



BRITISH-AMERICAN TOBACCO COMPANY LIMITED

12 May 1993

FACSIMILE

Mr T E Whitehair
Brown & Williamson Tobacco Corporation
P.O. Box 35090
Louisville
Kentucky 40232
U.S.A

Dear Tom,

TSG
LUCKY STRIKE
"Nothing Else" Campaign Evaluation

Thank you for sending BATCo a copy of BWI's Biker/Sonst Nichts analysis. Jimmi had not received one before so I had not seen it either. The charts you sent are for total market and all smokers. We express the "Nothing Else" markets' performance also amongst the YAUS target which is MARLBORO's core franchise.

We want to eradicate any thought that BATCo's European companies doubled spend once "Nothing Else" was introduced. The support numbers in the document verify this. By far the largest increase (+44%) was in Belgium/Luxembourg where sadly the restrictions prevented the full "Nothing Else" campaign executions being used and where gaining awareness is difficult and costly.

One detail - I enclose a copy of BAT Holland's spontaneous advertising awareness data from 1991 and 1992. This does not tally with your chart at all. Please could you tell me your data source?

USIBG's TSG Briefing to Barry Bramley

I was asked for a briefing document and I enclose a copy of it for you. I gather BATCo will not be circulating this as a TSG paper. BATCo thinks there is good news and some less encouraging news in the "Nothing Else" markets. In comparison with MARLBORO's initial share progression in Europe, these are early days.

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The mix is not optimal. Price parity with MARLBORO has been achieved but outside Switzerland the product needs further improvement. The target BATCo has set is the YAUS but also Opinion Leaders and Trend Setters in that segment. We recognise Ulrich's concern about becoming only a niche or fringe brand. We have some hopeful signs but significant share growth will take time.

Argentine Launch : Lessons Learned

I attach a copy of Nobleza's report. MARLBORO's SOM growth to 27% from under 12% in two years shows no sign of slowing. We can arrange for BWI to be sent a copy of the video cassette if you would like one.

Best wishes,



JG HACKING

cc: Mr T E Sandefur
Mr J Rembiszewski
Mr I D Macdonald

Attach.

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