

Baltic Media Advertising Market 2011



Advertising Expenditure 2011

Baltic summary



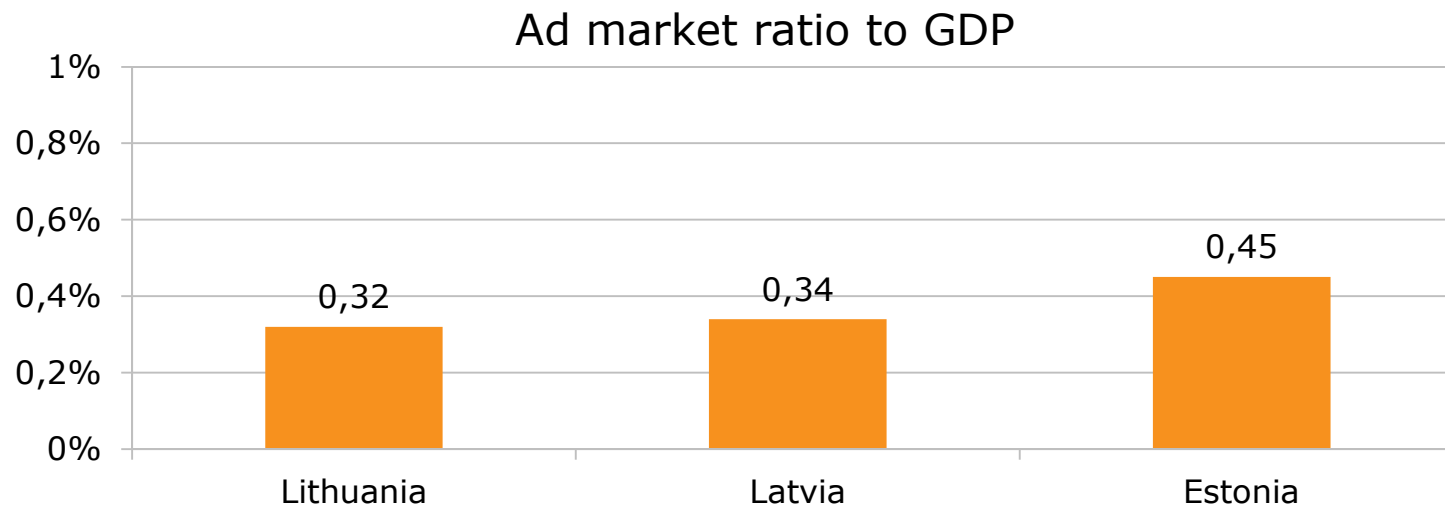
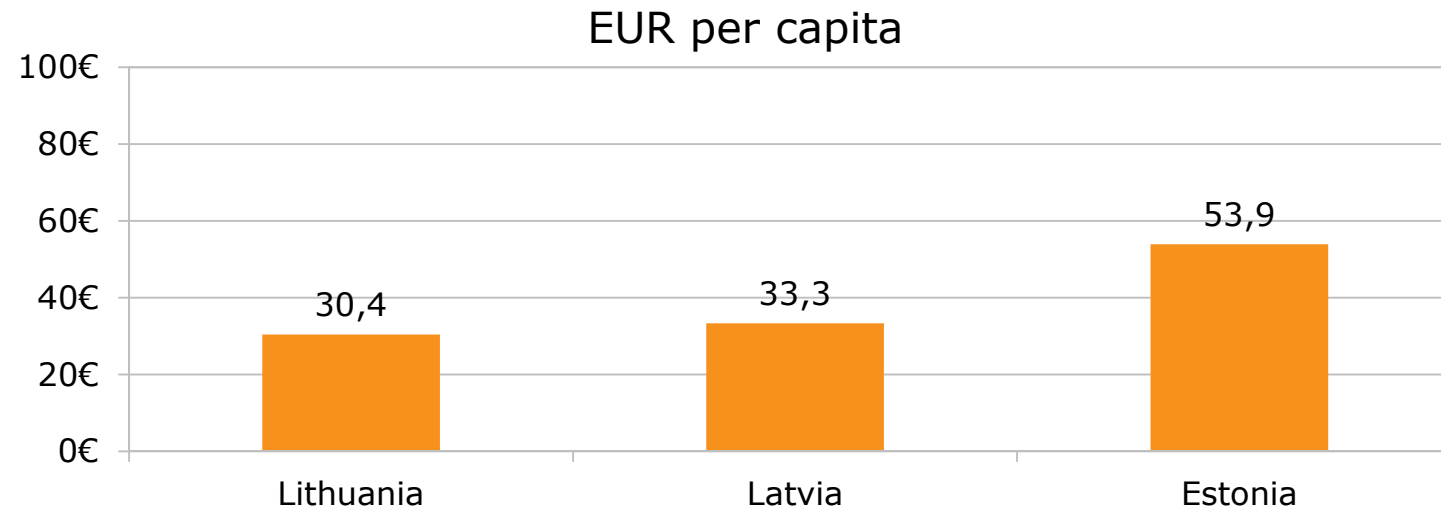
- Baltic Total 239,8 million EUR
- Change in 2011 6%

