

Press Release

Wednesday 31 December 2003

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Super Bowl scores touch down as world's most popular TV sporting event in 2003

Initiative's most recent ViewerTrack™ global TV ratings report spotlights the popularity of 2003's top sports broadcasts

London, December 31, 2003 -- Initiative's recently published ViewerTrack™ report from global media research arm, Futures, shows the Super Bowl was the biggest sporting event of 2003 in terms of thousands of viewers.

Even though its global footprint barely extended outside North America, it easily attracted more viewers than any of the more 'international' sporting events.

In a year where the biggest 'international' sporting events didn't take place – namely the Summer Olympic Games, Football World Cup or European Football Championships, the global picture in 2003 was dominated by American football fans. Globally, more than 93 million individuals watched the showdown between the Tampa Bay Buccaneers and the Oakland Raiders, with over 96 per cent of the total global viewership coming from American households.

Indeed, the two World Cups of 2003, Rugby and Cricket, both attracted far fewer viewers than the Super Bowl, in spite of their global, and potentially wider appeal. 23 million and 20 million individuals, respectively, watched the final of these two events, compared with over 93 million viewers who watched the Super Bowl.

Initiative's ViewerTrack™ report examines TV viewing for 2003's major sporting events, and reveals TV fans' popularity line-up to be: Super Bowl, Champions League Football, Formula One, World Athletics Championships, Rugby World Cup, Cricket World Cup, Tour de France, Wimbledon Lawn Tennis Championships, and the NBA finals.

Initiative has collected data from 49 of the major TV-viewing markets around the globe. Taken together, these markets account for over 90 per cent of TV households globally.



Press Release

Futures is the global media research division of Initiative Worldwide, a world leader in media management with a global network of 99 media agencies operating in 51 countries, across 5 continents. Initiative handles media strategy, planning and buying for leading marketers such as: Agfa, AOL, Elizabeth Arden, Bayer, Burger King, Calvin Klein Cosmetics, Dixons Europe, France Telecom, Interbrew, Johnson & Johnson, Nestlé, Patek Philippe,

PriceWaterhouseCoopers, Ricoh, Samsung, Unilever, Vertu (Nokia), VW Audi

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Please address any enquiries or requests for a full copy of Initiative Futures' ViewerTrack report and key findings on the biggest sporting events of 2003, to:

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ViewerTrack

Biggest Sporting Events of 2003

December 2003



Super Bowl is world's favourite

Introduction

The end of 2003 marks a good point at which to stop and reflect on the popularity of the world's major sporting events. Initiative Futures has already carried out extensive viewing analyses this year into the Formula 1 Championship and the Rugby and Cricket World Cups, and this report evaluates their popularity in light of the world's other major sporting events.

In addition to the aforementioned events, this ViewerTrack survey also monitored TV audiences for 2003's major global tournaments in American Football, Athletics, Basketball, Cycling, Football and Tennis. This has revealed wide international variations in the popularity of sport. The United States generated by far the greatest cumulative audience across all these events, with in excess of 100 million viewers, and the Super Bowl was the most popular of our nine surveyed events, with a global audience of 93 million individuals.

However, to place this in context, the final of 2002's Football World Cup was watched by 217 million individuals. The Football World Cup, Summer Olympic Games and European Football Championships are the world's three most popular sporting events, and these 'big three' dwarf all other sport tournaments.

Initiative conducts ViewerTrack analyses to help identify and select the most appropriate communication properties in the world of sport, by delivering truly accurate and timely insight into global viewing patterns. Viewing of sporting events is often misreported either due to a misunderstanding of the data or possibly vested interests. However, Initiative's neutral position and expertise in the communication research field delivers our clients accurate reporting and analysis.

Initiative is the world's largest communications agency, providing clients with effective communication solutions. Association with sport is one of the many potential routes to connect brands with their consumers. This enables advertisers to expand beyond traditional advertising and take advantage of communication areas including sponsorship, sports marketing and broadcast content provision.



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The nine featured events

Within each chosen sport, we selected the match or race that we believed to have been the most prominent in the leading tournament in that sport in 2003. For international consistency, we collected data from each market for the live broadcast only of each event. Those events were as follows:

American Football: NFL Super Bowl – Final

Athletics: IAAF World Athletics Championships - Men's 100 metres final

Basketball: NBA Finals – Game 6 Cricket: ICC Cricket World Cup – Final Cycling: Tour de France – Final stage Football: UEFA Champions League – Final

