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Diagnostic Market Surveys

# Norway 2009 Q4 Industry Market Survey

## Empty Discarded Pack Collection

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

# 1. Survey Objectives and Methodology

## Objectives

- **Provide an indication on the incidence of non-domestic or counterfeit cigarettes**
- **Gain information related to non-domestic or counterfeit cigarettes by**
  - Manufacturers
  - Regions
  - Brand families

# 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
- **Caution**
  - Findings cannot be used to extrapolate volumes
  - The survey is designed to focus on trends rather than incidence at a single point in time

# 1. Survey Objectives and Methodology

## Regional Split

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
	<b>4,998</b>	<b>100</b>

Population of selected cities represents 30.3% of total Norway population



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## 2. Executive Summary

### Key Findings

#### Industry

- High level of non domestic incidence (29.95%)
- The highest non domestic incidence was found in the cities of Baerum (31.66%), Bergen (31.26%) and Fredrikstad (30.95%)
- Out of all non domestic packs collected, 2.07% were counterfeit

#### BAT

- Non Domestic incidence 24.74%
- Genuine Non Domestic incidence 24.19%
- Counterfeit incidence 0.55%

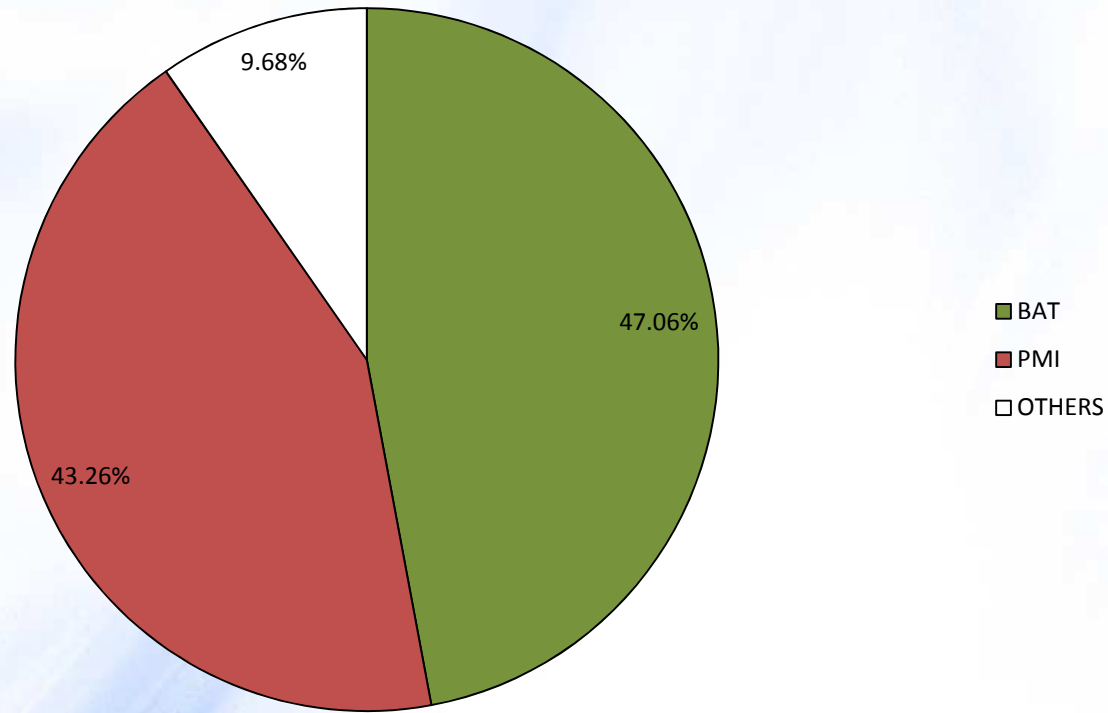
#### PMI

- Non Domestic incidence 34.00%
- Genuine Non Domestic incidence 33.16%
- Counterfeit incidence 0.83%

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### 3. Results – All Packs Collected Share of Sample by Company