	LITHUANIA	LATVIA	ESTONIA
TOTAL (million EUR)	98,7 million EUR	68,9 million EUR	72,2 million EUR
TOTAL (local currency)	340,7 million LTL	48,390 million LVL	
Change % in local currency	5%	5%	9%

Source: Kantar Media.
 Estonia: TNS Emor;
 Latvia: TNS Latvia, LAA;
 Lithuania: TNS LT

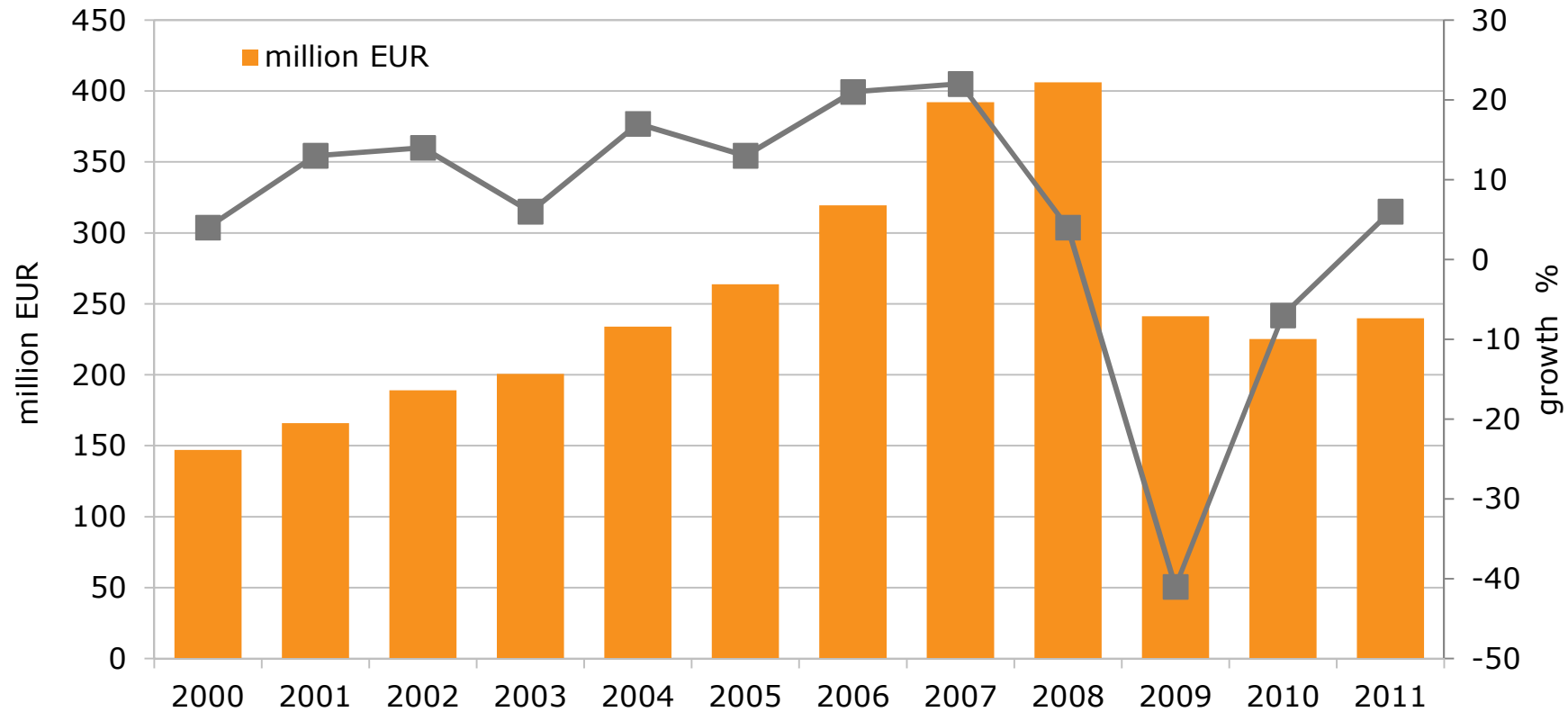


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Source: Kantar Media.
