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TO: Distribution  
FROM: Pascal Fernandez / Natalie Ellis  
SUBJECT: MAT Performance Update -- Smoker Tracking Study

DATE: June 11, 1993

Attached are top line results on a 4 weeks rolling basis from the Continuous Tracking Study up to June 6, '93. Included are Marlboro smoker and past 7 day volume, as well as, Marlboro Adventure Team awareness and participation among total and 18 to 24 smokers.

Please keep in mind that June 6, '93 data is based on 4 weeks rolling information and do not reflect the launch of Marlboro Leadership Program.

**Main Findings**

**Marlboro Smoker and Past 7 Day Volume performance.**

- Among total smokers, Marlboro smoker share trend holds at its previous level (Chart 1). Marlboro volumetric share shows a downward trend after a period of stabilization.

**Marlboro Smoker and Volume Shares among total Smokers:**

<u>Monthly:</u>	<u>Final Data</u>				<u>4 Weeks Moving</u>	
	<u>Jan93</u>	<u>Feb93</u>	<u>Mar93</u>	<u>Apr93</u>	<u>May30*</u>	<u>June6*</u>
	%	%	%	%	%	%
Smoker	27.8	28.1	28.3	28.3	27.5	26.8
Volumetric	24.7	25.0	25.4	25.3	23.7	23.2

\* Top Line / Uncleaned Data

(Source: Continuous Tracking Study)

(Charts 1-2)

- Marlboro alternate volumes outflow trend from Marlboro smokers shows a decline from January to present. This suggests a higher level of past 7 day loyalty among Marlboro smokers. Marlboro alternate inflow to Marlboro volumes continue to hold at their previous level.

(Chart 3)

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... spite a stabilization of Marlboro smoker share trend, Marlboro volumetric share from Marlboro smokers is trending down.

Chart 4)

... s important to note that Marlboro out-switchers are heavier smokers than current Marlboro smokers and Marlboro in-switchers.

verage Consumption (12 months moving April 93)

	Marl. smoker	Marl. Out-Switcher	Marl. In-Switchers
Packs/ Week	8.5 packs	10.0 packs	14.4 packs
Consumption/Day	24.3 cig.	5.7 cig.	8.3 cig.

... Along 18-24 smokers, Marlboro smoker and volumetric shares continue to experience a decline.

Charts 5-7)

### Marlboro Adventure Team Awareness and Participation.

The effect of the new catalog and outdoor advertising appear to be peaking as the rate of increase in overall awareness has slowed and is now at 50% on a four week rolling average basis among total smokers. The rise is being driven by continuing awareness gains among competitive smokers (currently 39%) Awareness among Marlboro smokers has remained at 80%.

Participation in the program remains stable and is now at 48% among Marlboro smokers while participation among non-Marlboro smokers is 4.2%. The percentage of total smokers collecting Marlboro Miles remains at 16%. If the Leadership program is going to have an effect on collecting rates, we should begin to see it next week.

Awareness continues to grow among 18-24 year olds and their participation rate also recovered slightly. The current levels among 18-24 year olds are 76 % and 32%.

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