Formula 1: FIA World Championship - Brazilian Grand Prix

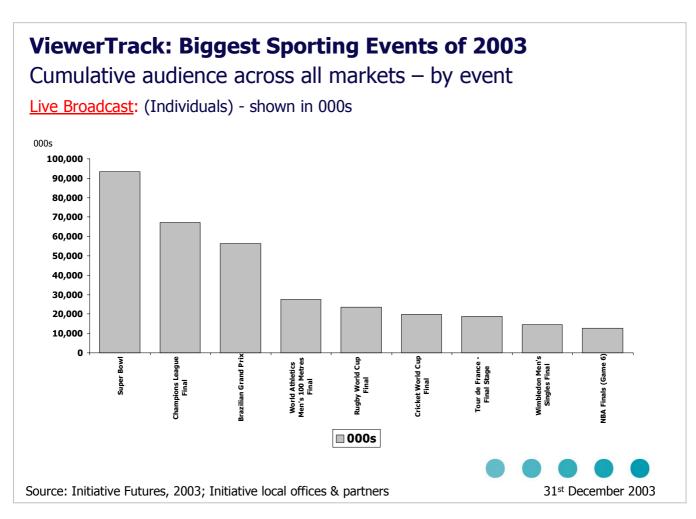
Rugby: IRB Rugby World Cup - Final

Tennis: Wimbledon Lawn Tennis Championships - Men's singles final



2003's biggest sporting event

By collecting data across 49 markets, we have been able to rank the nine selected events in order of popularity. The Super Bowl was easily the most popular event of the year, with a global audience of 93 million individuals.



Viewing data is added for each event as it becomes available, and totals may be adjusted retrospectively

The next biggest events of the year were the final of the Champions League, which attracted 67 million individuals, and then the Brazilian Grand Prix, the most popular of this season's Formula 1 races, with 56 million individuals.

Next came the final of the Men's 100 metres at the World Athletics Championships, with 28 million individuals, in fifth place the Rugby World Cup final, with 23 million viewers, and then the Cricket World Cup final, with 20 million viewers.

Bringing up the rear came the final stage of the Tour de France which featured the entry into Paris, with 19 million individuals, followed by the final of the Men's Singles at Wimbledon, watched by 15 million individuals, and then finally the last game of the NBA Finals between San Antonio and New Jersey, watched by only 12 million people.



Which sports are truly global?

The biggest sporting events are not necessarily those watched in the most markets. While the Super Bowl attracted the biggest audience, its audience was almost entirely located in the USA. Similarly, Americans dominated viewership of the NBA Finals. To assess which sports are truly global, we have calculated the percentage of the worldwide audience accounted for by the top three and top five markets for each of our surveyed events.

ViewerTrack: Biggest Sporting Events of 2003

Share (%) of global audience accounted for by biggest markets

Event	Biggest 3 markets	Biggest 5 markets
Cricket World Cup Final	98.4	100.0
Super Bowl	98.1	99.1
NBA Finals (Game 6)	95.4	97.3
Rugby World Cup Final	82.3	90.9
Tour de France	63.5	75.8
Wimbledon Men's Singles Final	58.4	77.0
Brazilian Grand Prix	51.9	75.4
Men's 100 Metres Final	48.9	67.6
Champions League Final	45.8	59.8

Source: Initiative Futures, 2003; Initiative local offices & partners

31st December 2003

Viewing data is added for each event as it becomes available, and totals may be adjusted retrospectively

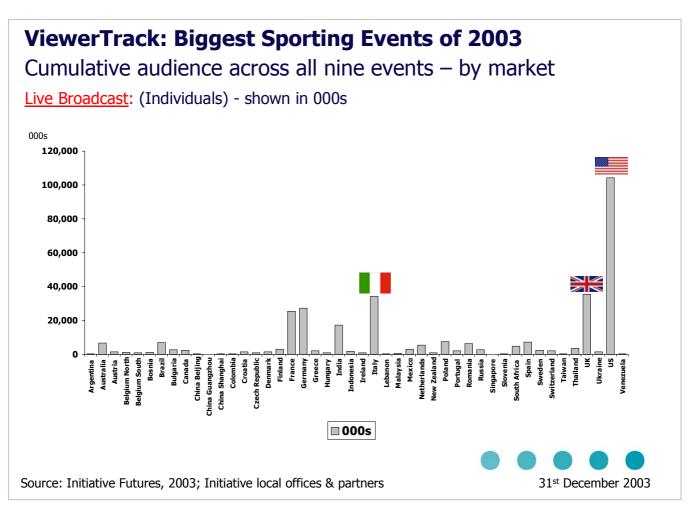
Defined in this way, the most 'global' of our nine surveyed events of 2003 was the Champions League final, with the top three markets accounting for 45.8% and the top five markets accounting for 59.8% of worldwide viewing, respectively.

It is important to consider the biggest sporting events in this light. Whilst the Super Bowl may attract the largest number of viewers in thousands, its audience is almost exclusively American. Other sports, such as football and Formula 1, have far wider international appeal.