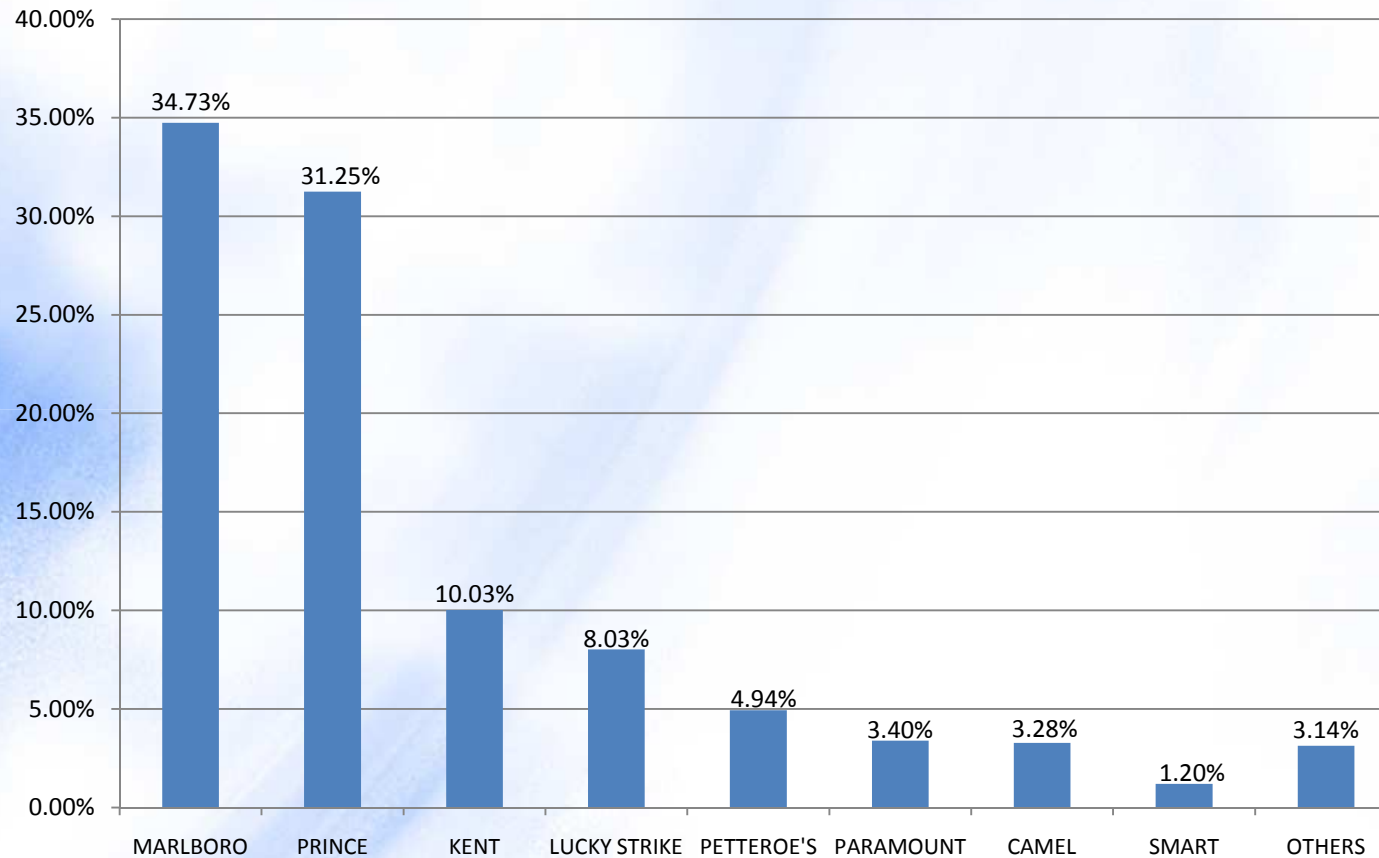
N = 4998 packs.

### 3. Results – Domestic Packs

## Share of Market by Brand family

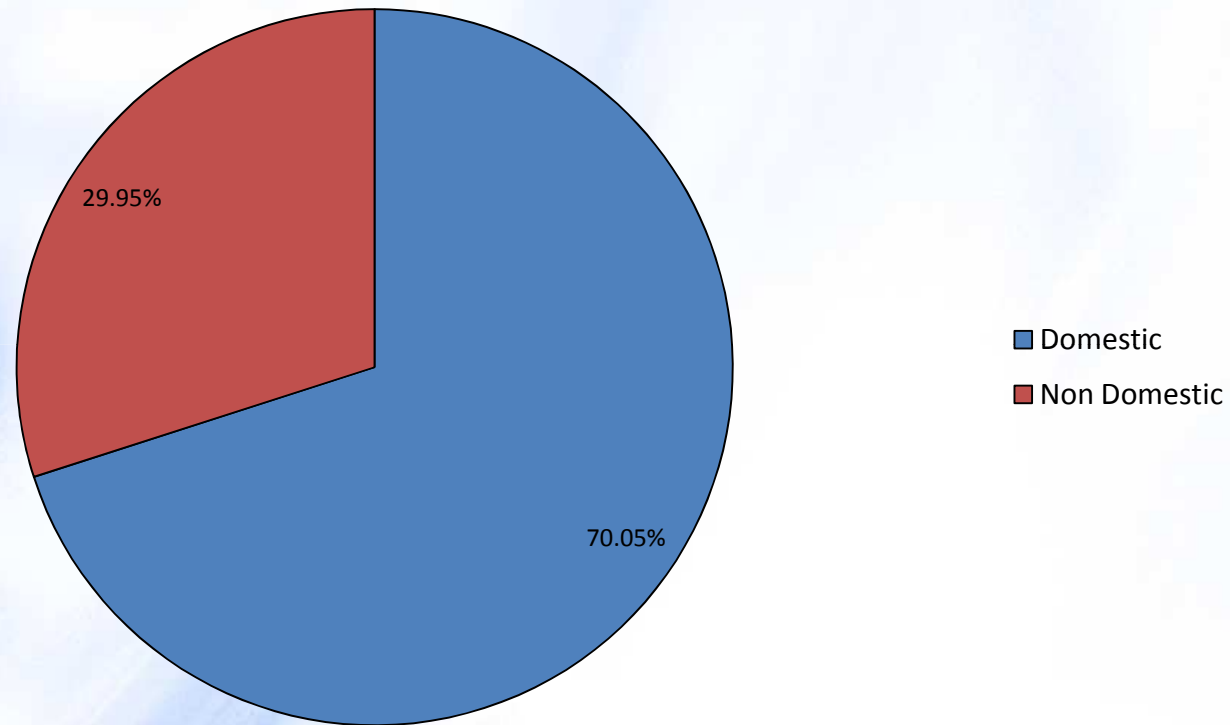
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N = 3501 domestic packs.