Estonia: TNS Emor;
Latvia: TNS Latvia, LAA;
Lithuania: TNS LT

Advertising Expenditure 2000-2011 Baltic Trend



Source: Kantar Media.
Estonia: TNS Emor;
Latvia: TNS Latvia, LAA;
Lithuania: TNS LT



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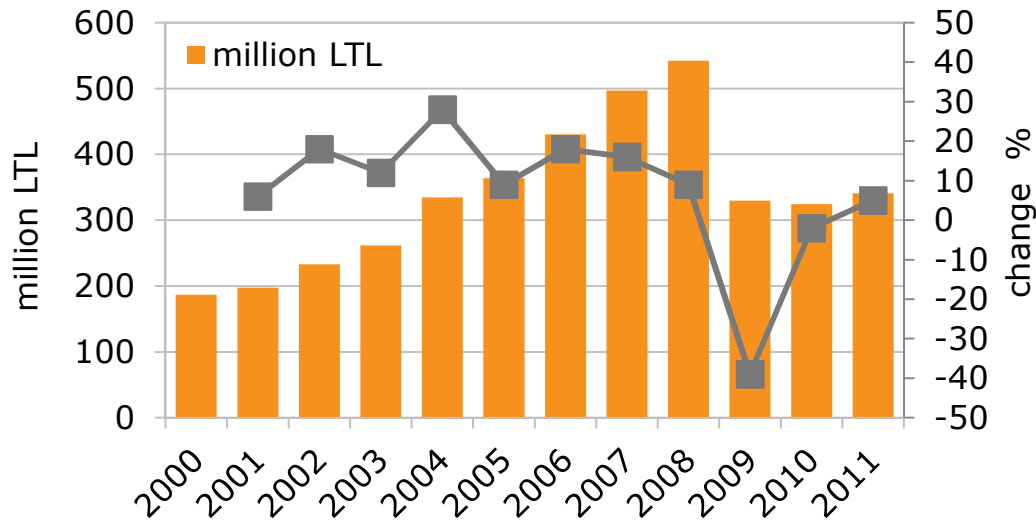
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Advertising Expenditure 2011

