

Baltic Media Advertising Market 2005

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Advertising Expenditure 2005

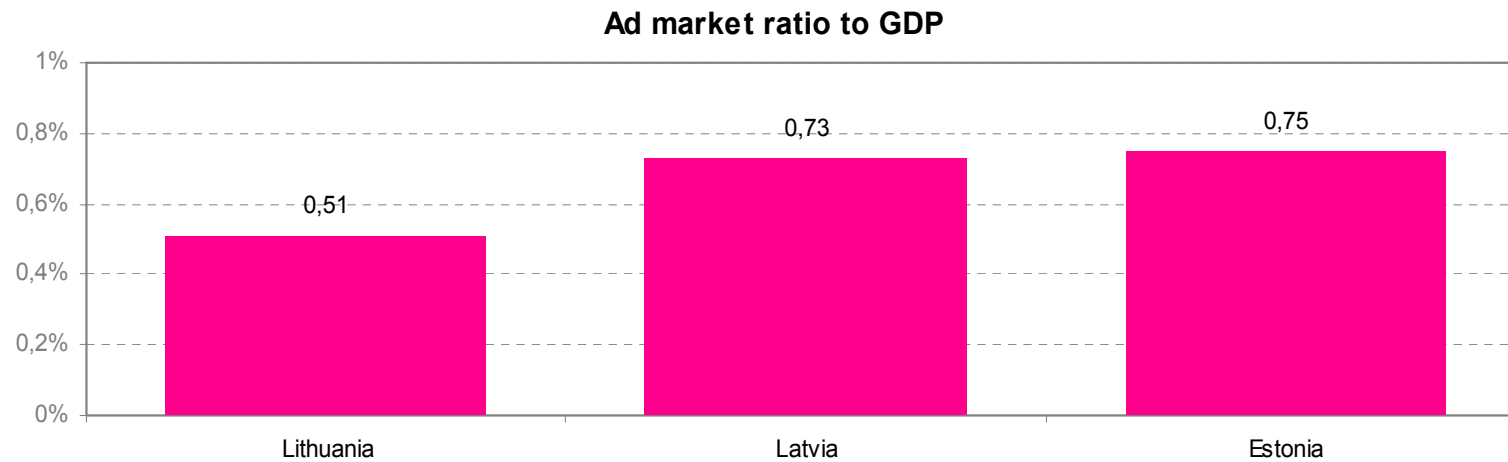
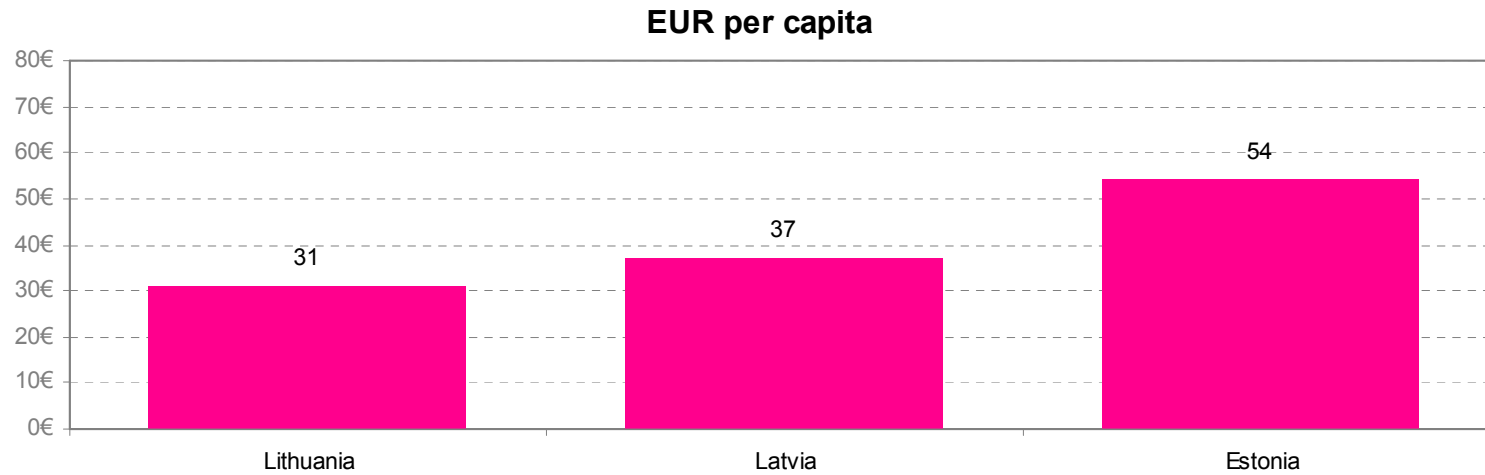
- Global Total – 423 billion EUR (340 billion US \$)
- Baltic Total – 264 million EUR
 - Growth in 2005 +13%