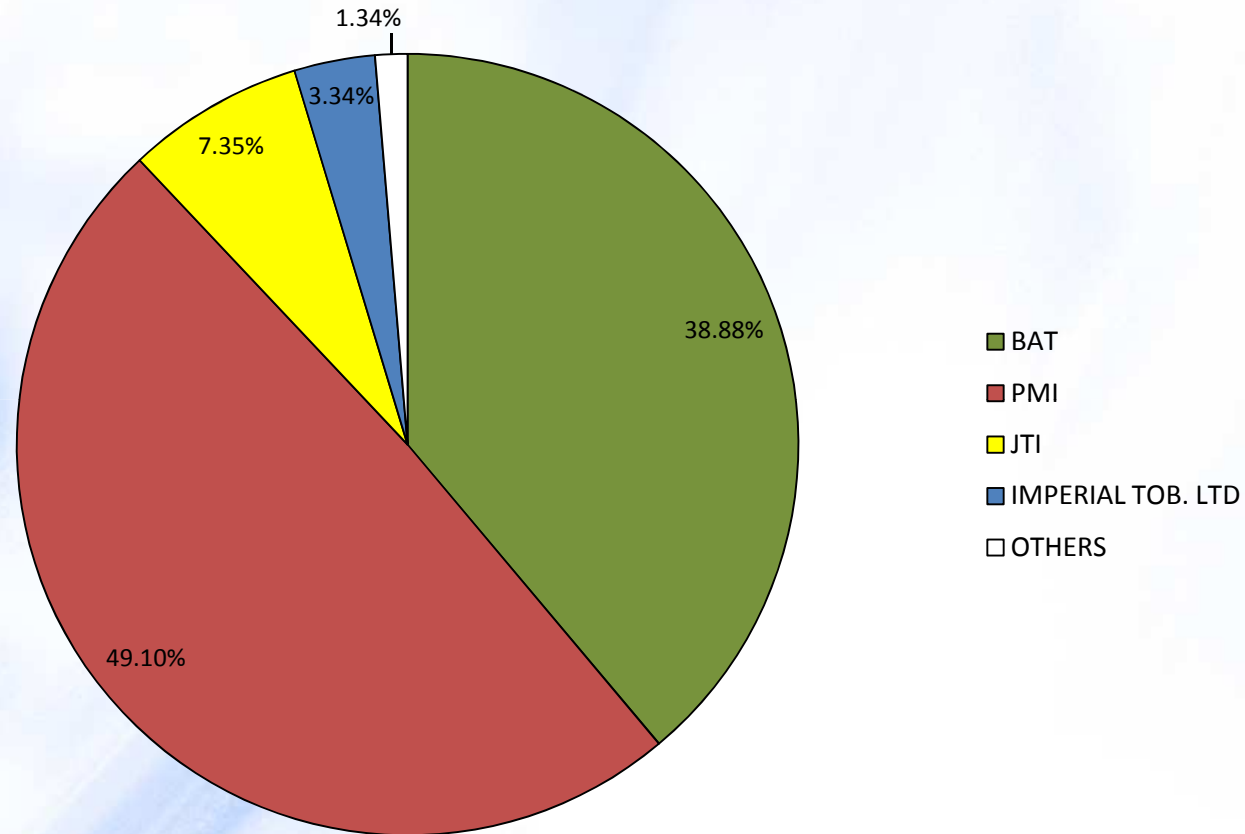
### 3. Results – All Packs Collected Non Domestic Incidence



N= 4998 Packs.