The world's biggest sporting markets

The broadcast arrangements across our surveyed markets were varied, with a mixture of free-to-air / pay-TV and live / time-shifted broadcasts. As mentioned earlier, for the purposes of this survey, time-shifted broadcasts were excluded. Note that in some markets, a number of these leading sporting events were not even broadcast at all.



Viewing data is added for each event as it becomes available, and totals will be adjusted retrospectively

The top three markets were the USA (104,000,000 individuals), the UK (35,000,000 individuals) and Italy (34,000,000 individuals). Given that the fourth and fifth biggest markets were Germany and France, respectively, it is clear that the established sporting nations of the West with the largest populations and most comprehensive TV broadcast arrangements deliver the largest absolute audiences and greatest potential for advertisers to communicate with sports fans in significant numbers.

When expressed in terms of ratings¹, however, a far wider range of markets boast the largest viewing figures, as detailed for each event in their respective sections below.



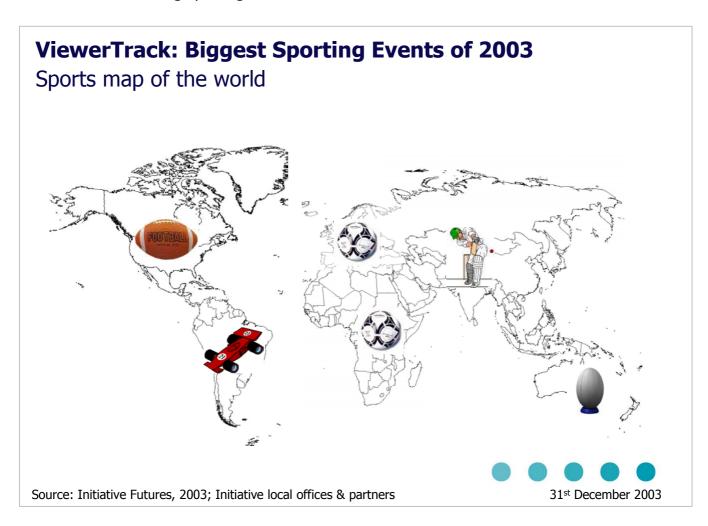


¹ All ratings referred to in this report relate to viewing figures for all individuals. A rating is the average percentage of the total TV-viewing population who viewed the programme.



Sports map of the world

By pulling together the viewing figures for each of our 49 surveyed markets, we have found which was the leading sporting event in each of the six continents.



The UEFA Champions League dominates in Europe and Africa, where football is the major sport. However, whilst football is a massive social and cultural experience for many in South America, the Champions League has little appeal there given that it only involves European club teams. When international football tournaments take place, however, football regains top spot in South America. With 2003 not having any major international football tournaments, Formula 1 comes out top instead in South America, aided by the convenient scheduling of the Brazilian Grand Prix in the early afternoon on a Sunday.

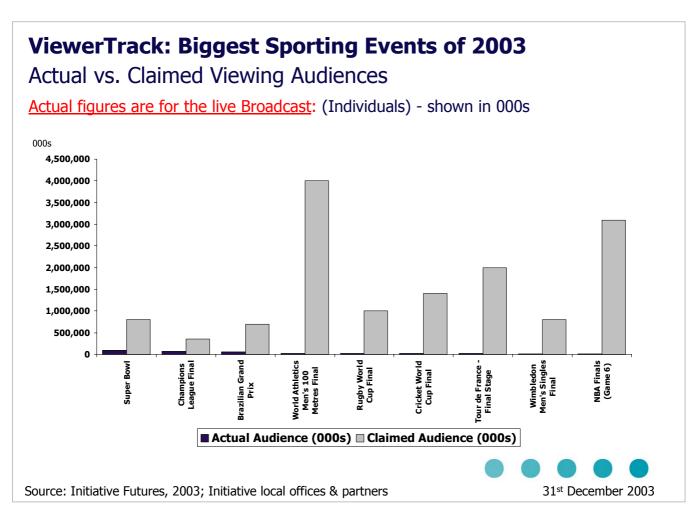
Given the popularity of the Super Bowl, American Football easily takes top spot in North America. Rugby is most popular in Oceania, particularly in a World Cup year with the tournament having taken place in Australia.

Cricket comes top in Asia. Even though a number of sports are trying to establish footholds in the lucrative Asian market, cricket is still the leading sport. Again, this was helped by the fact that 2003 was a World Cup year – and India reached the final.



How actual audience sizes differ from claimed viewing figures

One of the main reasons why Initiative conducts ViewerTrack analyses is to report the true level of interest in sporting events. The true audience can differ greatly from the claimed audience, as the table below shows.



Claimed data sources and explanation: See Appendix 2 (Page 19)

Although, as detailed in the Appendix, the comparison between actual and claimed audience figures for each of these events is not directly like-for-like in every case, an indication of the degree to which viewing figures are popularly overstated is clear. For some of these events, the actual audience is so many times smaller than the claimed audience that the actual audience cannot even be seen on a chart that has the same scale for both actual and claimed data!