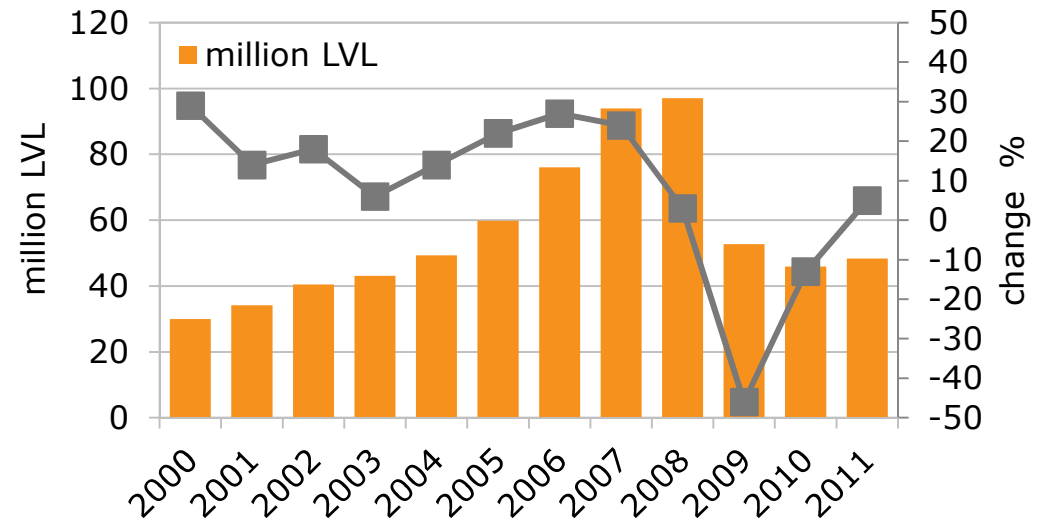
Trends per country



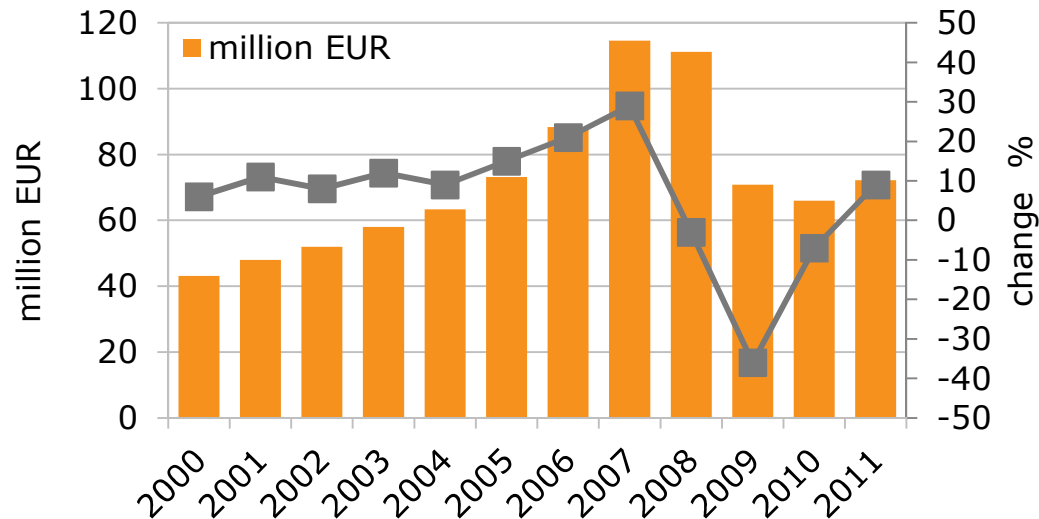
Lithuania



Latvia



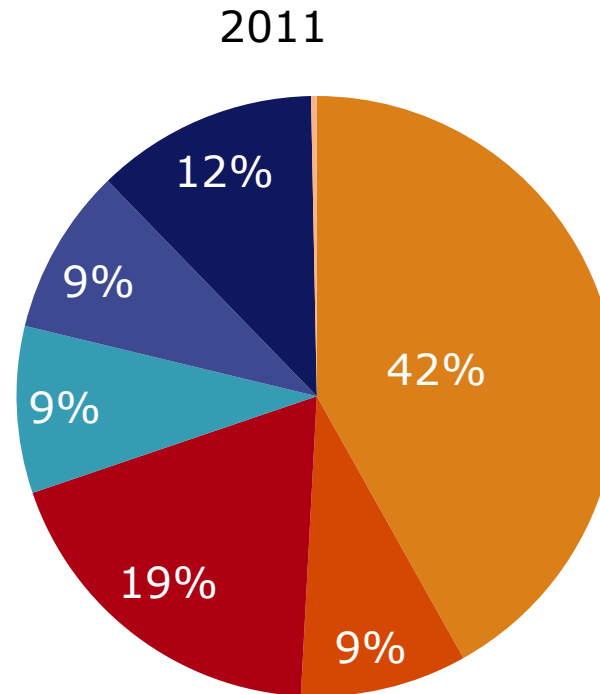
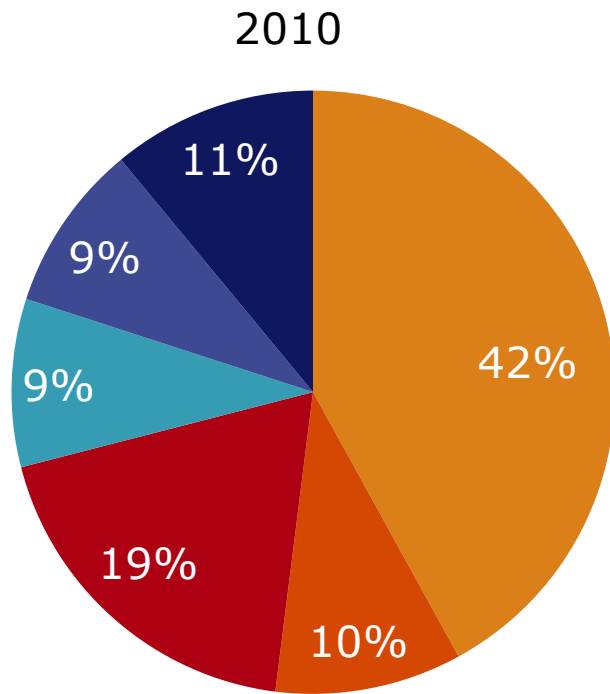
Estonia



Source: Kantar Media.
 Estonia: TNS Emor;
 Latvia: TNS Latvia, LAA;
 Lithuania: TNS LT



Distribution of Advertising Expenditure 2010 Baltic shares



change of media types
2011 vs 2010

TV	6,6%
Radio	3,4%
Newspapers	1,8%
Magazines	8,1%
Outdoor	6,7%
Internet	15,1%
Cinema	-12,9%

Share of Cinema was 0,3% both years

Source: Kantar Media.
