousands of years of Jewish history and accounts for 25% of the world's Jewish population. While the city and surrounding suburban counties together include over half of the nation's Jews, almost all the rest have once lived in the city, will at some time live there, or have parents or children who live there. It becomes obvious, therefore, that the success or failure of a brand in the New York marketplace is closely related to its acceptance within the Jewish community.

Adding this area's population to the estimates for the nine next largest Jewish communities, we find the combined total to be over 4,934,500 or 85.5% of the total estimated Jewish population in the United States.

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*10-county area (source: U. S. Bureau of Census) New York, Bronx, Kings, Queens, Richmond, Westchester, Nassau, Bergen, Essex, Hudson.

JEWISH POPULATION

TOP 10 JEWISH URBAN AREAS

January 1, 1968

Rank	Area	Pop[illegible]
1	New York, N. Y.	3,15[illegible]
2	Los Angeles, Calif.	50[illegible]
3	Philadelphia, Pa.	330,
4	Chicago Metro Area	269,
5	Boston, Mass.	185,
6	Miami, Fla.	130,
7	Washington, D. C.	100,
8	Baltimore, Md.	100,
9	Cleveland, Ohio	85,[illegible]
10	Detroit, Mich.	85,[illegible]
	Total:	4,9[illegible]4,5[illegible]

B. Income/Employment

As the Jewish population, in large part, becam[illegible] born and college-oriented, there was an upward [illegible] their occupational status. Conversely, statistics [illegible] the U. S. Census show that the foreign-born Jewish po[illegible] have a much larger percentage with lower educational attainments and occupational levels than the native born. The latest estimated median income for Jewish families, in 1964, was about $8,500. This compares with the less median income of $7,700 for the total U. S. population as reported by Fortune.

*See Footnote, Page 2

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In addition to its size and concentration in the New York area, the Jewish market is a high income group. For example, the 1969 Pulse report stated that 29.2% of the New York Jewish households reported incomes of $15,000 and over as compared to only 9.6% of the non-Jewish households; 59.9% have incomes over $10,000 a year versus 26.8% of non-Jewish families. At the lower end of the economic span, only 19.7% of the Jewish households reported incomes less than $7,500 as compared with 49.1% of those in non-Jewish households.

U. S. Census tables show that college-educated Jews prefer to enter occupations where self-employment was possible, e.g. doctors, lawyers, and accountants. Similarly, an analysis of Jews in the managers, proprietors, and officials categories as defined by the Census also show a disproportionately large number of proprietors (in many cases, proprietorship may have been on a relatively modest economical level, e.g. small retail stores) rather than managers and officials. However, the distinctions of occupations preferred by Jews are most significant when the professional category is separated by "salaried workers" and "self-employed". In the "employed college graduate" category 39% of the Jews are salaried professional workers as compared with 53% of the total population. While 19% of the Jews were "self-employed" professionals, only 10% of the total population was self-employed. Similarly, an analysis of the managers and proprietors category showed

virtually identical proportions of salaried and self-employed for Jews while for the total population the salaried proportion was twice that of the self-employed.

The median income figures and the high levels of education and professional occupations indicate that Jews are a high income group.

C. Education

A characteristic of Jewish communities, which appears to be independent of their size or location, is the high level of secular education. As a minority group, they have perhaps the highest level of educational attainment; education levels, of course, are highly correlated with socio-economic status. For the younger age group, which may be indicative of future trends, Boston estimated that 78% of those between the ages of 21 and 29 have attended college; Milwaukee estimates that 83% of those aged 20 to 34 attended. In New York, more than 80% of those of college age are currently enrolled in college, and while more than 25% of the population of New York's central city is Jewish, they constitute 50% of all college graduates in the New York area.

D. A Jewish Renaissance

The founding of the State of Israel 21 years ago was a profound event which touched off a "renaissance" in Judaism. The more recent 6-day war and the continued unrest in the Middle East have undoubtedly contributed to a further

awareness and pride among Jews of their heritage.

Significant evidence that Jewish customs and traditions are undergoing a revival is found in Jewish homes. There has been a vast growth in the enrollment of Jewish school children which is indicative of a greater involvement by younger Jewish families with Judaism. In 10 years, Jewish school enrollment, estimated to be 600,000 in New York in 1968, has doubled while the Jewish population growth has been less than 1%. There also has been expanded construction of synagogues and community centers. The latter serves Jewish families from childhood throughout their adult lives and provides nursery school facilities, religious education, scouting activities, teenage and young adult programs, cultural activities and organizational work involving Hadassah, B'nai B'rith, and others.

The Kosher food business has grown rapidly in the past few years. This is evidenced not only by the growing number of supermarket items with various Kosher signs on the labels but also by a growing number of Kosher caterers in the large metro areas.

The 1969 Pulse Study also provides some indication of the growth/continuation of Jewish customs and traditions:

- 56.4% of Jewish Families maintain 2 sets of dishes and utensils for meat and dairy meals.
- 77.4% purchase Kosher meat and poultry.

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- 55.1% observed the lighting of candles on Friday night for the Sabbath.
- 85.3% light candles in December on Chanukah.

There are other trends evolving among American Jews which at this point, cannot be fully assessed in terms of their effect on Jewish traditions and religious observances. The most important change is perhaps the Jewish population movement from the central cities to the suburbs. Many feel that it is inevitable that they will assimilate with the general population through social contacts and intermarriage and the old barriers among Orthodox, Conservative and Reform groups will gradually be eliminated. However, most feel that the "Jewish spirit" will never be extinct as Albert Vorspan wrote in the preface of My Rabbi Doesn't Make House Calls.

> "Every few months a national magazine comes out with a bombshell article on how American Jews are vanishing. The article always cites the low Jewish birth rate, the growing rate of intermarriage and the alienation of Jewish college students. The reaction is always the same. Jews panic. The magazine sells out by morning. Jewish masochism is briefly gratified. For months, the synagogue pulpits of the land resound with dire sermons on the imminent disappearance of the Jews while the congregants, experiencing a mild sensation of deja vu, sigh sadly, facing the end-once again-

with resigned fortitude. Then the article vanishes; the Jews plod on.