Please read Appendices 1 and 2 (pages 18 and 19) for an explanation of why Initiative's figures are so different from those widely quoted in the press.

We now take a more detailed look at each of our surveyed events.

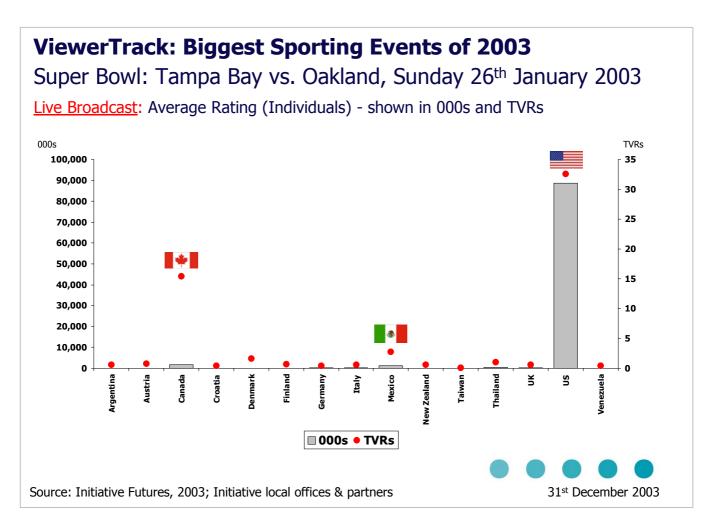


Super Bowl

Date: Sunday, 26th January 2003

Event: Tampa Bay Buccaneers vs. Oakland Raiders

The Super Bowl is the climax to the American Football season, and is the biggest event in the US sporting calendar. As a result, the match draws its highest audiences, both in absolute terms and in ratings, in the USA. There, it attracted 89 million individuals (32.6 ratings).



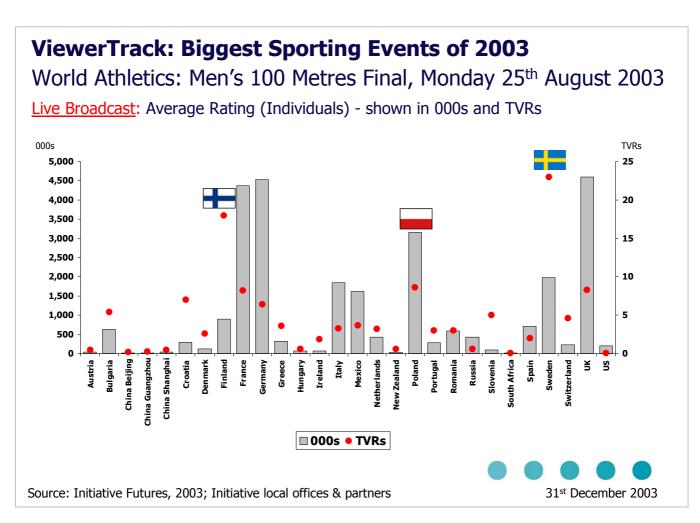
Although the Super Bowl was broadcast in a number of markets, as shown on the chart, viewing was very low outside of North America. The second and third biggest markets were Canada and Mexico, with 15.4 and 2.8 ratings, respectively. American Football is hardly played outside of these markets. This, combined with the unfavourable broadcast time (late Sunday night / early Monday morning) in the key European TV markets, meant that, whilst this was the single most popular sporting event of 2003, it did not enjoy truly global appeal.



World Athletics Championships

Date: Monday, 25th August 2003 Event: Men's 100 metres final

The World Athletics Championships is a biennial event for the world's top athletes, falling in odd-numbered years between the Summer Olympics and the Commonwealth Games. Arguably the most high-profile of all track and field events is the Men's 100 metres, and hence we collected global viewing data for the final of this race to give an indication of how popular the World Athletics Championships were.



The race was most popular, in terms of ratings, in Sweden (23.0 ratings), Finland (18.0 ratings) and Poland (8.6 ratings). France, the host nation of the Championships, achieved 8.2 ratings.

Outside of these three markets, all the biggest viewing audiences were to be found within Europe, which benefited from the convenient late evening broadcast time. The UK, with two participants in the final, managed a very creditable 8.3 ratings. In contrast, even though the USA is one of the most successful of all nations in athletics, and also had two finalists, only 195,000 individuals watched the race, during what for them was the middle of a Monday afternoon.