Estonia: TNS Emor;
Latvia: TNS Latvia, LAA;
Lithuania: TNS LT



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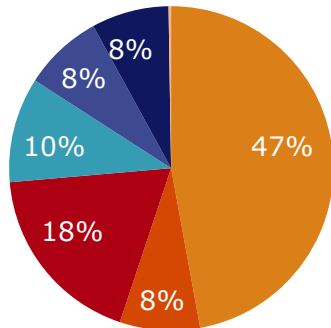
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Distribution of Advertising Expenditure 2011

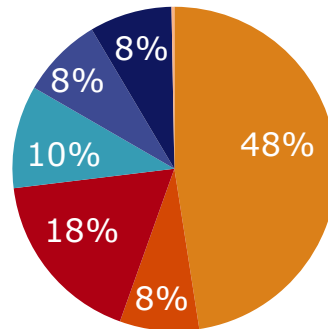
Shares per country



Lithuania 2010



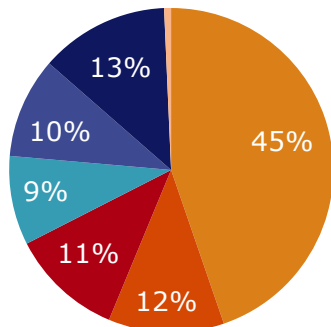
Lithuania 2011



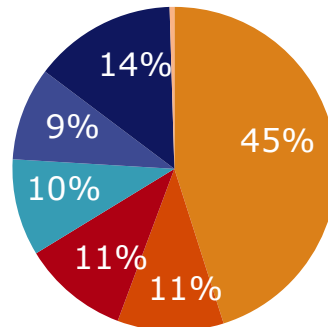
change of media types
2011 vs 2010

TV	5,9%
Radio	3,8%
Newspapers	0,0%
Magazines	2,9%
Outdoor	7,8%
Internet	12,0%
Cinema	11,1%