"This has been going on for three thousand years. It will go on for another three thousand years. If you are a gambling man, put your chips on the Jews. No people has been counted out so often-and always outlives those who bet against them. Believe it-Jews are here for the duration. They are the greatest survivors in history. (Have you seen any Babylonians lately?)"

R. J. REYNOLDS

JEWISH POPULATION

TOP 30 JEWISH URBAN AREAS

Rank	Area	Population
1	New York, N. Y.	3,150,000*
2	Los Angeles, Calif.	500,000
3	Philadelphia, Pa.	330,500
4	Chicago Metro Area	269,000
5	Boston, Mass.	185,000
6	Miami, Fla.	130,000
7	Washington, D. C.	100,000
8	Baltimore, Md.	100,000
9	Cleveland, Ohio	85,000
10	Detroit, Mich.	85,000
11	San Francisco, Calif.	73,000
12	St. Louis, Mo.	57,500
13	Montgomery County, Md.	52,700
14	Pittsburgh, Pa.	45,000
15	Cincinnati, Ohio	27,500
16	Hartford, Conn.	26,000
17	Buffalo, N. Y.	25,000
18	Milwaukee, Wisc.	24,000
19	Indianapolis, Ind.	22,900
20	Denver, Colo.	22,000
21	Kansas City, Mo.	22,000
22	Minneapolis, Minn.	22,000
23	Rochester, N. Y.	21,500
24	Prince Georges Co., Md.	21,500
25	Dallas, Tex.	20,000
26	Houston, Tex.	20,000
27	New Haven, Conn.	20,000
28	Providence, R. I.	19,600
29	Oakland, Calif.	18,000
30	Atlanta, Ga.	16,000

*10 county area - New York, Bronx, Kings, Queens, Richmond, Westchester, Nassau, Bergen, Essex, Hudson.

Source: U. S. Bureau of Census; 1968 American Jewish Yearbook

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R. J. Reynolds

Jewish Market Study

II. Marketing Results of U. S. Companies

There is, of course, no question that general advertising in the volume done by WINSTON is seen and/or heard by all groups, including Jewish. However, there is clear evidence to show that good advertising aimed exclusively at Jewish people produces far better results than general advertising is able to obtain from those same Jewish families. Pulse figures* on WINSTON in New York City bear this out. The following figures indicate the excellent progress of WINSTON in the Jewish market as compared with the market remainder, as well as showing WINSTON's overall growth in this area during the last four years.

TOTAL WINSTON BRANDS

Year	Non-Jewish	Jewish
1966	6.3%	10.3%
1967	7.2%	11.4%
1968	7.6%	13.4%
1969	8.2%	14.5%

The following figures from a recent Pulse study show how other products merchandised and advertised to the Jewish family do so much better than their major competitors who do not use Jewish promotion.

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*Pulse figures are acceptable only when used to indicate market trends and brand relationships.

	Non-Jewish	Jewish
*MY-T-FINE PUDDING	27.0%	70.0%
Jell-O Pudding	20.1%	14.1%
*MAXWELL HOUSE	32.5%	52.8%
Savarin	10.4%	11.9%
*ANACIN	35.4%	62.0%
Bufferin	27.8%	30.1%
*CHUN-KING	8.1%	12.5%
La Choy	6.4%	6.8%
*AEROWAX	4.9%	13.4%
Beacon	20.3%	11.0%

(*Advertised in Jewish Media)

Gillette has been running a series of print ads featuring well-known personalities. None of the men used are identified as being Jewish, nor does the headline or text have any Jewish connotation. Yet, the ads are credited with helping Gillette improve its market penetration among the readers of these papers and magazines. According to a Pulse report, Gillette Super Stainless Blades are in 39% of the Jewish homes in the New York metropolitan area this year compared with 30% two years ago. The share of its closest competitor in this market, Wilkinson, remained constant in this same period at about 25%.

There is definite evidence that those firms which have purposely attempted to influence Jewish consumers with specialized advertising and promotion have been successful in reaching and selling them far more effectively than their competitors who have been content to reach Jewish people only through general media and promotion.

MEDIA PLANNING

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R. J. Reynolds

Jewish Market Study

III. Media Planning Implications

A. Jewish Media Usage Rationale

The 1969 Pulse study indicates that Jewish families watch substantially less television than do non-Jewish families. In addition, far fewer Jewish families watch TV at a key hour of the day. Even more significant, 43% of those families interviewed spent no time "watching television yesterday" as compared with only 15.7% of the non-Jewish families. These significantly lower viewing levels in Jewish homes must, to a large degree, be a function of higher income and educational levels rather than the fact that they are Jewish. Nevertheless, the absence in 43% of the Jewish homes of the sight, sound, motion advertising medium, TV, makes it impossible to rely on TV as the primary medium of reach or influence.

There is no quantitative rationale which demands the use of Jewish-oriented media merely to reach the Jewish consumer. However, most media basically reflect the interests, desires and aspirations of their primary audience, which is largely white, Anglo-Saxon, Protestant. Reclassification of these media as "WASP-oriented" would be far more accurate and functional than their most frequent classification as "general" media. This is not to imply that Jewish

audiences "turn off" general advertising. They don't. But to be influential, advertisers should use customer-oriented media in which the 5.8 million American Jews can truly identify with in the same manner as other consumers do with media oriented to them.

Jewish media serve the special needs and interests of this large, culturally distinct and generally affluent market. It fills the "information gap" which exists in general market media by providing news, articles and features about Israel, Jews throughout the world, political news of importance to Jewish families, and Jewish social news. This is information that Jewish people want but cannot get from any other media.

Jewish media also provide a platform for specially developed Jewish copy appeals for maximum effectiveness in selling the Jewish market. More importantly, it provides 100% non-waste circulation by its isolation/penetration of Jewish homes only. Jewish consumer media also function to some degree as "trade" media since a substantial portion of the grocery and drug trade are Jewish, especially in New York; through the pages of the Jewish press they are alerted to special Jewish promotional efforts.