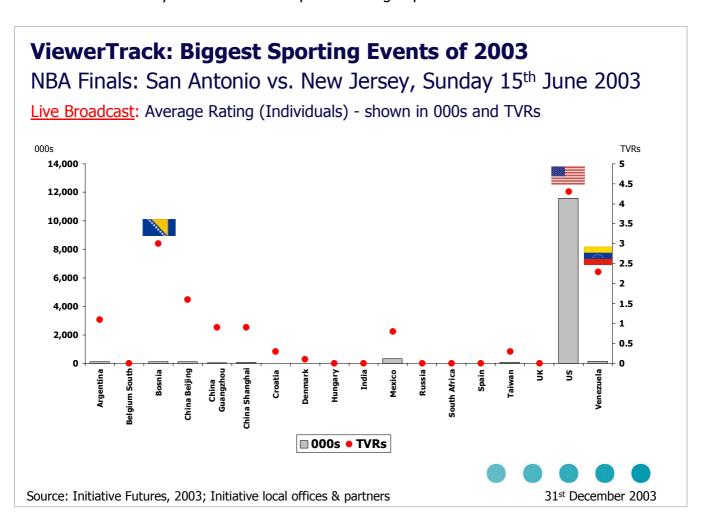


NBA Finals

Date: Sunday, 15th June 2003

Event: San Antonio Spurs vs. New Jersey Nets (Game 6)

The final of the annual US basketball finals is settled over a best-of-seven encounter. With San Antonio already 3-2 up after five games, the sixth game was a virtual final, with viewers knowing that if San Antonio won Game 6 they would be crowned NBA Champions. So we collected data for Game 6, the sixth and final game of the NBA Finals – the de facto final and hence likely to have been the peak viewing experience.



As with the Super Bowl, the NBA Finals were easily more popular in the USA than anywhere else. An average audience of 11.6 million individuals meant that it accounted for 96% of the global audience – exactly the same percentage as it did for the Super Bowl. However, Game 6 of the NBA Finals was nothing like as popular as the Super Bowl in the US – with 4.3 vs. 32.6 ratings, respectively. It must be remembered, however, that the basketball audience is dispersed over a number of matches because of the tournament format.

The match achieved notable audiences in Bosnia (3.0 ratings) and Venezuela (2.3 ratings). But perhaps the more significant audience for the future was the fourth-place positioning of China Beijing, with 1.6 ratings, coming off the instant impact made by Yao Ming in the NBA.

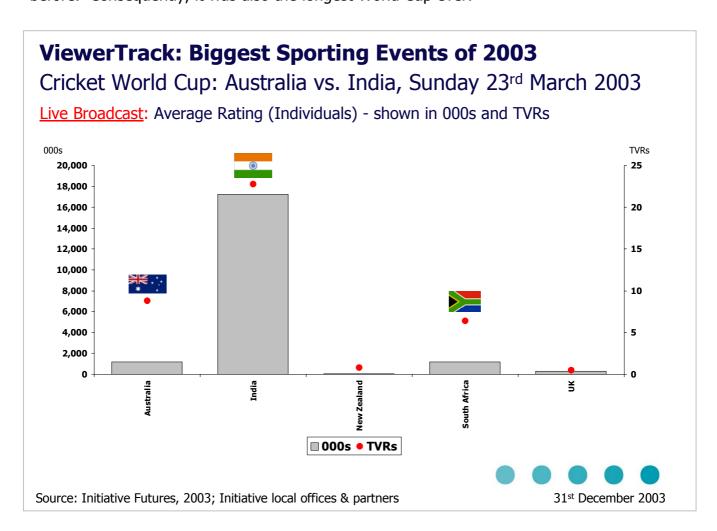


Cricket World Cup

Date: Sunday, 23rd March 2003

Event: World Cup Final – Australia vs. India

Cricket's version of the quadrennial World Cup extravaganza was based, at times controversially, on the African continent for the first time. By cricketing standards, it was a marathon of a World Cup, with more teams invited to play and more matches than ever before. Consequently, it was also the longest World Cup ever.



The protracted nature of the tournament arguably did not assist in attracting large TV audiences. Additionally, cricket is only played in a small number of countries, so the tournament's appeal was always going to be limited. However, cricket is the most popular sport in the world's second most populous country, India, and this, combined with the team's relatively unexpected success in reaching the final, meant that the match achieved 22.8 ratings there. The final continued well on into the night in Australia, the other finalist, restricting the average audience there to 8.8 ratings.

Even though South Africa, as one of the host nations, had been eliminated at the pool stage, over a million South Africans (6.4 ratings) still watched the final. Less than 300,000 individuals in the UK watched the final, on average, with the game broadcast on pay-TV.