Latvia 2010

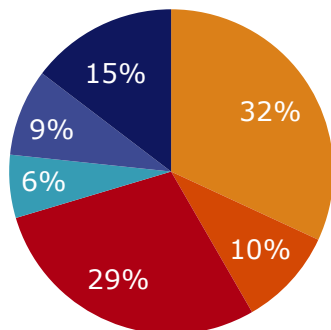


Latvia 2011

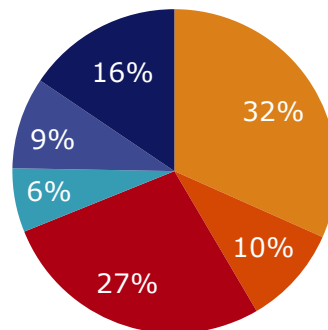


TV	6,3%
Radio	-3,3%
Newspapers	-0,5%
Magazines	14,7%
Outdoor	-1,9%
Internet	16,7%
Cinema	-26,8%

Estonia 2010



Estonia 2011



TV	8,5%
Radio	10,7%
Newspapers	4,3%
Magazines	11,1%
Outdoor	15,2%
Internet	16,0%
Cinema	NA

Source: Kantar Media.
Estonia: TNS Emor;
Latvia: TNS Latvia, LAA;
Lithuania: TNS LT

TOP 10 Advertisers



LITHUANIA	LATVIA	ESTONIA
TELE2	TELE2	ELISA EESTI
PROCTER&GAMBLE	PROCTER & GAMBLE	TELE2 EESTI
OMNITEL	LMT	PROCTER&GAMBLE
MAXIMA LT	BITE	EMT
HENKEL	MAXIMA	RIMI BALTIC
UNILEVER	RIMI	SELVER
BITÉ	HENKEL	SWEDBANK
KRAFT FOODS	L'OREAL	TALLINK GRUPP
PALINK	UNILEVER	SAKU ÕLLETEHAS
OLIFÉJA	KRAFT FOODS	INFO-AUTO

Note: Lithuania by gross; Latvia and Estonia by net expenditures

Source: Kantar Media. Estonia: TNS Emor; Latvia: TNS Latvia, LAA; Lithuania: TNS LT



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TOP 10 Product Groups (2nd level)



LITHUANIA	LATVIA	ESTONIA
MOBILE COMMUNICATION	MOBILE COMMUNICATION	RETAIL IN GENERAL
RETAIL IN GENERAL	RETAIL IN GENERAL	CARS
REMEDIES	REMEDIES	MOBILE COMMUNICATION
ALCOHOLIC BEVERAGES	FINANCIAL INSTITUTIONS, SERVICES	FINANCIAL INSTITUTIONS, SERVICES
FINANCIAL INSTITUTIONS, SERVICES	TELECOMMUNICATION	CONCERTS, FESTIVALS, SHOWS
CONCERTS, FESTIVALS, SHOWS	FOOD PRODUCTS-OTHER	BUILDING MATERIALS
SWEETS, CONFECTIONERY	SWEETS, CONFECTIONERY	REMEDIES
HOUSEHOLD HYGIENE	HOUSEHOLD HYGIENE	ALCOHOLIC BEVERAGES
MEDICAL SERVICE, INSTITUTIONS	ALCOHOLIC BEVERAGES	TELECOMMUNICATION
HAIR CARE	CARS	PASSENGER TRANSPORT

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Media Intelligence in the Baltics

What we offer?



Advertising monitoring

- media types covered - television, newspapers and magazines, radio, outdoor, internet and cinema (only in Lithuania)

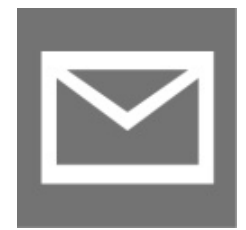
Clipping service

- television and print media,
- radio and internet (only in Latvia and Lithuania)
- outdoor (only in Lithuania)

News monitoring

- Lithuania - continuous news monitoring in television, print media, radio and internet
- Estonia, Latvia – news monitoring is conducted on ad hoc basis

Contact us!



ESTONIA

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