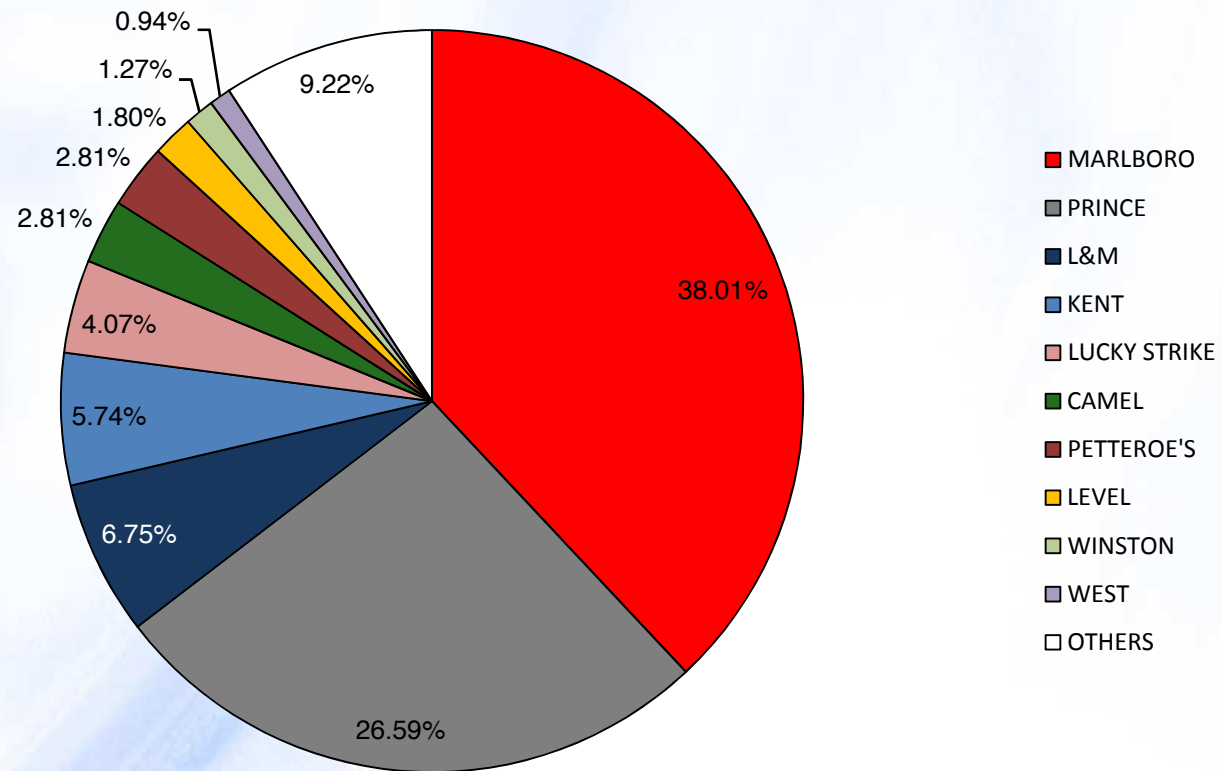
### 3. Results – Non Domestic

## Non Domestic packs - breakdown by Company



N= 1497 Non Domestic Packs.

### 3. Results – Non Domestic Non Domestic packs - breakdown by Brand



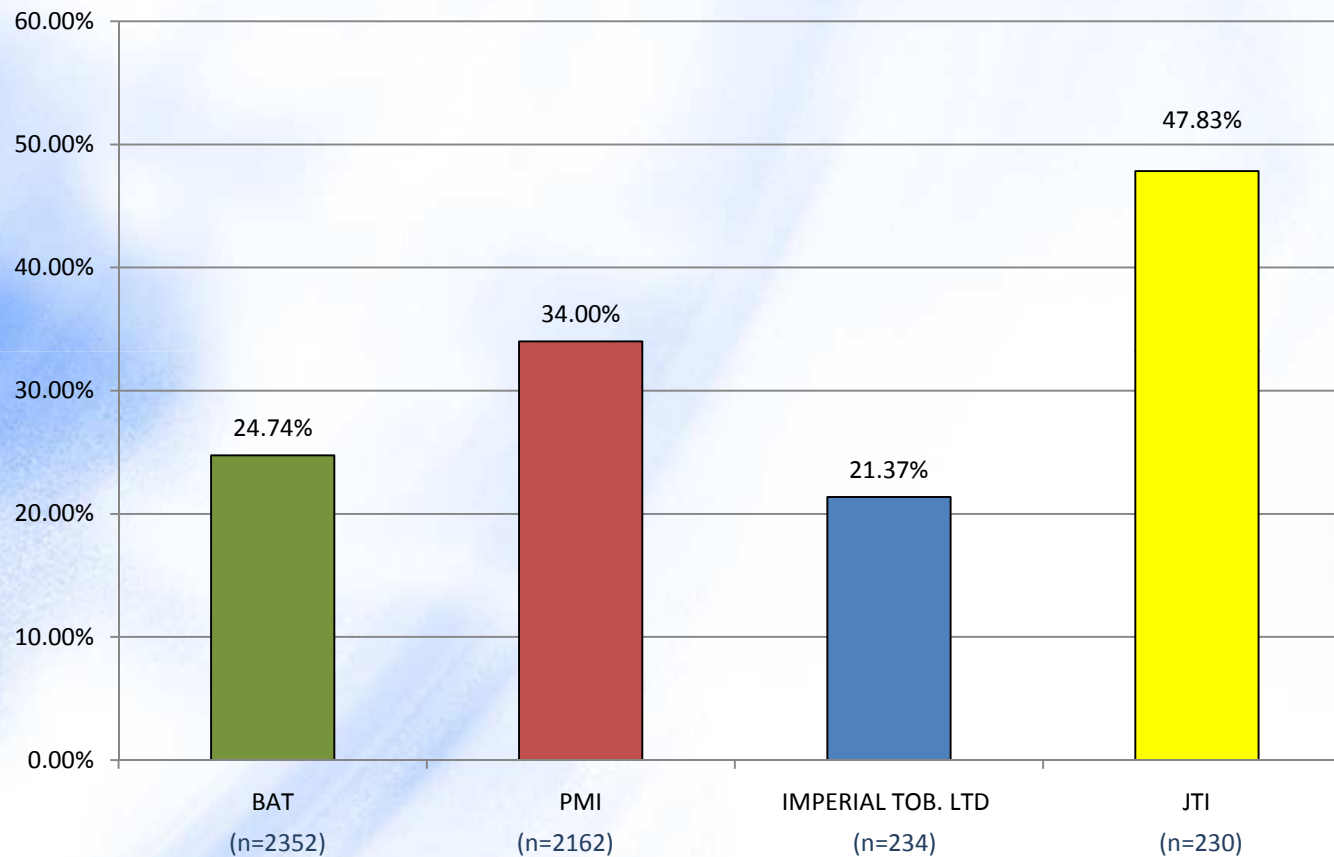
N= 1497 Non Domestic Packs.