If brand awareness is the primary advertising objective, then national advertising does generally reach this audience. This is especially true with brands which have the media mix and advertising budget of WINSTON. However, if

the key objective is to sell more of Product A to more Jewish consumers, then they must be communicated with, not merely reached.

The point here is that the widespread assumption that "general" media reaches the Jewish consumer anyway and that special campaigns directed to them are not necessary, is a doubtful premise. To the extent that it is true, "reached" and "persuaded" are two entirely opposite marketing objectives. Jewish media is not important for coverage. Its strength lies in the emotional influence it has on its audience. It should be viewed by marketing strategists on the basis of "audience delivered" (this one numbers 5,8[illegible],000) rather than, as often is the case, a non-essential adjunct of general media.

Jewish media advertising through the use of specialized copy not only brings the strongest possible message to Jewish people, but it does so in media where none of the circulation goes to any other group, and in media which offsets the weakness of television in Jewish homes.

B. Media Analysis

1. Print

Jewish media is almost totally print. There are approximately 100 publications and over 90% of them are printed in English (10% are in Yiddish). There are 69 newspapers serving local audiences on a weekly basis in 30 different states. Also, there are 31

national publications, mostly monthlies. Since 1948, the year Israel was founded, the combined circulation of Jewish publications has doubled every 10 years. This thriving media picture is a direct reflection of the modern Jewish market itself, growing in population quantity and in "Jewish quality", as postwar families were formed with children to rear in the Jewish tradition and in a national climate of general religious revival and mass educational opportunities.

Recent studies have shown that Jewish publications enjoy high readership and most of them meet the highest standards of editing as well as printing. They deal intimately and in detail with the activities, hopes and aspirations of Jewish people—locally, nationally and internationally. Jewish print is not a religious medium; rather, it is concerned with Jewish culture and Jewish life. It offers Jewish audiences (about 75% of all Jewish families are reached with this medium) in a Jewish frame of mind when they read the publications and who, as a result, can be sold best with specialized, rather than generic, print executions.

2. Radio

Jewish radio programming is available in such cities as Hartford, Philadelphia, Miami, Boston, and Los Angeles, but the most effective programming is in New York City.

While two New York stations have Jewish programming, WEVD (AM & FM) does the major share, about 50%. They have regular Jewish programs beginning in early morning and ending at 1:30 p.m. five days a week and other Jewish programs on Sunday. Daily messages and programs aimed at the Jewish audience include Jewish music, including liturgical; Jewish variety/entertainment shows; women programs which feature Jewish home economics, entertainment and interviews with people of special interest to a Jewish housewife audience; and Jewish talk and record shows.

3. Other

There are no TV stations with Jewish-oriented programming and outdoor/transit efforts are believed to be ineffective.

R. J. Reynolds

Jewish Market Study

IV. Media Directory

Print vehicles (newspapers and magazines) are the primary media available to reach this ethnic market.

A. Radio

In broadcast, WEVD, New York is the only station worthy of consideration, with specific programming directed to the Jewish market. This station (5,000 watts, 1330 kc) broadcasts 24 hours daily, with a variety of programming appealing to all ethnic groups (excluding Spanish and Negro). Particular programming emphasis is towards the Jewish and Italian segments of New York's population.

B. Newspaper

Of the 69 newspapers with editorial directed toward the Jewish market, 32 of them have a circulation of under 10,000 and an additional 11 have circulations ranging between 10,000 to 15,000.

Exhibit I lists, by market, the Jewish population and the newspapers available, with publication day, circulation, open line rate and milline rate.

C. Magazines

There are 31 Jewish magazines published in the U. S. Most of these publications are issued on a monthly or bi-monthly basis.

Hadassah Magazine is the most powerful single Jewish magazine. It is the official publication of Hadassah, the largest Jewish women's organization. Hadassah magazine has a national circulation of 349,000 reaching almost one out of every four Jewish homes. (Median income of $12,611 with 62.7% college educated.)

Exhibit II lists the Jewish magazines, frequency of issue, open rate cost for a page B&W and a page 4-color, as well as CPM circulation.

EXHIBIT I
Page One

R. J. REYNOLDS TOBACCO COMPANY

JEWISH NEWSPAPERS

Market	Jewish Pop.	Publication	Pub. Date	Circ.	Open Li. Rate	Milline
Albany, N. Y.	12,500	Jewish World	Thurs.	5,886	$ .20	$ 33.49
Atlanta, Ga.	16,000	Southern Israelite	Fri.	4,200	.40	93.62
Atlantic City, N. J.	10,000	Jewish Record	Fri.	3,470	.20	56.60
Baltimore, Md.	100,000	Jewish Times	Fri.	16,500	.40	23.83
Birmingham, Ala.	9,500	Jewish Monitor	Fri.	3,288	.24	71.75
Boston, Mass.	176,000	Jewish Advocate	Thurs.	23,919	.50	20.55
		Jewish Times (Brookline)	Thurs.	10,500	.20	18.72
Buffalo, N. Y.	25,000	Buffalo Jewish Review	Fri.	13,500	.20	14.50
Camden, N. J.	14,965	Voice	Bi-Weekly	5,600	.14	24.52
Chicago, Ill.	269,000	Sentinel	Thurs.	30,029	.50	16.37
Cincinnati, Ohio	27,500	American Israelite	Thurs.	8,600	.36	41.15
Cleveland, Ohio	85,000	Jewish News	Fri.	17,250	.40	22.79
		Heights Sun Press(Cleve. Hts)	Thurs.	44,168	.30	6.68
		Hillcrest Sun Messenger	Thurs.	22,984	.25	10.69
Columbus, Ohio	10,000	Ohio Jewish Chronicle	Thurs.	3,000	.18	58.95
Dallas/Ft. Worth, Tex.	22,600	Texas Jewish Post	Thurs.	7,500	.36	47.18
Dayton, Ohio	7,000	Dayton Jewish Chronicle	Thurs.	6,390	.18	27.69
Denver, Colo.	22,000	Intermountain Jewish News	Fri.	4,500	.29	63.35
Detroit, Mich.	85,000	Jewish News	Thurs.	15,500	.35	22.20
Essex County, N. J.	100,000	Jewish News	Fri.	25,174	.40	15.62
Greensboro, N. C.	8,000	American Jewish Times Outlook	Monthly	5,000	.35	68.81
Houston, Tex.	20,000	Jewish Herald Voice	Thurs.	4,300	.20	45.72
Hudson/Bergen Ctys.	111,000	Jewish Standard	Fri.	7,150	.28	38.50
Indianapolis, Ind.	22,890	Jewish Chronicle	Fri.	10,000	.15	14.75
Jacksonville, Fla.	4,500	Southern Jewish Weekly	Fri.	28,500	.40	13.80
		Jacksonville Chronicle	Fri.	25,000	.21	8.26
Kansas City, Mo.	22,000	Jewish Chronicle	Fri.	11,500	.25	21.37
Las Vegas, Nev.	2,000	Israelite	Fri.	9,500	.29	30.01
Los Angeles, Calif.	500,000	B'nai B'rith Messenger	Fri.	49,994	.38	7.47
		Heritage	Thurs.	13,575	.39	28.24
		Jewish Voice	Fri.	30,200	.35	11.39
Memphis, Tenn.	9,000	Hebrew Watchman	Thurs.	2,196	.20	89.53
Miami, Fla.	130,000	Jewish Floridian	Fri.	20,000	.30	14.75