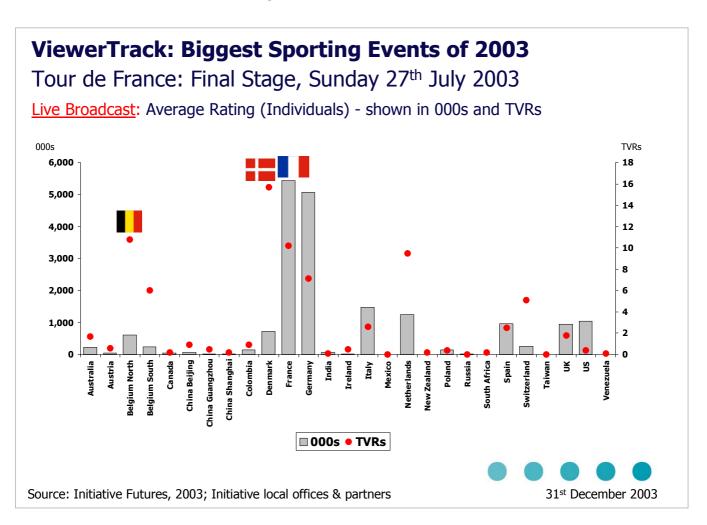


Tour de France

Date: Sunday, 27th July 2003

Event: Final Stage - Ville d'Avray to Paris

After navigating through all the highs and lows of the French countryside, the cyclists made their traditional finish along the Champs-Elysees. It was the final chance for the sprinters to show their wares and provided the scene of the coronation of Lance Armstrong in the yellow jersey in Paris for a record-equalling fifth occasion. As the climax to the three-week race, we collected data for this stage.



The final stage was most popular in the established cycling nations of Denmark (15.7 ratings), Belgium North (10.8 ratings) and France (10.2 ratings). The 'Local Hero Syndrome' is in evidence here, with past racers of the calibre of Bjarne Riis, Eddy Merckx and Jacques Anquetil hailing from those countries, respectively. The same principle also applied in the two next biggest markets, Netherlands and Germany, with past champions such as Joop Zoetemelk and Jan Ullrich.

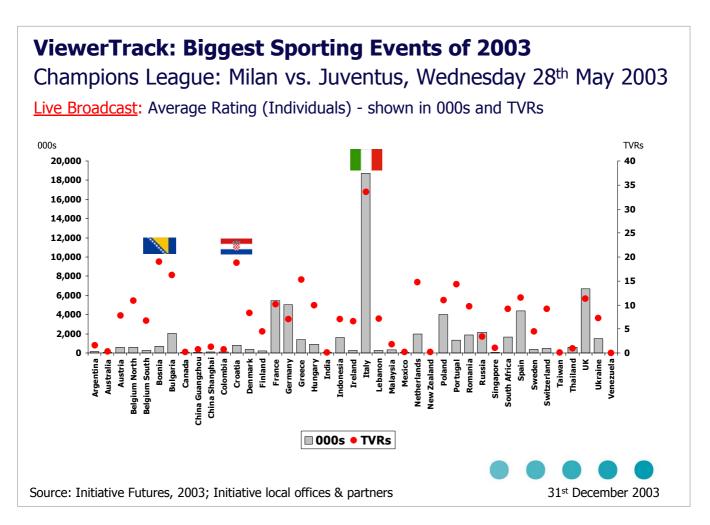
However, this was not the case for the USA. The final stage achieved only 0.4 ratings there, even as Lance Armstrong became the first ever man to complete five consecutive tour victories. Clearly the 'Local Hero Syndrome' isn't always enough to attract the viewers.



Champions League

Date: Wednesday, 28th May 2003 Event: Final – Milan vs. Juventus

The final of the biggest club competition in football was contested for the first time by two teams from the same country – Italy. Consequently, viewing figures in Italy were the highest of any market, with 33.6 ratings.



The second and third largest markets were Bosnia (19.0 ratings) and Croatia (18.8 ratings). However, viewing figures were consistently high for the match across a number of markets, particular in Europe. Of the 49 markets surveyed in this study, the Champions League final achieved the highest ratings of all nine featured events in as many as 20 of them.

The match proved to be particular popular in Eastern Europe. In addition to Bosnia and Croatia, the fixture achieved 16.3 ratings in Bulgaria and 15.3 ratings in Greece. It is notable how these viewing levels exceeded those in the traditional European football powers of Germany, Spain, the Netherlands and England.

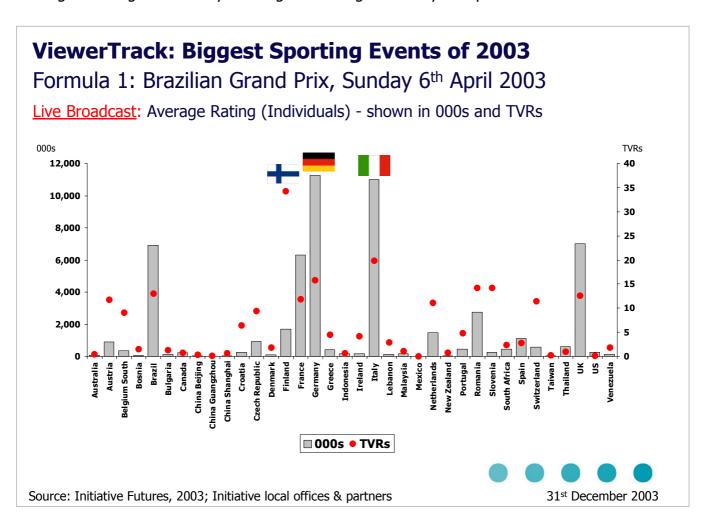
As a reflection of football's global appeal, the match even achieved 9.2 ratings in South Africa – making it more popular there than the finals of the Rugby and Cricket World Cups.