### 3. Results – Non Domestic

## Non Domestic incidence by company

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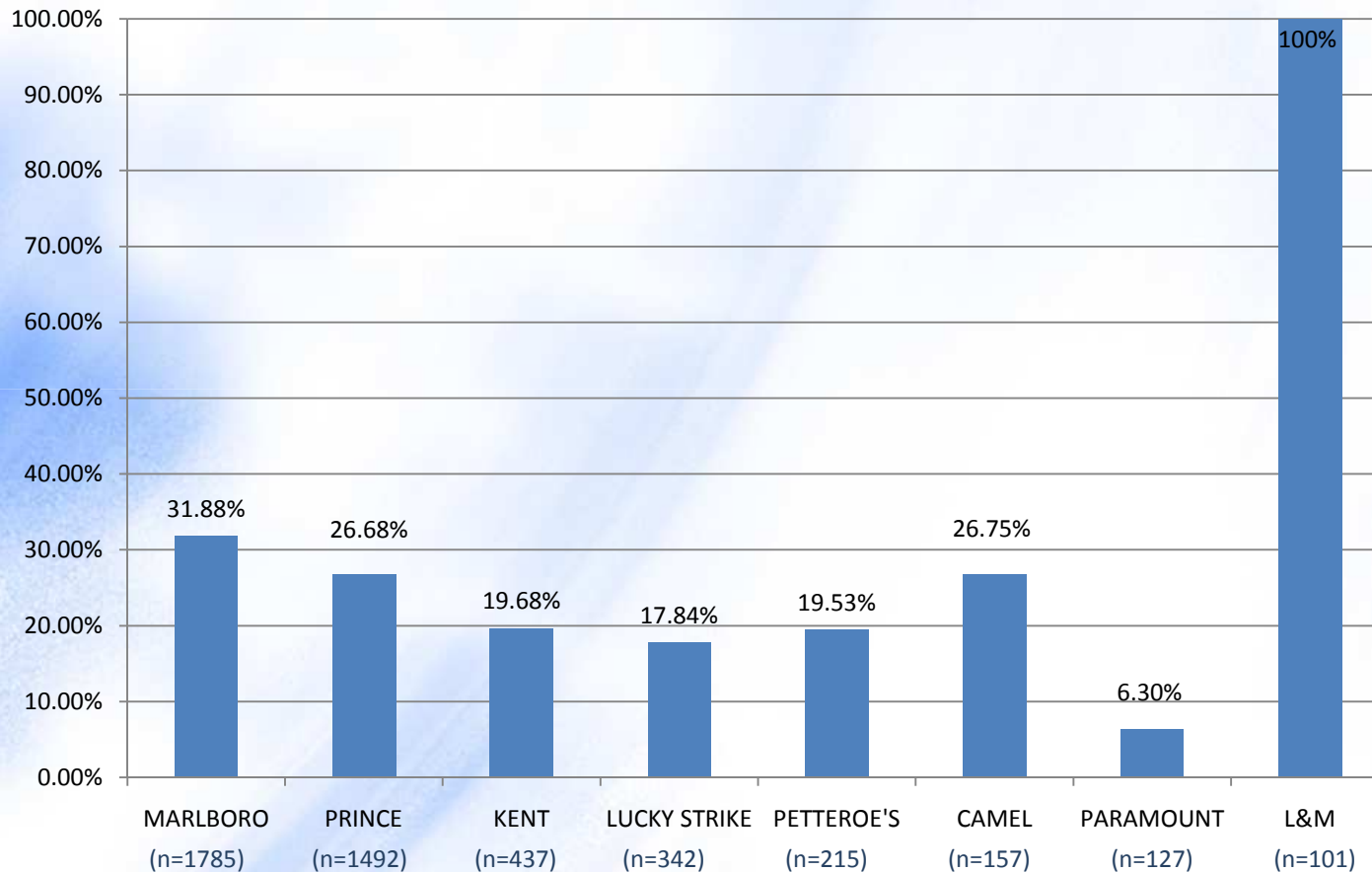
\*Other companies have fewer packs than required for reliable statistics