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R. J. REYNOLDS TOBACCO COMPANY

JEWISH NEWSPAPERS

Market	Jewish Pop.	Publication	Pub. Date	Circ.	Open Li. Rate	Milline
Milwaukee, Wisc.	24,000	Jewish Chronicle	Fri.	12,800	$ .30	$ 23.04
Minneapolis, Minn.	20,500	American Jewish World	Fri.	15,378	.40	25.57
New Orleans, La.	10,150	Jewish Civic Press	Monthly	2,500	.26	102.23
New York City, N. Y.	2,381,000	American Examiner	Thurs.	91,550	.70	7.52
		Aufbau	Fri.	29,639	.50	16.58
		Der Yid	Bi-Weekly	7,600	.25	32.34
		Day-Jewish Journal	Daily	43,340	.56	12.70
		Jewish Forward	Daily	53,346	.56	10.32
		Jewish Press	Fri.	152,026	.75	4.85
		L. I. Jewish Press	Monthly	20,475	.50	24.00
		Westchester Jewish Tribune	Monthly	6,450	.40	60.96
		Nassau Herald	Thurs.	11,000	.32	28.60
		Rockaway Journal	Tues.	6,000	.32	52.43
Oakland, Calif.	18,000	California Jewish Record	Semi-Monthly	10,406	.36	34.01
Omaha, Nebr.	7,000	Jewish Press	Fri.	3,100	.11	37.10
Paterson, N. J.	15,000	American Post	Wed.	3,500	.115	32.30
Philadelphia, Pa.	330,500	Jewish Exponent	Fri.	66,132	.50	7.43
		Jewish Times	Thurs.	34,220	.40	11.49
Pittsburgh, Pa.	45,000	Jewish Chronicle	Thurs.	15,540	.50	31.63
Portland, Ore.	8,000	Jewish Review	Monthly	3,000	.36	117.96
Providence, R. I.	19,600	Jewish Herald	Fri.	13,251	.24	17.81
St. Louis, Mo.	57,500	Jewish Light	Bi-Weekly	15,450	.34	21.63
St. Paul, Minn.	10,000	Jewish News	Bi-Weekly	2,950	.25	83.31
San Antonio, Tex.	6,000	B'nai B'rith Voice	Monthly	10,500	.36	33.70
San Francisco, Calif.	73,000	Jewish Community Bulletin	Fri.	14,605	.30	20.19
Savannah, Ga.	3,500	Jewish News	Monthly	1,300	.36	272.21
Seattle, Wash.	12,500	The Transcript	Semi-Monthly	4,200	.21	49.15
Springfield, Mass.	10,835	Jewish Weekly News	Thurs.	7,335	.20	26.80
Toledo, Ohio	7,000	Jewish News	Monthly	2,404	.25	102.23
Trenton, N. J.	9,500	American Jewish Life	Monthly	9,200	.26	27.78
		Jewish Community Reporter	Monthly	3,000	.27	88.47
Tucson, Ariz.	6,500	Arizona Post	Fri.	2,650	.14	51.93
Wilmington, Del.	8,700	Jewish Voice	Bi-Weekly	3,000	.12	39.32
Worcester, Mass.	10,000	Jewish Civic Leader	Thurs.	18,555	.30	15.89
Youngstown, Ohio	5,500	Jewish Times	Fri.	8,989	.11	12.03