	Lithuania	Latvia	Estonia
TOTAL (million EUR)	105.4 million EUR	85.2 million EUR	73.2 million EUR
TOTAL (local currency)	363.6 million LTL	59.8 million LVL	1145 million EEK
Growth % in local currency	+9%	+22%	+15%

Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

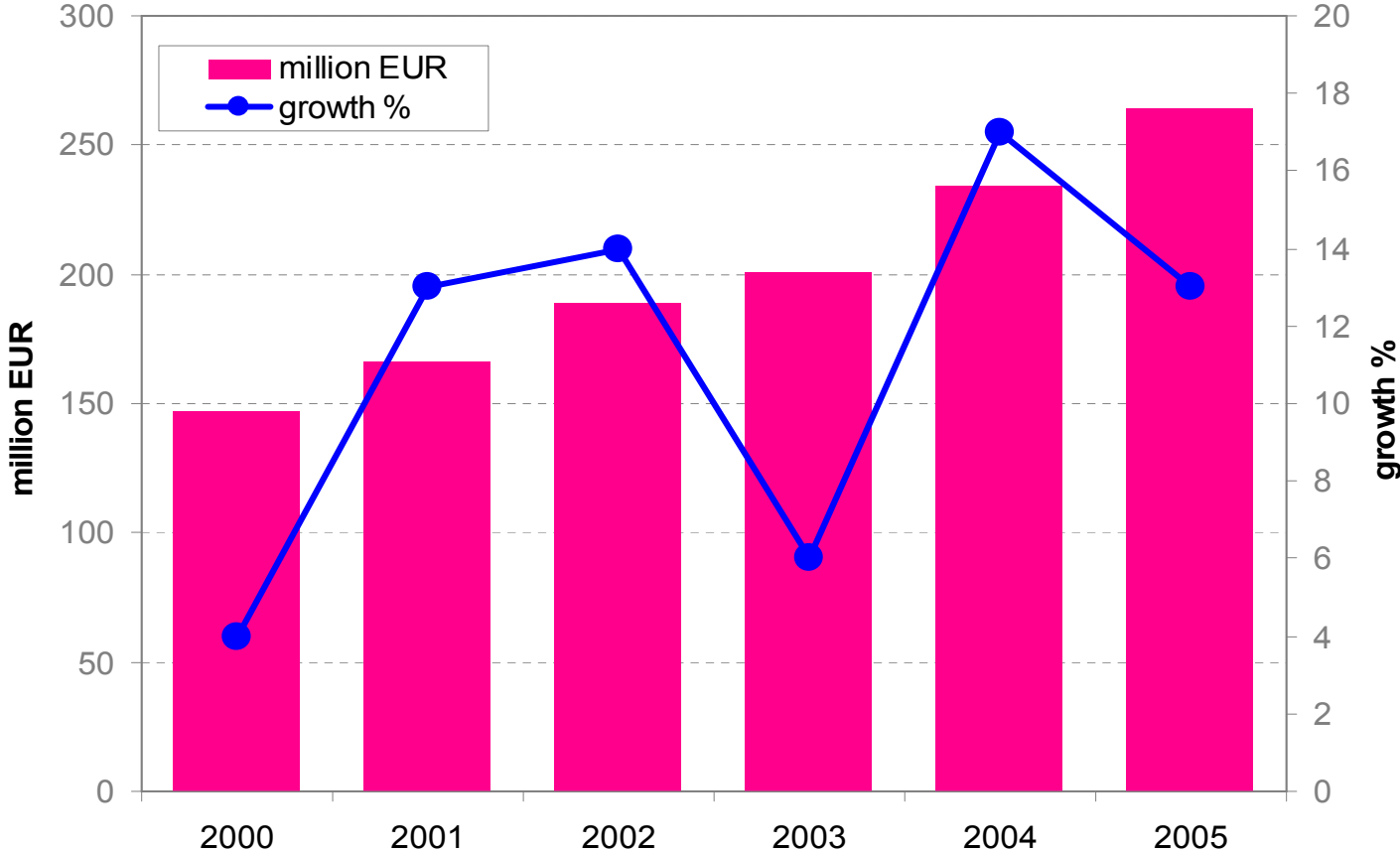


Advertising Expenditure 2005



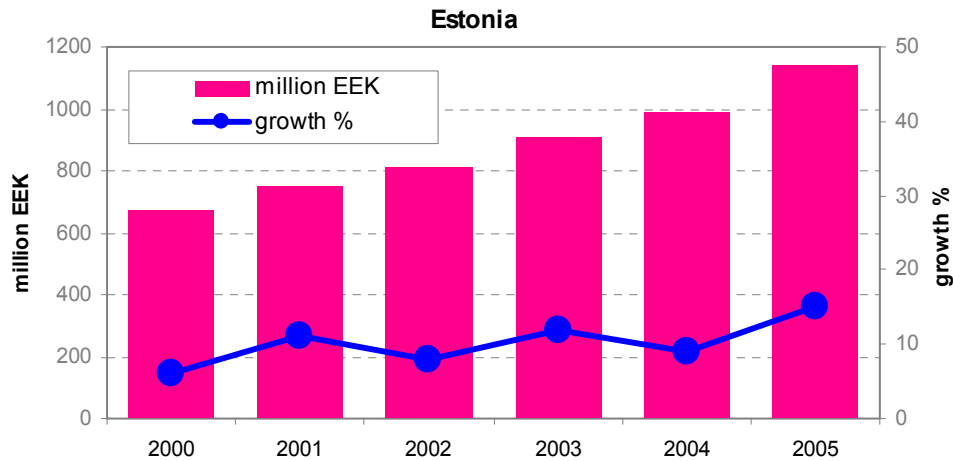
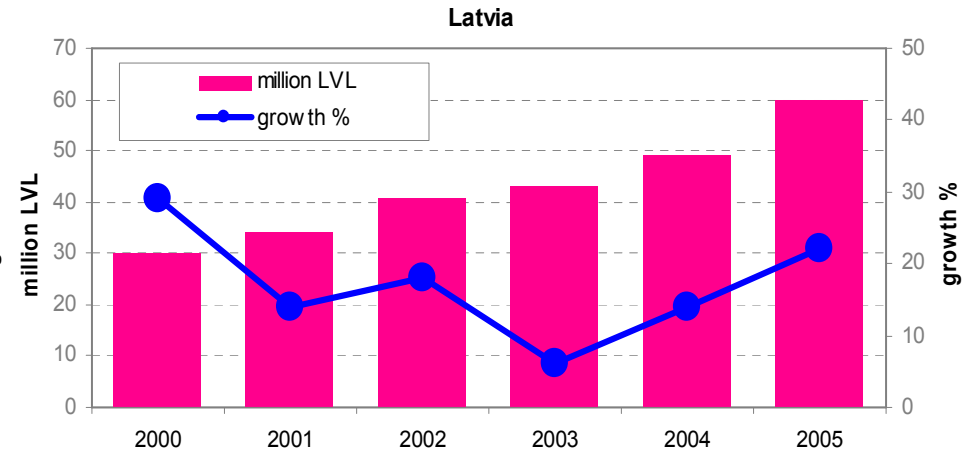
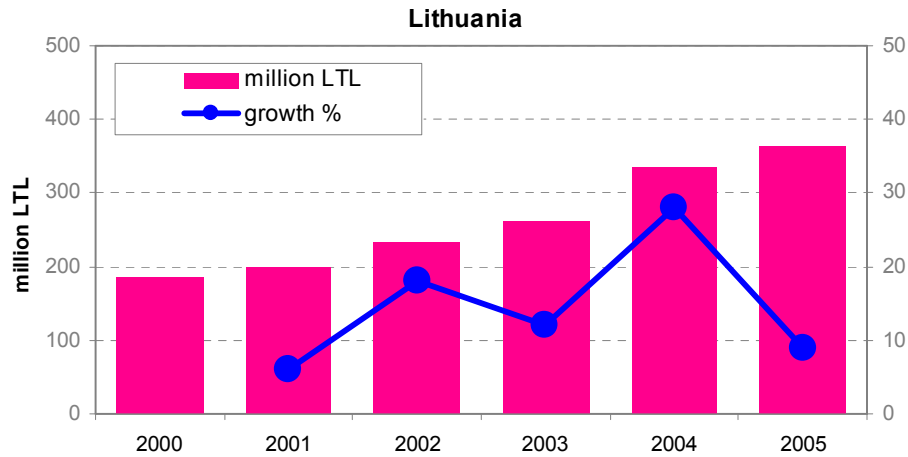
Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