### 3. Results – Non Domestic

## Non Domestic incidence by brand

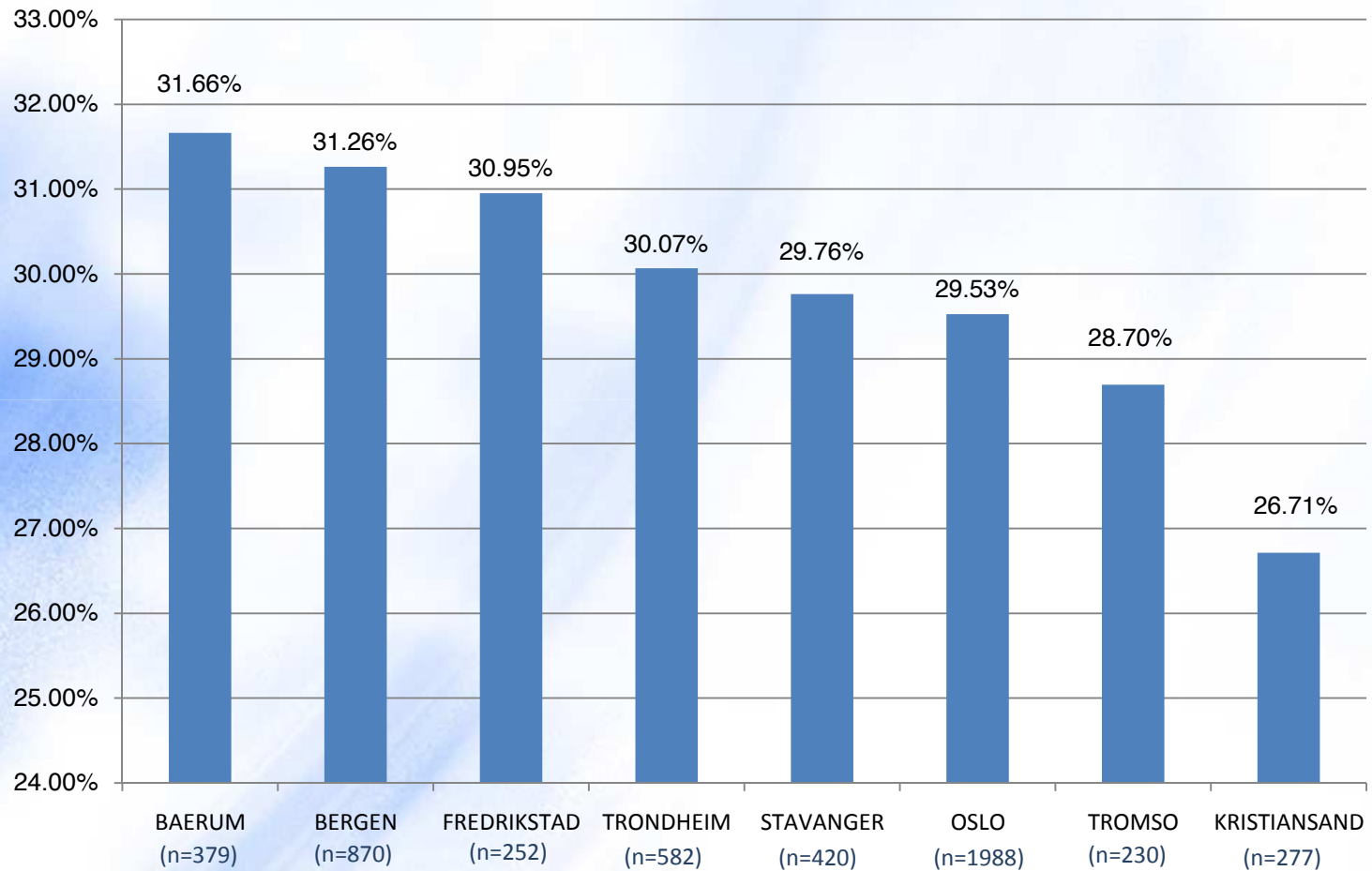
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\*brands with a basis <50 packs are not shown