EXHIBIT II
Page One

R. J. REYNOLDS TOBACCO COMPANY

MAGAZINES

JEWISH

Publication	Frequency	Circulation	Page B&W Cost*	Page B&W CPM#	Page 4-C Cost*	Page 4-C CPM#	Closing Dates
American Zionist	Monthly	47,500	$ 420	$ 8.84	$ -	$ -	-
Bitzaron	Monthly	18,440	200	10.85	-	-	-
Brotherhood	Bi-Monthly	70,000	400	5.71	500	7.14	One Month in advance
Commentary	Monthly	65,000	600	9.23	1050	16.15	1st of mo. prec. issue mo.
Congress Bi-Weekly	Bi-Weekly	35,666	300	8.41	-	-	-
Dimensions	Quarterly	64,500	500	7.75	-	-	-
Hadassah Magazine	Monthly	349,329	2350	6.73	3000	8.59	1st of mo. prec. issue mo.
Hadoar	Friday	5,200	297	57.12	-	-	-
Histadrut Photo News	Monthly	43,839	NA	-	NA	-	-
Israel Investors Report	Bi-Monthly	22,500	NA	-	NA	-	-
Israel Magazine	Monthly	126,000	890	7.06	1090	8.65	1st of mo. prec. issue mo.
Jerusalem Post	Monday	40,000	NA	-	NA	-	-
Jewish Frontier	Monthly	9,225	NA	-	NA	-	-
Jewish Guardian	Monthly	15,000	NA	-	NA	-	-
Jewish Homemaker	Bi-Monthly	40,000	300	7.50	-	-	-
Jewish Horizon	Quarterly	10,000	NA	-	NA	-	-
Jewish Observer	Monthly	16,250	200	12.31	-	-	-
Jewish Parent	Quarterly	12,000	NA	-	NA	-	-
Jewish Life	Bi-Monthly	10,000	NA	-	NA	-	-
Jewish Spectator	Monthly	18,000	300	16.67	-	-	-
Jewish Veteran	Monthly	100,000	500	5.00	-	-	-
Land and Life	Bi-Monthly	25,000	NA	-	NA	-	-
Midstream	Monthly	12,000	200	16.67	-	-	-
Mizrachi Women	Monthly	23,500	700	29.79	-	-	-
National Jewish Monthly	Monthly	214,748	875	4.07	1475	6.87	1st of mo. prec. issue mo.
Panim el Panim	Wednesday	35,000	NA	-	NA	-	-
National Jewish Post	Friday	14,517	500	34.44	-	-	-
Synagogue Light	Monthly	16,900	200	11.83	-	-	-

*Open Rate
#CPM based on circulation

NA - Not Available

[illegible] Media Department

R. J. REYNOLDS TOBACCO COMPANY

MAGAZINES

JEWISH

Publication	Frequency	Circulation	Page B&W Cost*	Page B&W CPM#	Page 4-C Cost*	Page 4-C CPM#	Closing Dates
United Synagogue Review	Quarterly	240,000	$ 750	$ 3.13	$ NA	$ -	
Women's League Outlook	Quarterly	165,000	280	1.70	NA	-	
Young Israel Viewpoint	Monthly	28,897	450	15.57	NA	-	

NA - Not Available
*Open Rate
#CPM based on circulation

9/15/69

William Esty Company Media Department

R. J. Reynolds

Jewish Market Study

V. Execution Development

Advertising to the Jewish consumer can be adapted from most general media campaigns. It can be used most effectively by tying in some important facet of Jewish life and culture to the national campaign.

Today's Jewish market is peopled with a very "in" younger generation. They have the economic resources to buy and to do what they wish. They take advantage of the Kosher resort areas in the Catskills, the Jersey, Florida, and Carribean beaches, the theater, racetracks and favorite dining spots. These upscale, social outlets offer a broad advertising environment for selling to Jewish people.

Settings and situations should be current and "in" and be readily identified as "Jewish". Photography should catch reality and conviction. Principals, in appearance and fashion, should be selected to reflect an upscale and "with it" atmosphere. They should not be heavy "Jewish" types although people who are obviously "non-Jewish" will be unacceptable also. Their dress should be reasonably high-styled to fit the situation. Radio copy also should follow the strategy described above.

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R. J. Reynolds

Jewish Market Study

VI. Special Merchandising

Since 1961, R. J. Reynolds has recognized the existence and importance of the separate and distinct Jewish market by advertising its products with specially directed copy appeals, promotions, sampling, and other merchandising activities. This has been accomplished through the utilization of the Joseph Jacobs Organization. While compensated as Jewish media sales representatives, they have functioned as a Reynolds advertising agency at no extra cost.

Since 1919, they have served as a Jewish marketing/media specialist and have worked with manufacturers, service organizations, and agencies to stimulate sales among Jewish consumers, especially in New York City. They have capabilities in creative and production efforts relative to distinct Jewish directed copy appeals. They operate one of two ways:

- Provide advice and counsel on creative approaches with the regular ad agency producing the ad, or
- Create and produce ads billing regular agencies for out-of-pocket expenses and taking no commission.

In order to make Jewish media advertising more effective, Reynolds uses the regular merchandising support offered by Jacobs. They maintain a fourteen man merchandising force

that covers New York's major Jewish areas on a year-round basis. They call on grocery and drug chains, co-ops, and independents to put up display material, maximize distribution, and to assure consistent and effective promotional cooperation. This unique manpower is available to all Reynolds products promoted in Jewish media at no extra cost. Jacobs' services are available to no competitors. In addition to this regular support, they offer complete merchandising services for a fee.

Joseph Jacobs men carry and put up regular display material supplied by the advertiser. However, it is generally more effective to prepare special display material if the Jewish media advertising carries a special Jewish theme. This theme then can be reinforced in special display material which will be prepared on request. The major Jewish holidays are excellent subjects for special merchandising activities.

Due to the great volume of media space placed by Joseph Jacobs, it has excellent relations with the Jewish publications and continually gains free publicity. As a result, Jewish media promoted products receive strong additional publicity, a service provided by Jacobs at no cost.

Exhibit I

R. J. Reynolds

Jewish Market Study

Jewish Market Merchandising Options

Joseph Jacobs' Regular Merchandising Support

In order to make Jewish media advertising more effective, the Joseph Jacobs Organization maintains two merchandising crews who cover New York's major Jewish areas on a year round basis. Each crew has six men, and a working supervisor. Each man in his own familiar territory works on a store by store "down-the-street" coverage of retail outlets, grocery and drug chains, cooperatives and independents. The men are strategically routed and closely supervised. This unique manpower is available to all RJR products promoted in Jewish media at no extra cost.

More specifically, the Joseph Jacobs merchandising men:

- Check stock.
- Rotate older stock.
- Pack out back room merchandise.
- Check price structure and obtain approval for corrections.
- Work for increased facings, floor and window displays.
- Put up display material.
- Talk up product stories and advertising efforts.
- Inform outlets of special promotions, features, etc.
- Sell dealers on the importance of stocking and displaying your product.

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- When stock outs exist in chains or co-ops, attempt to set orders placed in chain book, or through co-operative warehouse.
- Submit complete reports of all services rendered.