Advertising Expenditure 2000-2005 - Baltic Total



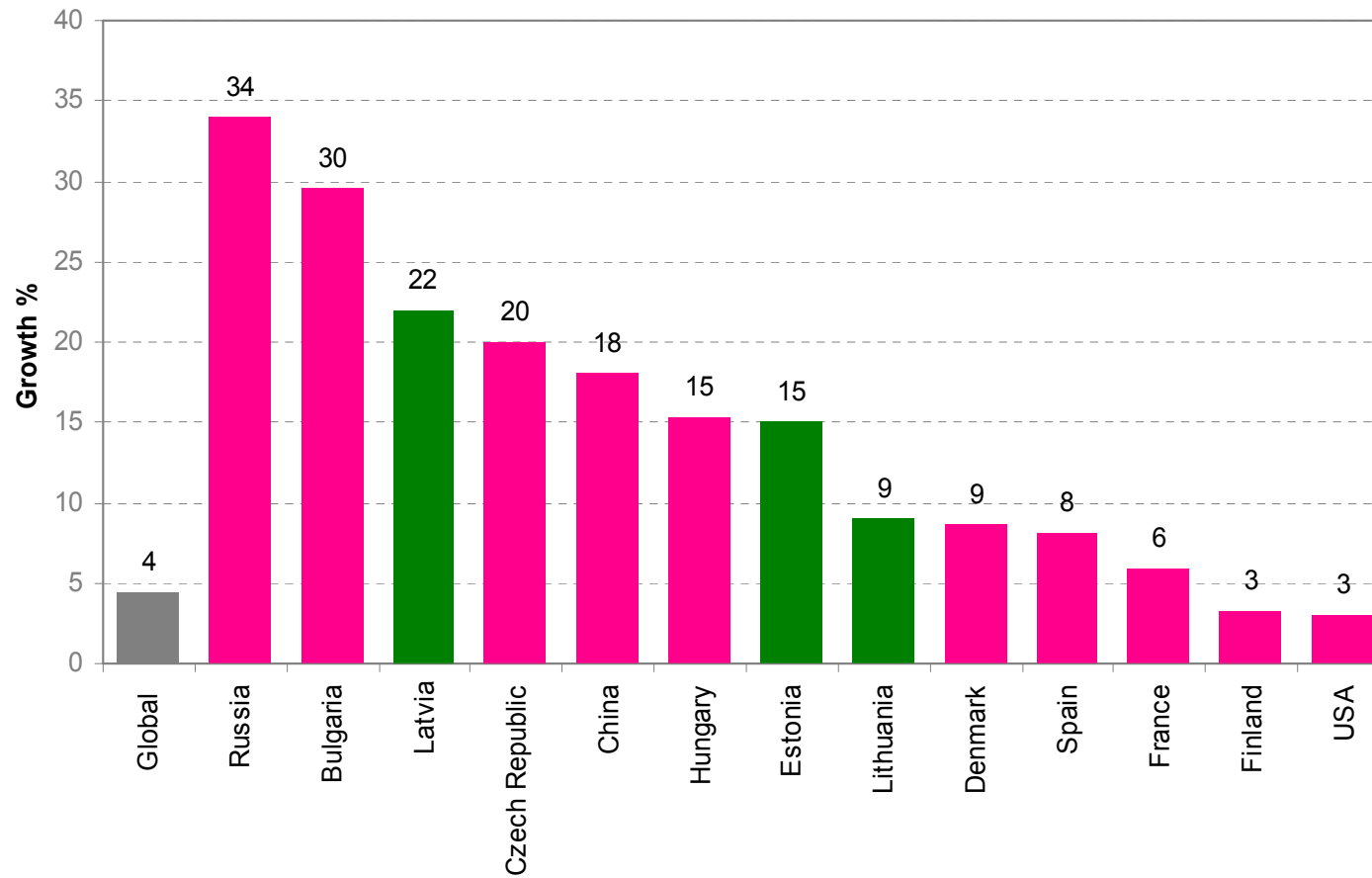
Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