### 3. Results – All Packs Collected Non Domestic Incidence by City

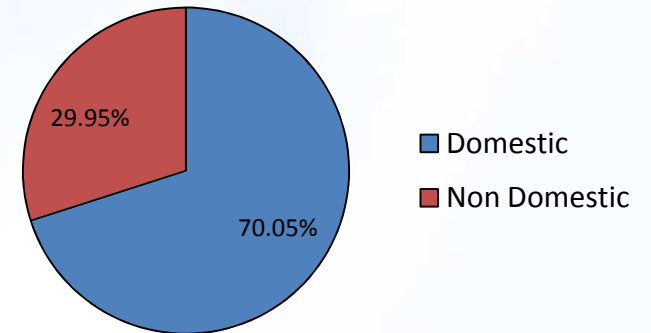
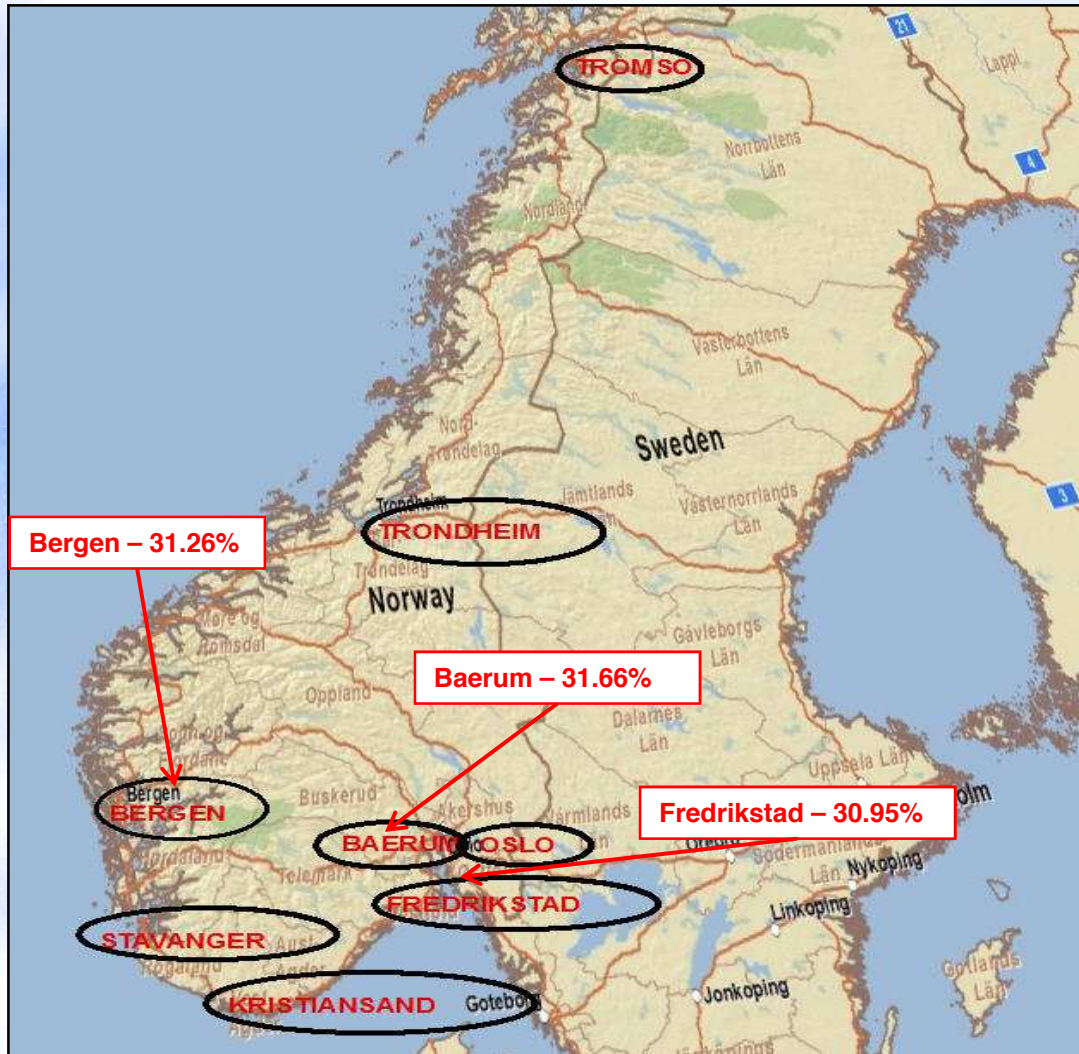


N= 1497 Non Domestic Packs.



### 3. Results – All Packs Collected Non Domestic Incidence by City

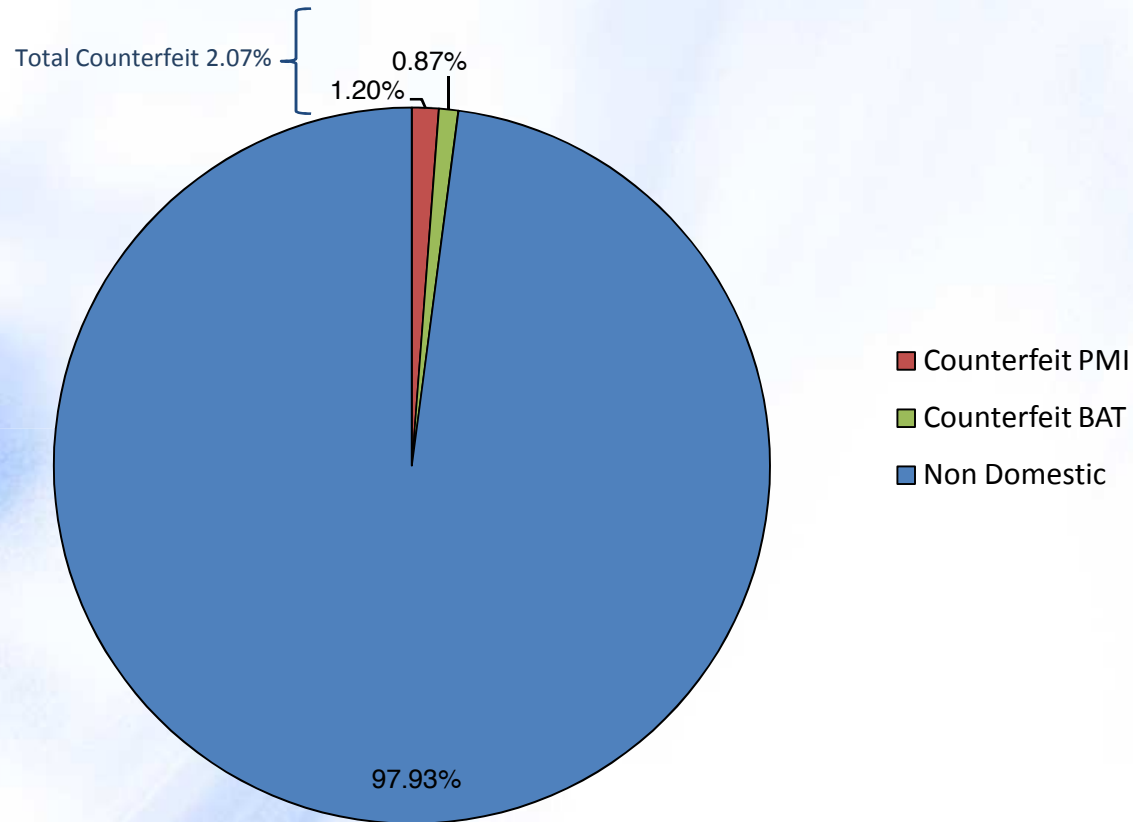
The highest non domestic incidence was found in the cities of Baerum (31.66%), Bergen (31.26%) and Fredrikstad (30.95%).