Formula 1

Date: Sunday, 6th April 2003 Event: Brazilian Grand Prix

Before embarking on its prolonged stay in Europe during the middle of the season, the Formula 1 jamboree made its annual port of call in Brazil. One of the more glamorous races, it proved to be the most popular of the season in terms of thousands of viewers, taking advantage of its early evening scheduling in the key European markets.



As was the case for the majority of the races during the 2003 season, F1 was most popular in Finland, Italy and Germany. The Brazilian Grand Prix achieved 34.2 ratings in Finland, 19.8 ratings in Italy and 15.8 ratings in Germany.

With these markets, plus Brazil, France and the UK consistently among the top viewing markets, the 'Local Hero Syndrome' effect is marked. These nations have historically, and continue to, provide a high percentage of all drivers and teams, and hence the sport arguably carries greatest resonance in those markets.

The same is true in other markets when they provide a driver – such as in Hungary where the 2003 surge in viewing was nearly ten times higher when Zsolt Baumgartner was racing.

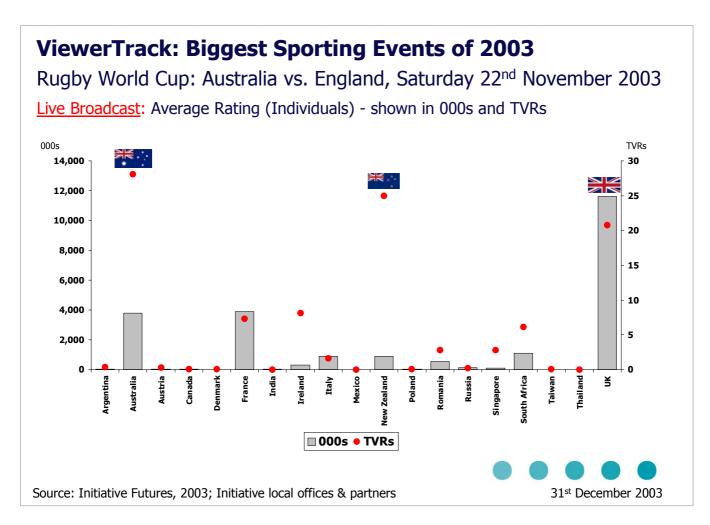


Rugby World Cup

Date: Saturday, 22nd November 2003

Event: World Cup Final – Australia vs. England

The biggest ever Rugby World Cup in terms of number of matches reached its conclusion in a classic showdown between old rivals Australia and England.



With the tournament having been held in Australia, it is little surprise that average ratings were highest there and in New Zealand. The final took place in the morning local time in Europe and South Africa, typically less popular times of the day to watch TV.

Hence, even though England won the tournament, average ratings were higher in both Australia (28.1 ratings) and New Zealand (25.0 ratings) than in the UK (20.8 ratings). Yet this was still the biggest audience achieved by the Rugby World Cup in the UK since the 1991 World Cup Final, when UK viewing figures benefited from having been the host nation and the match having been played in the afternoon, rather than the morning.

Viewing levels in the two other big rugby markets, France and South Africa, were much lower. They only managed 7.3 and 6.1 ratings, respectively. For France, this represented a decline of over 50% from its peak audience for their semi-final against England.

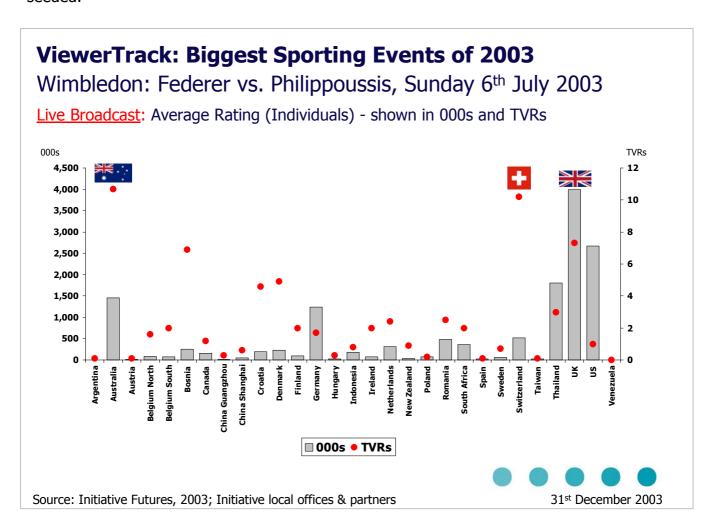


Wimbledon

Date: Sunday, 6th July 2003

Event: Men's singles final – Roger Federer vs. Mark Philippoussis

The Wimbledon men's singles final was played between two relatively unfancied players at the start of the Championships. Mark Philippoussis was a real outside bet, not even being seeded.