Advertising Expenditure 2000-2005



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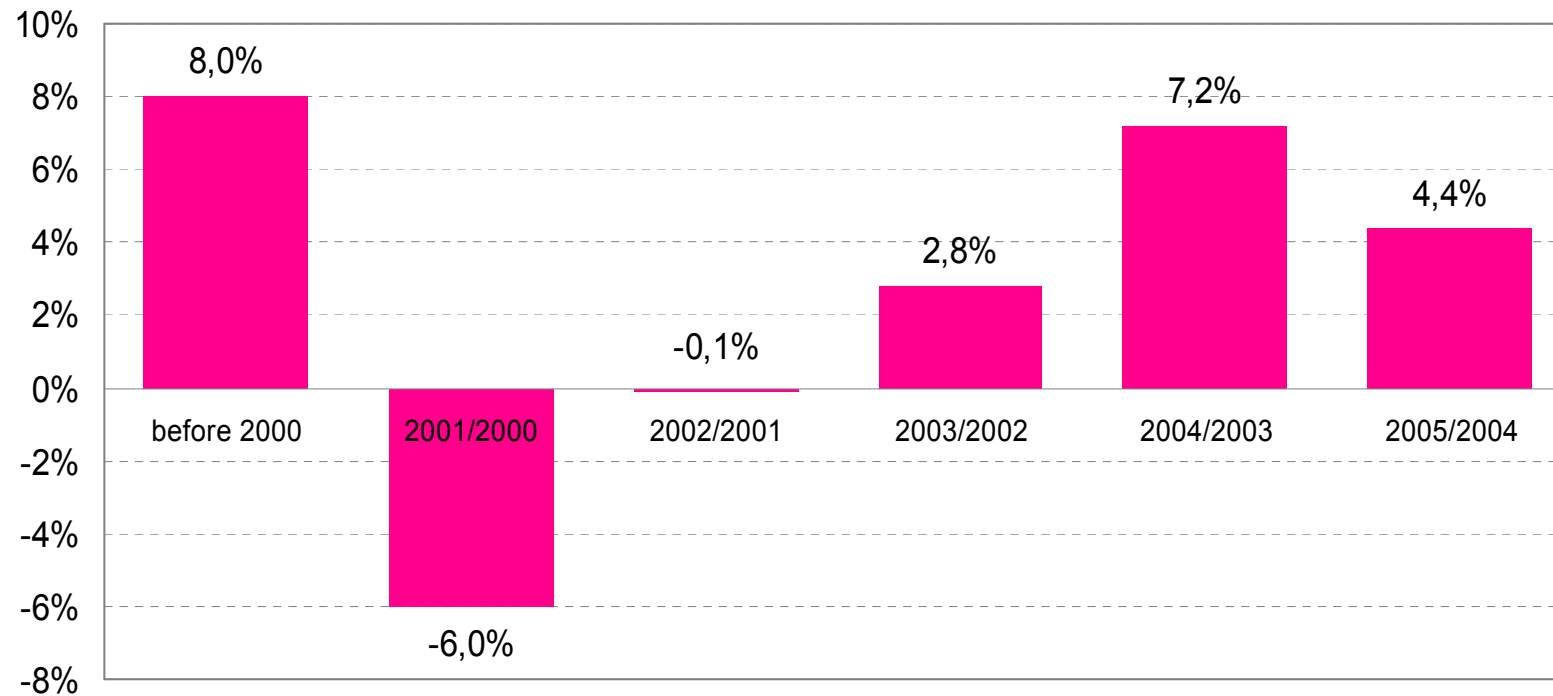
Changes in Selected Countries