R. J. Reynolds

Jewish Market Study

Joseph Jacobs Full Time Merchandising/Sales Option

It is possible to obtain the services of Joseph Jacobs merchandising/sales crews on a full time exclusive basis for special drives in New York's major Jewish marketing areas. In effect, for the period involved, a firm has a trained full-time specialized selling organization. There are more than 3,000 independents in these areas. Many of them are more important than the chains but, because of their size, seldom receive the merchandising attention that the Joseph Jacobs men can provide, especially to back up Jewish media advertising.

The Jacobs men pick up goods from wholesalers and sell for cash off the car, either obtaining original distribution or plugging distribution holes in established brands. These activities are coordinated with the firm's division managers. They perform a complete merchandising activity — arrange floor and shelf displays, push preferred stocks, talk up the Jewish media advertising and put up available display material. They also may be directed to do special work in chain outlets in addition to their off-car sales coverage. Here the men attempt to enter orders into the chain order book, maintain

correct shelf position, increase facings, put up display material, pack out merchandise and, in general, effect a better disposition of products. Prior to major Jewish holidays they assist in erecting Kosher departments. Written reports of this work are regularly submitted to the client. The charge for this service is $1,250 a week for six men and a working supervisor, including automobiles, insurance and taxes.

Whether or not Joseph Jacobs men are employed for the special full time services described above, all products promoted in Jewish media receive the regular Joseph Jacobs merchandising backup.

R. J. Reynolds

Jewish Market Study

VII. Competitive Advertising Expenditures

Two cigarette firms, Liggett & Myers and Philip Morris, eliminated their Jewish advertising budget in 1969. British-American reduced its budget by two-thirds and is only advertising Viceroy. While American Tobacco maintained its 1968 level, P. Lorillard increased its budget by 43%, or $26,000. Advertisements for True were halted and the Kent and Newport budgets each were doubled.

R. J. Reynolds increased its 1969 budget by $57,000, most of which went for the promotion of DORAL. Total WINSTON increased its budget marginally. Part of the increase was due to a Jewish radio effort for WSK-M in early 1969.

Marlboro had no Jewish effort and no firm used the outdoor medium.

Jewish Advertising Expenditures

(By Company/By Year)
(000)

	1968	1969
Total WINSTON	$132	$145
R. J. Reynolds	159	206
P. Lorillard	60	86
British American	70	27
American Tobacco	20	20
Philip Morris	5	-
Liggett & Myers	48	-

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R. J. Reynolds
WINSTON Jewish Advertising Expenditures History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1965	W85	$ 7	$ 41	$ -	$ 53	$ -	$101
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ 7	$ 41	$ -	$ 53	$ -	$101
1966	W85	$ 8	$ 34	$ -	$ 54	$ -	$ 96
	WSKS	-	-	-	-	-	-
	WM	-	-	-	-	-	-
	Total	$ 8	$ 34	$ -	$ 54	$ -	$ 96
1967	W85	$ 12	$ 24	$ -	$ 19	$ -	$ 55
	WSKS	-	12	-	26	-	38
	WM	-	4	-	21	-	25
	Total	$ 12	$ 40	$ -	$ 66	$ -	$118
1968	W85	$ 6	$ 25	$ -	$ 35	$ -	$ 66
	WSKS	6	25	-	35	-	66
	WM	-	-	-	-	-	-
	Total	$ 12	$ 50	$ -	$ 70	$ -	$132
1969	W85	$ 7	$ 27	$ -	$ 35	$ -	$ 69
	WSKS	7	27	-	35	-	69
	WM	-	-	-	7	-	7
	Total	$ 14	$ 54	$ -	$ 77	$ -	$145

CGH/dm
8/22/69

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Loews' Theatres
Jewish Advertising Expenditures History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kent	$ -	$ 20#	$ -	$ -	$ -	$ 20
	Newport	-	20#	-	-	-	20
	True	-	20#	-	-	-	20
	Century.	-	-	-	-	-	
	Erik	-	-	-	-	-	-
	Old Gold	-	-	-	-	-	-
	Total	$ -	$ 60#	$ -	$ -	$ -	$ 60
1969	Kent	$ -	$ 43#	$ -	$ -	$ -	$ 43
	Newport	-	43#	-	-	-	43
	True	-	-	-	-	-	-
	Century	-	-	-	-	-	-
	Erik	-	-	-	-	-	-
	Old Gold	-	-	-	-	-	-
	Total	$ -	$ 86	$ -	$ -	$ -	$ 86

#Includes National Publications

British-American
Jewish Advertising Expenditures History
By Year/By Brand/By Media
(000)

Year	Brand	Mag.	News.	TV	Radio	Od.	Total
1968	Kool	$ -	$ 10#	$ -	$ -	$ -	$ 10
	Viceroy	-	40#	-	-	-	40
	Raleigh/ Belair	-	20#	-	-	-	20
	Total	$ -	$ 70#	$ -	$ -	$ -	$ 70
1969	Kool	$ -	$ -	$ -	$ -	$ -	$ -
	Viceroy	-	27	-	-	-	27
	Raleigh/ Belair	-	-	-	-	-	-
	Total	$ -	$ 27	$ -	$ -	$ -	$ 27

