

CONFIDENTIAL

MSIntelligence™
Diagnostic Market Surveys

Norway 2009 Q4 Industry Market Survey

Empty Discarded Pack Collection

Contents

- **Survey Objectives and Methodology Overview**
- **Results**

1. Survey Objectives and Methodology

Objectives

CONFIDENTIAL

MSIntelligence™
Diagnostic Market Surveys

- **Provide an indication on the incidence of non-domestic or counterfeit cigarettes**

1. Survey Objectives and Methodology Overview

- **Empty Discarded Pack (EDP) collection**
 - Random collection from streets and public bins
 - Any brand and market variant
 - 8 principal cities
 - Cities sample quotas proportional to population
 - Actual collection: 4998 packs
 - This market survey was jointly conducted by BAT and PMI
 - Fieldwork conducted between October 13th and November 4th, 2009
- **Limitations**
 - Homes and workplaces are not covered
 - Other competitors' pack analysis: identification of domestic and non-domestic variants only

1. Survey Objectives and Methodology

Regional Split

CONFIDENTIAL

MSIntelligence™
Diagnostic Market Surveys

City	Sample (packs)	Sample (%)
OSLO	1,988	39.78
BERGEN	870	17.41
TRONDHEIM	582	11.64
STAVANGER	420	8.40
BAERUM	379	7.58
KRISTIANSAND	277	5.54
FREDRIKSTAD	252	5.04
TROMSO	230	4.60
	4,998	100