Source: TNS Media Intelligence

World-wide Ad expenditures trends

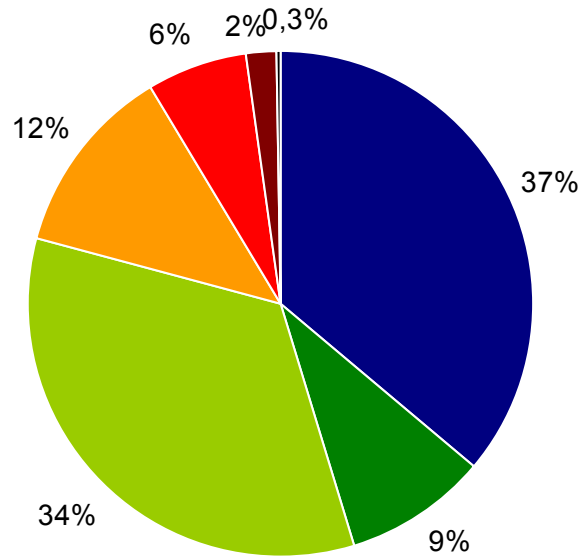
% change versus previous year



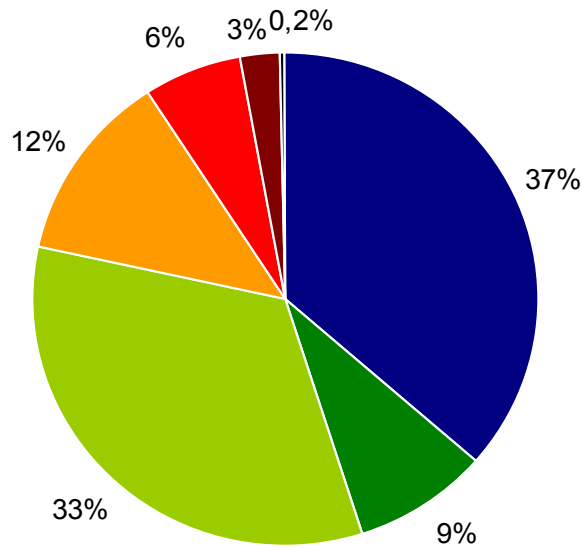
Source: TNS Media Intelligence

Distribution of Advertising Expenditure 2005

Baltic total 2004



Baltic total 2005



growth of media channels
2004 vs 2005

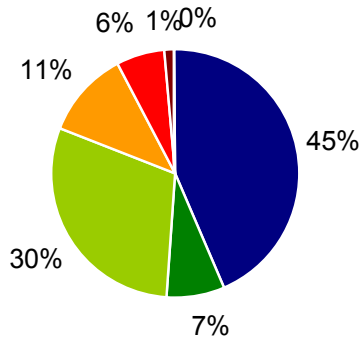
- TV – 13,4%
- Radio – 7,1%
- Newspapers – 11,2%
- Magazines – 14,6%
- Outdoor – 11,6%
- Internet – 56,0%
- Cinema – 21,8%



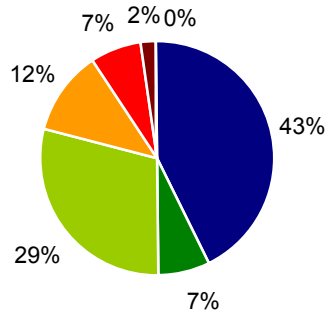
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Distribution of Advertising Expenditure 2005