#Includes National Publications

CGH/dm
8/27/69

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EXHIBIT I

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1965	RJR Brands																					
	WINSTON 85	$26	$ 7	$ -	$ 33	$ -	$41	$ 6	$ 47	$ -	$ -	$ 11	$ 11	$167	$53	$ 47	$267	$ -	$ -	$ -	$ -	$ 358
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	36	7	6	49	-	24	6	30	-	-	11	11	47	38	45	130	-	-	-	-	220
	TEMPO	-	9	-	9	-	56	-	56	-	-	-	-	-	23	-	23	-	-	-	-	88
	CAMEL	22	-	-	22	-	-	-	-	-	-	-	-	99	-	47	146	-	-	-	-	168
	TOTAL	$84	$23	$ 6	$113	$ -	$121	$12	$133	$ -	$ -	$ 22	$ 22	$313	$114	$139	$566	$ -	$ -	$ -	$ -	$ 834
1966	RJR Brands																					
	WINSTON 85	$31	$ 8	$ -	$ 39	$ -	$34	$ 6	$ 40	$ -	$ -	$ 50	$ 50	$227	$54	$ 50	$331	$ -	$ -	$ -	$ -	$ 460
	WINSTON SKS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	WINSTON MENTHOL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	SALEM 85	41	7	6	54	-	16	6	22	-	-	50	50	653	7	61	721	59	-	-	59	906
	TEMPO	-	9	-	9	-	22	-	22	-	-	-	-	-	4	-	4	-	-	-	-	35
	CAMEL (R/F)	28	-	-	28	-	-	-	-	-	-	8	8	114	-	46	160	-	-	-	-	196
	TOTAL	$100	$24	$ 6	$130	$ -	$72	$12	$ 84	$ -	$ -	$108	$108	$994	$65	$157	$1,216	$59	$ -	$ -	$59	$1,597
1967	RJR Brands																					
	WINSTON 85	$ 17	$12	$ -	$ 29	$ -	$24	$ 4	$ 28	$ -	$ -	$ 55	$ 55	$ -	$19	$ 37	$ 56	$ -	$ -	$ -	$ -	$ 168
	WINSTON SKS	-	-	-	-	-	12	4	16	-	-	6	6	(I) 1	26	26	53	-	-	-	-	75
	WINSTON MENTHOL	17	-	-	17	-	4	1	5	-	-	-	-	(II) 297	21	10	318	-	-	-	-	340
	SALEM (85/SKS)	48	8	8	64	-	6	7	13	-	-	25	25	310	-	33	343	68	-	-	68	513
	TEMPO	-	2	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2
	CAMEL (R/F)	27	-	-	27	-	-	-	-	-	-	5	5	-	-	13	13	-	-	-	-	45
	TOTAL	$109	$22	$ 8	$139	$ -	$46	$16	$ 62	$ -	$ -	$ 91	$91	$598	$66	$131	$783	$68	$ -	$ -	$68	$1,143

(I) Special Negro effort - Chicago
WINSTON SKS $[illegible].00
WINSTON MENTHOL $5,37[illegible].00

(II) WINSTON MENTHOL $281,[illegible].00 (Special Negro)

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EXHIBIT II

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines Negro	Magazines Jewish	Magazines Spanish	Magazines Total	Newspapers Negro	Newspapers Jewish	Newspapers Spanish	Newspapers Total	Television Negro	Television Jewish	Television Spanish	Television Total	Radio Negro	Radio Jewish	Radio Spanish	Radio Total	Outdoor Negro	Outdoor Jewish	Outdoor Spanish	Outdoor Total	GRAND TOTAL
1968	[illegible] Brands																					
	WINSTON 85	$ -	$ 6	$ -	$ 6	$ -	$25	$ 4	$ 29	$ -	$ -	$ 45	$ 45	$150	$35	$ 40	$241	$ -	$ -	$ -	$ -	$ 321
	WINSTON SKS	-	6	-	6	-	25	4	29	-	-	44	44	105	35	46	186	-	-	-	-	265
	WINSTON MENTHOL	51	-	-	51	-	-	-	-	-	-	-	-	155	-	-	155	-	-	-	-	206
	SALEM (85/SKS)	42	10	9	61	-	17	7	24	-	-	16	16	347	-	61	408	-	-	-	-	509
	CAMEL (R/F)	42	-	-	42	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	42
	TOTAL	$135	$22	$ 9	$166	$ -	$67	$15	$82	$ -	$ -	$105	$105	$765	$70	$155	$990	$ -	$ -	$ -	$ -	$1,343
	Lorillard Theatres																					
	Kent	$33	$ -	$ -	$ 33	$ 48	$20#	$ 7*	$ 75	$ -	$ -	$ 21	$ 21	$210	$ -	$ 44	$254	$ -	$ -	$ -	$ -	$ 383
	Newport	-	-	-	-	-	20#	7*	27	-	-	21	21	-	-	44	44	-	-	-	-	92
	True	30	-	-	30	60	20#	7*	87	-	-	21	21	210	-	44	254	-	-	-	-	392
	Century	-	-	-	-	10	-	-	10	-	-	21	21	-	-	43	43	-	-	-	-	74
	Trek	-	-	-	-	-	-	-	-	-	-	20	20	-	-	-	-	-	-	-	-	20
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$63	$ -	$ -	$ 63	$118	$60#	$21*	$199	$ -	$ -	$104	$104	$420	$ -	$175	$595	$ -	$ -	$ -	$ -	$ 961
	British-American																					
	Kool	$53	$ -	$ -	$ 53	$ 20	$10#	$ -	$ 30	$ -	$ -	$ 19	$ 19	$350	$ -	$ 39	$389	$ -	$ -	$ -	$ -	$ 491
	Viceroy	-	-	-	-	4	40#	-	44	-	-	-	-	-	-	38	38	-	-	-	-	82
	Raleigh/Belair	-	-	-	-	-	20#	-	20	-	-	-	-	-	-	-	-	-	-	-	-	20
	TOTAL	$53	$ -	$ -	$ 53	$ 24	$70#	$ -	$ 94	$ -	$ -	$ 19	$ 19	$350	-	$ 77	$427	$ -	$ -	$ -	$ -	$ 593

Includes National Publications.
*Includes Teams.

8/11/69
Revised 9/17

Sources for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) -
[illegible] TV [illegible]
New[illegible] - Media Representatives

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EXHIBIT II (Cont.)