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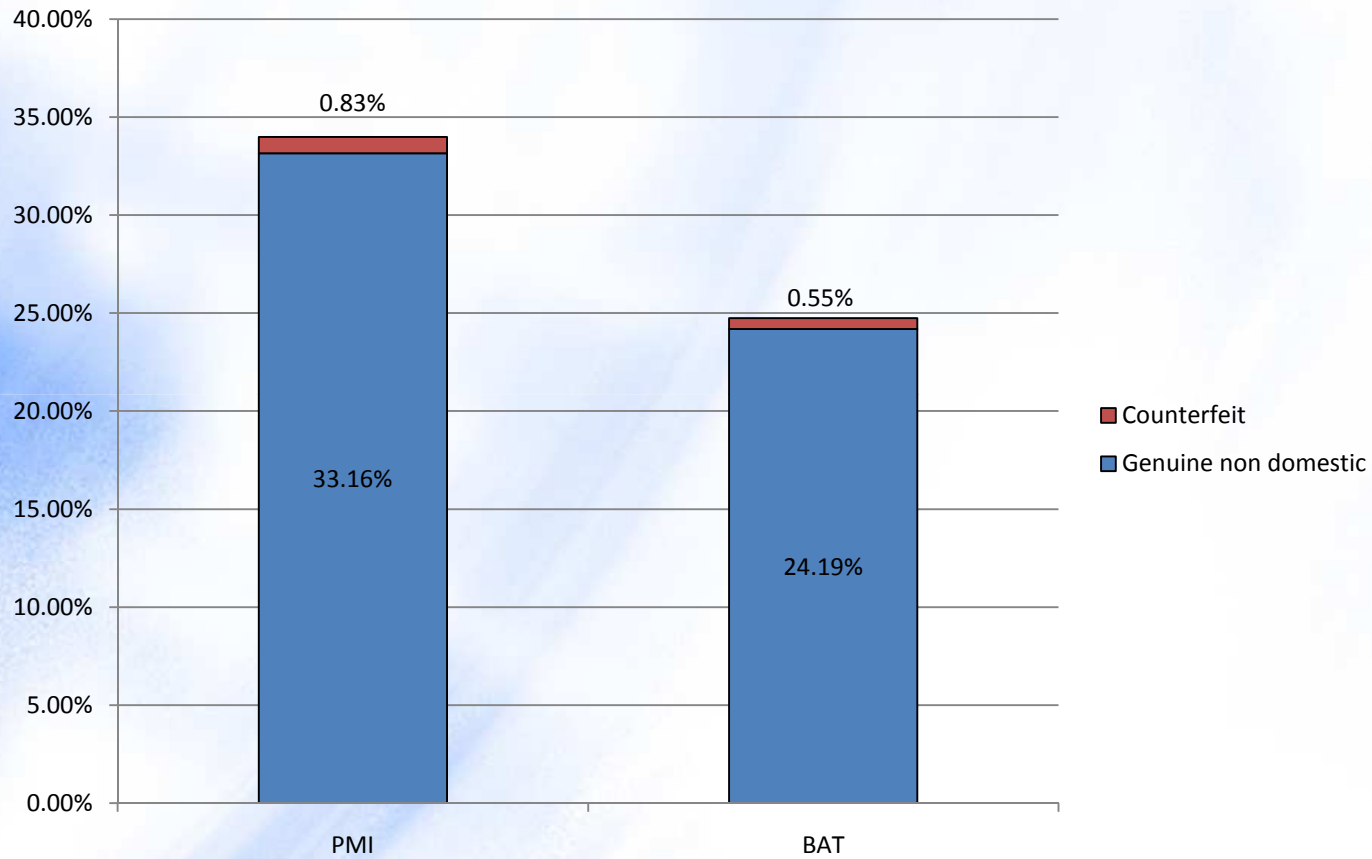
### 3. Results – All Packs Collected

## Counterfeit share of Non Domestic Packs



N= 1497 Non Domestic Packs.

### 3. Results – All Packs Collected Counterfeit and Genuine Non Domestic Incidence for BAT and PMI



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