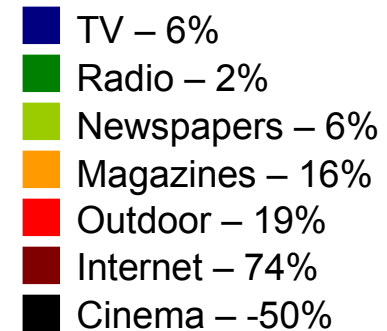
Lithuania 2004



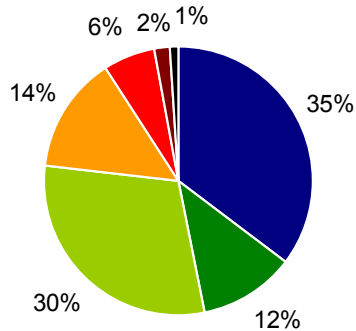
Lithuania 2005



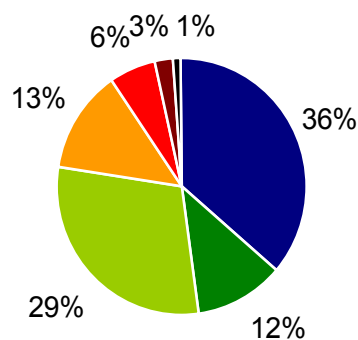
growth of media channels 2004 vs 2005



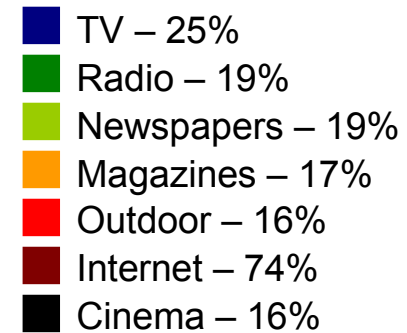
Latvia 2004



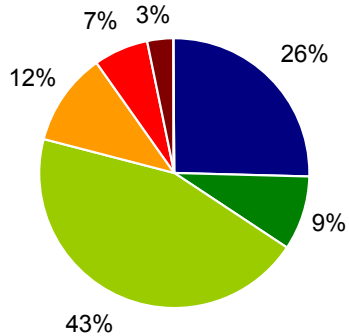
Latvia 2005



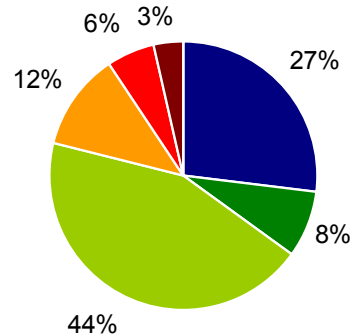
growth of media channels 2004 vs 2005



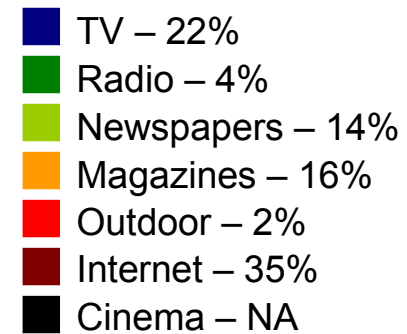
Estonia 2004



Estonia 2005



growth of media channels 2004 vs 2005



Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

TOP 10 Advertisers

LITHUANIA	LATVIA	ESTONIA
PROCTER&GAMBLE	PROCTER&GAMBLE	PROCTER&GAMBLE
TELE2	LMT	EMT
OMNITEL	MODERN TIMES GROUP	HANSAPANK
BITĖ	TELE2	RIMI BALTIC
RECKITT-BENCKISER	RECKITT-BENCKISER	TELE2
VP MARKET	COCA-COLA HBC	COCA-COLA HBC
ŠVYTURYS-UTENOS ALUS	RIMI BALTIC	A-SELVER
BERLIN-CHEMIE	VP MARKET	ELISA MOBIILSIDETEENUSED
COLGATE-PALMOLIVE	COLGATE-PALMOLIVE	RECKITT-BENCKISER
DANONE GROUP	UNILEVER	L'OREAL