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1968 Cont.	American Tobacco																					
	Tareyton	$34	$ -	$ -	$ 34	$ -	$10#	$ -	$ 10	$ -	$ -	$ 11	$ 11	$ 40	$ -	$ 11	$ 51	$ -	$ -	$ -	$ -	$ 106
	Pall Mall	35	-	-	35	48	10#	-	58	-	-	12	12	40	-	11	51	-	-	-	-	156
	Carlton	-	-	-	-	-	-	1*	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Lucky Strike	15	-	-	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	15
	Silva Thins	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$84	$ -	$ -	$ 84	$ 48	$20#	$ 1*	$ 69	$ -	$ -	$ 23	$ 23	$ 80	$ -	$ 22	$102	$ -	$ -	$ -	$ -	$ 278
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 25	$ -	$204	$229	$ -	$ -	$ -	$ -	$ 229
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 25
	Marlboro	45	-	-	45	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	45
	Benson & Hedges	-	-	-	-	8	-	-	8	-	-	-	-	-	-	-	-	-	-	-	-	8
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$45	$ -	$ -	$ 45	$ 8	$ -	$ -	$ 8	$ -	$ -	$ -	$ -	$ -	$ 5	$ 20	$ 25	$ -	$ -	$ -	$ -	$ 78

Sources for competitive information
Jewish - Joseph Jacobs Organization
Negro Magazine (Ebony) - PIB
[illegible]
[illegible] - [illegible]

#Includes National Publications.
*Includes Texas.

8/11/69
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EXHIBIT III

R. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969	R/R Brands																					
	WINSTON 85	$60	$ 7	$ -	$67	$ -	$27	$ 7	$ 34	$ -	$ -	$75	$ 75	$177	$35	$ 86	$298	$ -	$ -	$ -	$ -	$ 474
	WINSTON SKS	33	7	-	40	-	27	1	28	-	-	30	30	-	35	7	42	-	-	-	-	140
	WINSTON MENTHOL	12	-	-	12	-	-	-	-	-	-	-	-	83	-	-	83	-	-	-	-	95
	SALEM (85/SKS)	106	6	9	121	-	14	7	21	-	-	19	19	151	-	55	206	-	-	-	-	367
	DORAL	-	15	-	15	-	21	-	21	-	-	-	-	-	12	-	12	-	-	-	-	48
	CAPRI (R/F)	18	-	-	18	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18
	TOTAL	$229	$35	$ 9	$273	$ -	$89	$15	$104	$ -	$ -	$124	$124	$411	$82	$148	$641	$ -	$ -	$ -	$ -	$1,142
	Loews' Theatres																					
	Kent	$47	$ -	$ -	$ 47	$ 2	$43	$ 2	$ 47	$ -	$ -	$ 77	$ 77	$187	$ -	$ 84	$271	$147	$ -	$ 3	$150	$ 592
	Newport	65	-	-	65	176	43	2	221	-	-	77	77	269	-	81	350	148	-	3	151	864
	True	-	-	-	-	-	-	9	9	-	-	77	77	87	-	84	171	-	-	-	-	257
	Century	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Erik	-	-	-	-	-	-	-	-	-	-	-	-	-	-	22	22	-	-	-	-	22
	Old Gold	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$112	$ -	-	$112	$178	$86	$13	$277	$ -	$ -	$231	$231	$543	$ -	$271	$814	$295	$ -	$ 6	$301	$1,735
	British-American																					
	Kool	$ 87	$ -	$ -	$ 87	$ 31	$ -	$ -	$ 31	$ -	$ -	$ 46	$ 46	$599	$ -	$ 42	$ 641	$ -	$ -	$ -	$ -	$ 805
	Viceroy	68	-	-	68	5	27	-	32	-	-	46	46	349	-	44	393	-	-	-	-	539
	Raleigh/Belair	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL	$155	$ -	$ -	$155	$ 36	$27	$ -	$ 63	$ -	$ -	$ 92	$ 92	$948	$ -	$ 86	$1,034	$ -	$ -	$ -	$ -	$1,344

[illegible]
Jewish - [illegible]
Negro Magazine (Ebony) - [illegible]
[illegible]
Spanish - [illegible]

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Revised [illegible]/17

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EXHIBIT III (Cont.)

P. J. REYNOLDS TOBACCO COMPANY

1965-1969 ESTIMATED MAJOR COMPETITIVE ETHNIC ADVERTISING EXPENDITURE HISTORY

BY YEAR/BY BRAND/BY MEDIA
(000)

Year	Company & Brands	Magazines				Newspapers				Television				Radio				Outdoor				GRAND TOTAL
		Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	Negro	Jewish	Spanish	Total	
1969 Cont.	American Tobacco																					
	Tareyton	$ 42	$ -	$ -	$ 42	$ -	$ 10	$ -	$ 10	$ -	$ -	$ 18	$ 18	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 166
	Pall Mall	48	-	-	48	81	10	-	91	-	-	18	18	-	-	-	-	-	-	-	-	157
	Carlton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lucky Strike	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Silva Thins	42	-	-	42	-	-	-	-	-	-	18	18	-	-	-	-	-	-	-	-	60
	TOTAL	$132	$ -	$ -	$132	$ 81	$ 20	$ -	$101	$ -	$ -	$ 54	$ 54	$ 96	$ -	$ -	$ 96	$ -	$ -	$ -	$ -	$ 383
	Liggett & Myers																					
	L&M	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 11	$ -	$ 23	$ 34	$ -	$ -	$ -	$ -	$ 37
	Lark	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Chesterfield	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	-	-	-	-	1
	TOTAL	$ -	$ -	$ -	$ -	$ 3	$ -	$ -	$ 3	$ -	$ -	$ -	$ -	$ 12	$ -	$ 23	$ 35	$ -	$ -	$ -	$ -	$ 38
	Philip Morris																					
	Alpine	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Marlboro	-	-	-	-	1	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	1
	Benson & Hedges	90	-	-	90	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	90
	Parliament	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Lido	-	-	-	-	-	-	-	-	-	-	-	-	9	-	-	9	-	-	-	-	9
	TOTAL	$ 90	$ -	$ -	$ 90	$ 1	$ -	$ -	$ 1	$ -	$ -	$ -	$ -	$ 9	$ -	$ -	$ 9	$ -	$ -	$ -	$ -	$ 100

Sources: [illegible] competitive information
Jewish - Joseph Jacobs Organization
Negro Magazines (Ebony) - [illegible]
[illegible] - [illegible]
[illegible] paper - [illegible]

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