Without the biggest box-office draws (the likes of Lleyton Hewitt or Andre Agassi) in the final, the match proved most popular in the home countries of the two protagonists: Philippoussis's Australia (10.7 ratings) and Federer's Switzerland (10.2 ratings). Next came the host nation, the UK, with 7.3 ratings.

Aided by being broadcast at a convenient time of day, the next biggest markets were all European: Bosnia (6.9 ratings), Denmark (4.9 ratings) and Croatia (4.6 ratings).

Interest in tennis in those two nations currently dominating the women's game, namely the USA and Belgium, was not translated into high viewing figures for the men's final. Neither country achieved more than 2.0 ratings for the men's final.



Appendices

1. How Initiative's approach differs from other published reports

ViewerTrack Methodology

ViewerTrack reports are only produced thanks to the efforts of TV researchers and planners throughout our global network. 49 markets have provided the data to form a report that gives an unrivalled insight into TV viewing and a truly international perspective. Taken together, these markets account for over 90 per cent of the world's TV households.

Markets Covered:

Americas	Europe, Middle East, Africa (EMEA)	Asia and Oceania
Argentina, Brazil, Canada, Chile, Colombia, Mexico, Peru, Uruguay, USA, Venezuela	Austria, Belgium (north and south), Bosnia, Bulgaria, Croatia, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Lebanon, Netherlands, Poland, Portugal, Romania, Russia, Slovenia, South Africa, Spain, Sweden, Switzerland, UAE, UK, Ukraine	Australia, China (Beijing, Guangzhou and Shanghai regions), India, Indonesia, Malaysia, New Zealand, Singapore, Taiwan, Thailand

This analysis is based on live broadcasts only. Time-shifted broadcast, summary programmes and highlights have not been included in order to maintain international consistency.

Ratings (GRP/TVR) and <u>Viewers</u> (000s) in this report are for average minute-by-minute viewing of the broadcast. ViewerTrack always quotes average ratings across the entire length of a broadcast, for the sake of consistency and for greater accuracy when considering the value of sporting events from an advertising and sponsorship perspective. This is in contrast to the cumulative viewing data quoted by some companies in the sports industry (i.e. totalling all the viewers who watched the event at all, regardless for how long). This is a very important distinction to draw since minute-by-minute data is the standard approach used in establishing industry standard trading currencies worldwide.



2. Sources for claimed viewing figures statistics

Super Bowl -

http://www.superbowl.com/news/story/6125222

"An estimated worldwide audience of 800 million will watch the NFL crown a new champion"

Champions League -

http://sportsillustrated.cnn.com/soccer/news/2002/05/15/realmadrid bayerleverkusen/

"(The 2002 Champions League final between Real Madrid and Bayer Leverkusen) was watched by a worldwide TV audience of 350 million"

Formula 1 -

Peter Sharkey, Sunday Times, 2nd March 2003

"Television viewing figures are estimated to average 700 million for every race"

World Athletics Championships -

http://www.sportsvenue-technology.com/projects/2005_athletics/

"(The 2005 World Athletics Championships) will be broadcast to more than 180 countries with a cumulative worldwide TV audience of more than 4 billion viewers"

Tour de France -

http://www.photoreporter.com/2002/07-15/tour_de_france.html

"(The Tour de France has) a 2 billion TV audience in Europe, Japan and the USA," according to Robert E. Striano, president and CEO of Konica Photo Imaging

Rugby World Cup -

http://www.planet-

rugby.com/TOURNAMENTS/World Cup 2003/Tournament News/story 31090.shtml

"The opening ceremony of the Rugby World Cup ... will be broadcast, it is estimated, to a billion viewers throughout the world"

Cricket World Cup -

http://www.dispatch.co.za/2003/02/10/southafrica/gcup.html

"A TV audience of 1.4 billion worldwide was estimated to have watched the opening (ceremony)"

Wimbledon -

Ryan Parry, The Mirror, 28th June 2003

"(Wimbledon has) a worldwide TV audience of 800 million"

NBA Finals -

http://www.nba.com/finals2003/reachworldwide.html

"The NBA Finals 2003 ... will reach more than 3.1 billion people around the world through NBA Entertainment's television, Internet, film and digital technologies"



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