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



Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

TOP 10 Product Groups

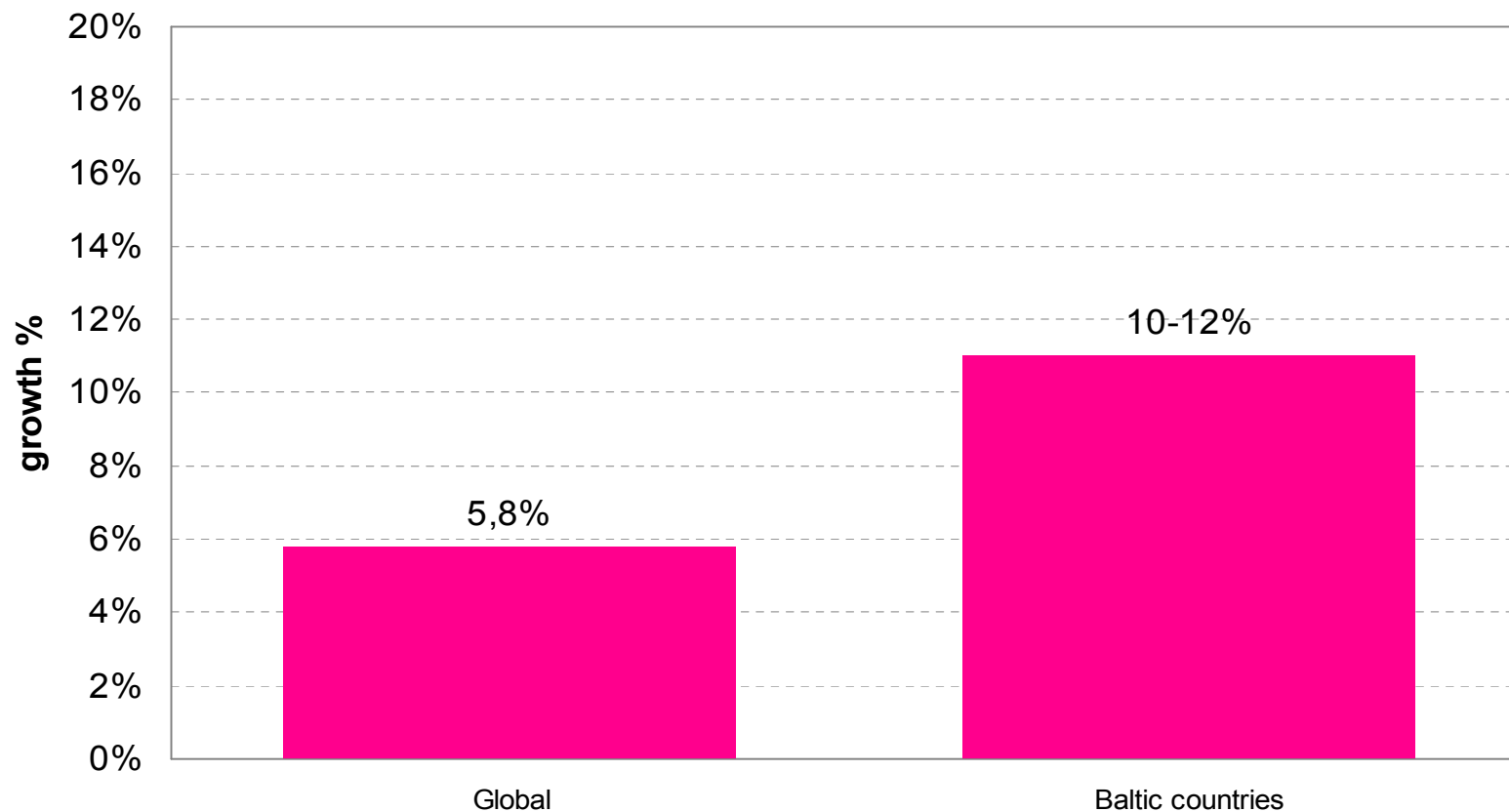
LITHUANIA	LATVIA	ESTONIA
MOBILE COMMUNICATION	MOBILE COMMUNICATION	MOBILE COMMUNICATION
REMEDIES	FINANCIAL INSTITUTIONS, SERVICES	CARS
RETAIL	ELECTRONIC MEDIA	RETAIL
HOUSEHOLD HYGIENE	HOUSEHOLD HYGIENE	JOB OFFERS
ALCOHOLIC BEVERAGES	RETAIL	FINANCIAL INSTITUTIONS, SERVICES
COLD DRINKS	REMEDIES	CONCERTS, FESTIVALS, SHOWS
HAIR CARE	CARS	REMEDIES
SWEETS, CONFECTIONERY	CONCERTS, FESTIVALS, SHOWS	ALCOHOLIC BEVERAGES
FINANCIAL INSTITUTIONS, SERVICES	FOOD PRODUCTS - OTHER	HOUSEHOLD HYGIENE
ORAL CARE	ALCOHOLIC BEVERAGES	REAL ESTATE

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Ad expenditures forecast for 2006



Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

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

Contact us!

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