

52950 0160

INCREMENTAL PROMOTED VOLUME PERFORMANCE - SEPTEMBER 2003									
	Retention		SOR Lift		Competitive		Total		
	Plan	Actual	Plan	Actual	Plan	Actual	Plan		Actual
Winston	1,471		23,078		57,736		82,285		0
Camel	1,420		25,514	38	58,708		85,642		38
Salem	178		5,610		6,358		12,146		0
Doral	4,709	9	48,311		18,747	20	71,768		29
Total	7,779	9	102,513	38	141,549	20	251,841		67
INCREMENTAL PROMOTED VOLUME ALLOCATION - SEPTEMBER 2003									
	Retention		SOR Lift		Competitive		Total		
	Plan	Actual	Plan	Actual	Plan	Actual	Plan		Actual
Winston	1%	0%	9%	0%	23%	0%	33%		0%
Camel	1%	0%	10%	56%	23%	0%	34%		56%
Salem	0%	0%	2%	0%	3%	0%	5%		0%
Doral	2%	14%	19%	0%	7%	30%	28%		44%
Total	3%	14%	41%	56%	56%	30%	100%		100%

Share Impact Based On Actual Redemption
And Assumed Levels Of IPV

	<u>Ass IPV</u> (millions)	<u>SOME</u>
CAROL	38.8	.1
WINSTON	56.0	.2
SALEM	17.9	.1
DORAL	<u>57.3</u>	<u>.2</u>
	170.0	.5

COMP

PACK CTN

DESC

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Martin Group III

State / B.B. Grouped based upon Hi / Lo

Face Values. (Static Stand) Sept '03

Comprising

	SOMD	% PCGPD	% Vol BGGFD	% Vol Display
Hi	+1.18	-2.36	+1.02	+1.44
Lo	+2.25	-2.79	+6.30	+3.35
Total	+2.21	-1.32	+2.99	+2.13

DNOR Retail? SALEM

	SOMD	% Price GPD	% Vol BGGFD	% Vol Display
Hi	-	+1.36	-6.3	-1.19
Lo	+0.3	+0.7	-2.8	-1.9
Total	+0.2	+0.3	-4.3	-2.2

Base Win/Start

	SOMD	% PCGPD	% Vol BGGFD	% Vol Display
Hi	-1.1	+2.05	-2.74	+1.84
Lo	-0.7	+1.80	-2.27	-3.2
Total	-0.9	+1.31	-2.47	+1.8

Deal

	SOMD	% Price GPD	% Vol BGGFD	% Vol Display
Hi	-0.9	+1.47	-1.6	-1.94
Lo	-0.2	-1.1	+0.4	-1.97
Total	-0.5	+1.3	-0.6	-1.95

Key Points

- While the A#itundal data suggests higher Redemption in "H" states, like the SOR as
- Little evidence exists for increased purchases @ retail
- Causal data would explain the shifts in SOM period to period in total and across groups.
- In future months we would like to create an expectation column.
- Even versus previous 7month trend little variance could be attributed to Non-retail events.

Market Group II

Penetration of H & H mailed vs Brand BDI (H & H vs L - Static Market) Sept 03

Control x-ray SOMD

	<u>% Penetration</u>		
BDI	H	L	Total
H	+26	+18	+21
L	+14	+32	+21
Total	+18	+24	+21

B. Winston

	<u>% Penetration</u>		
BDI	H	L	Total
H	-04	-10	-05 *
L	-21	-11	-13
Total	-08 *	-11	-09

* Suggests H: Franchise & Higher Penetration are important in the 1st wave of Mailings.

The -04 in the H/H Group is what you'd expect
Better Performance in H: BDI & H: Penetration Markets

Key Points

Penetration of H & H does appear to have some Positive Influence on Refill Share.
This, similar to the consumer research is found on Deal most notably & secondary on Winston

Salon

	<u>% Penetration</u>		
BDI	H	L	Total
H	-	+07	+02
L	-	+04	+03
Total	-	+05	+02

Total

	<u>% Penetration</u>		
BDI	H	L	Total
H	-05	-12	-09
L	+03	-03	-01
Total	-03 *	-08	-05

* Suggests higher Penetration does present an impact to retail volume impact in the Short-term
- These Markets did hold price also

Median Group I % of Snacks Mailed on AML w/ High Median Low Groups. (Static 7 months) Sp 03

<u>Cambridge</u>				
	<u>SOMD</u>	<u>% PGPD</u>	<u>% Vol BGF</u>	<u>% Vol DFD</u>
Hi	+17	-50	+2.15	+2.08
Med	+25	-1.69	+3.44	+2.51
Lo	+19	-2.20	+3.81	+1.59
Total	+21	-1.32	+2.99	+2.13

<u>DORAL</u>				
	<u>SOMD</u>	<u>% PGPD</u>	<u>% Vol BGF</u>	<u>% Vol DFD</u>
Hi	-0.7	-33	+0.04	-1.71
Med	+0.3	+28	-0.20	-0.28
Lo	-0.16	+1.90	-0.19	+0.93
Total	-0.05	+0.13	-0.06	-0.95

Key Points

- Based upon the Volume of Mail sent to consumers little evidence exists to suggest, other than retail factors, incremental share was attained.
- Perhaps to top two groups in Winston & the middle group for Dorco.
- In future months averse expectation column will be added.
- Even versus previous 7 month trend little variance can be attributed to non-retail factors.

- ① Wawa +0.03 for
- ② +0.29
- ③ -0.07
- ④ -0.05
- ⑤ +0.2 vs 0.3 -0.05-16