Population of selected cities represents 30.3% of total Norway population



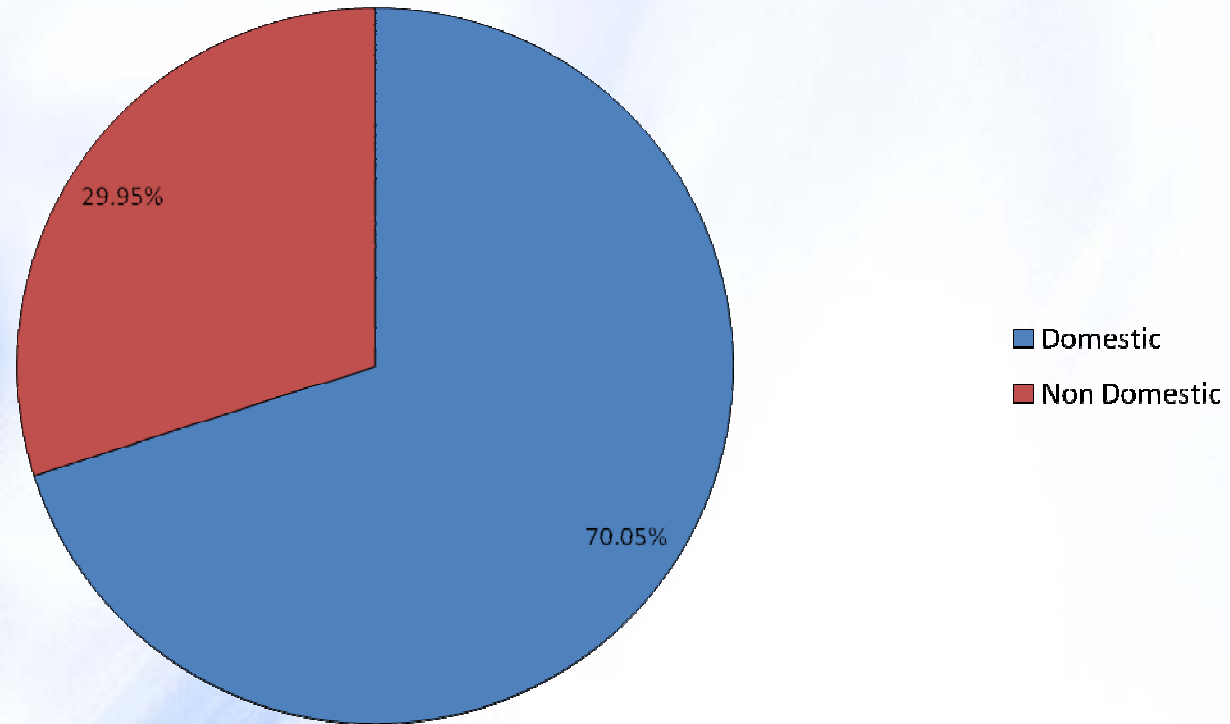
Contents

- **Survey Objectives and Methodology Overview**
- **Results**

2. Results – All Packs Collected Non Domestic Incidence

CONFIDENTIAL

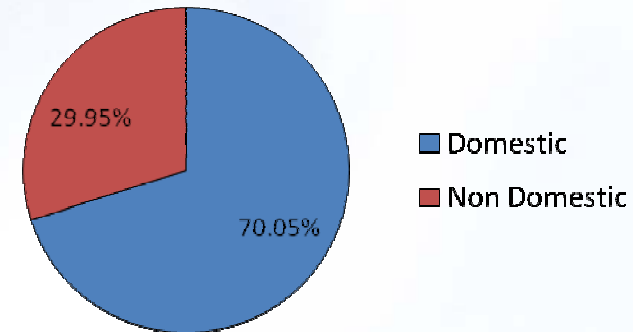
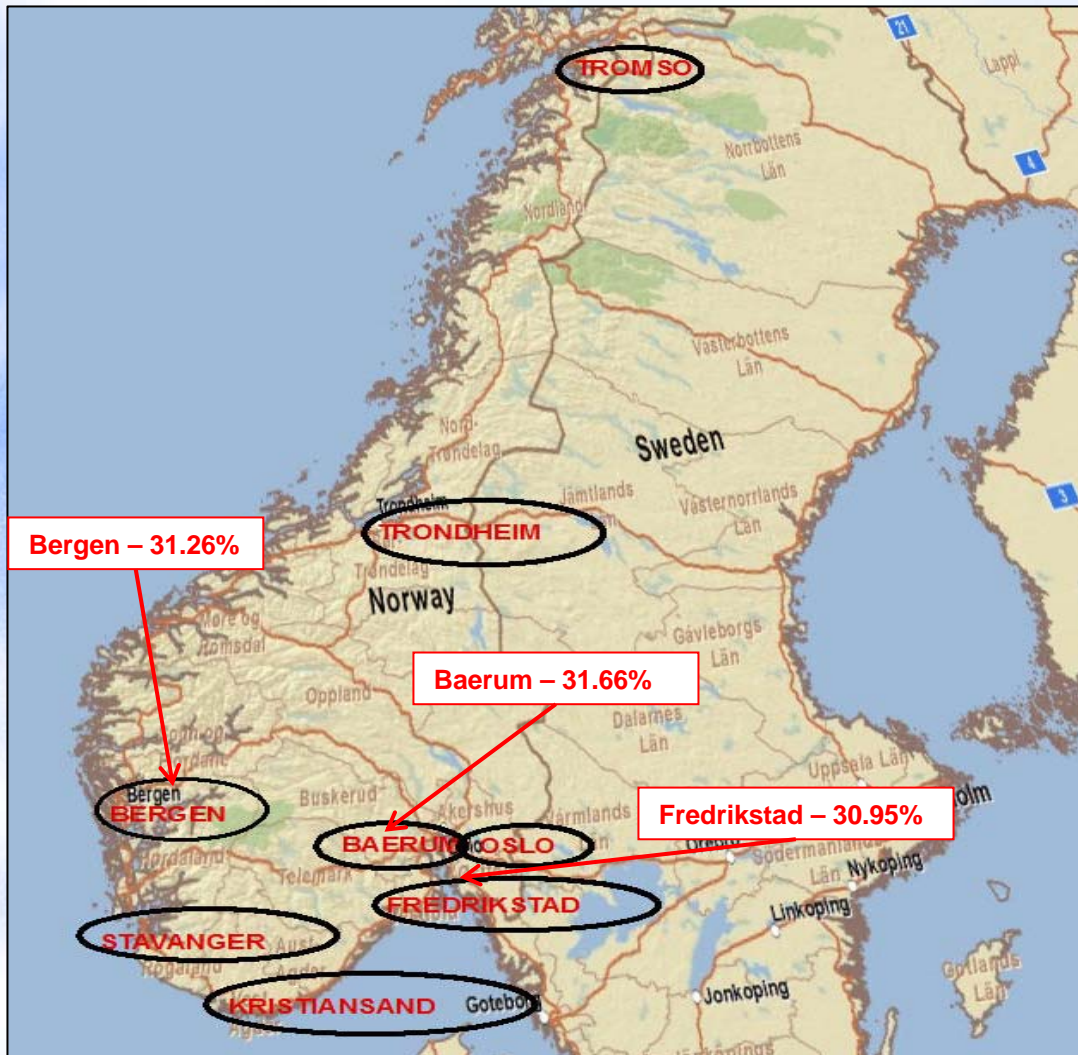
MSIntelligence™
Diagnostic Market Surveys



N= 4998 Packs.

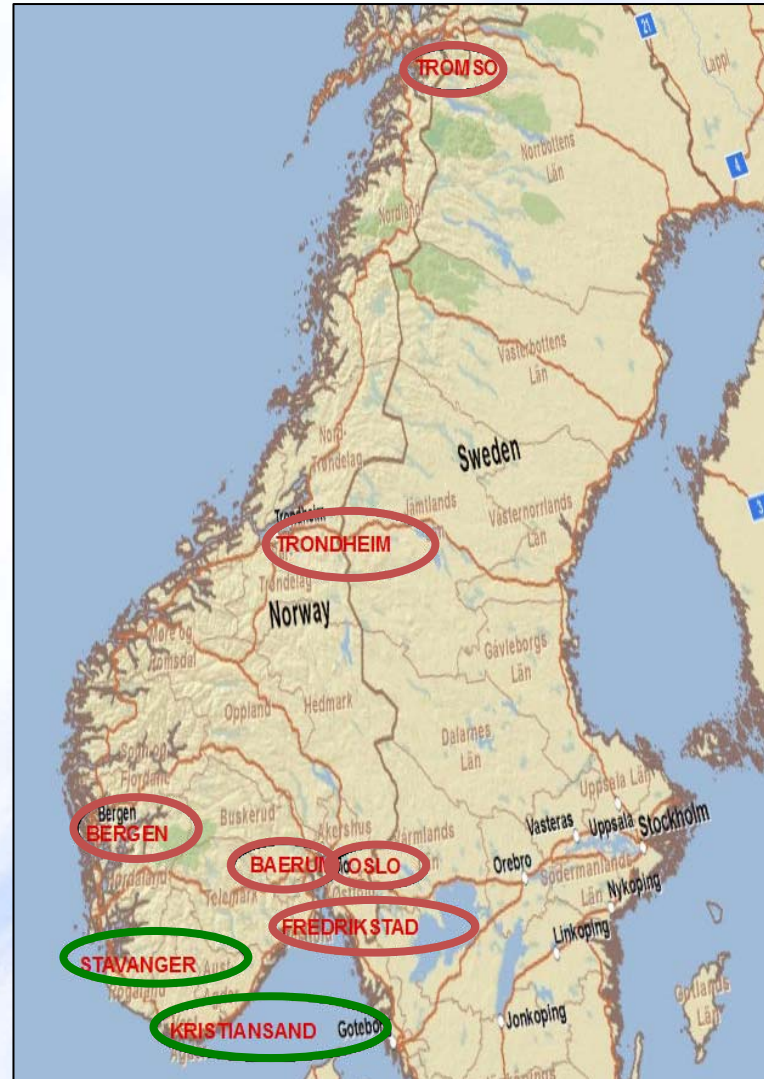
2. Results – All Packs Collected Non Domestic Incidence by City

The highest non domestic incidence was found in the cities of Baerum (31.66%), Bergen (31.26%) and Fredrikstad (30.95%).



2. Results – All Packs Collected Counterfeit Presence

Counterfeit packs were found in 6 out of 8 cities



-  counterfeit packs found in a city
-  counterfeit packs not found

CONFIDENTIAL

MSIntelligence™
Diagnostic Market Surveys

Norway 2009 Q4 Industry Market Survey

Empty Discarded Pack Collection

Extract from MSIntelligence presentation