

Baltic Media Advertising Market 2006

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Advertising Expenditure 2006

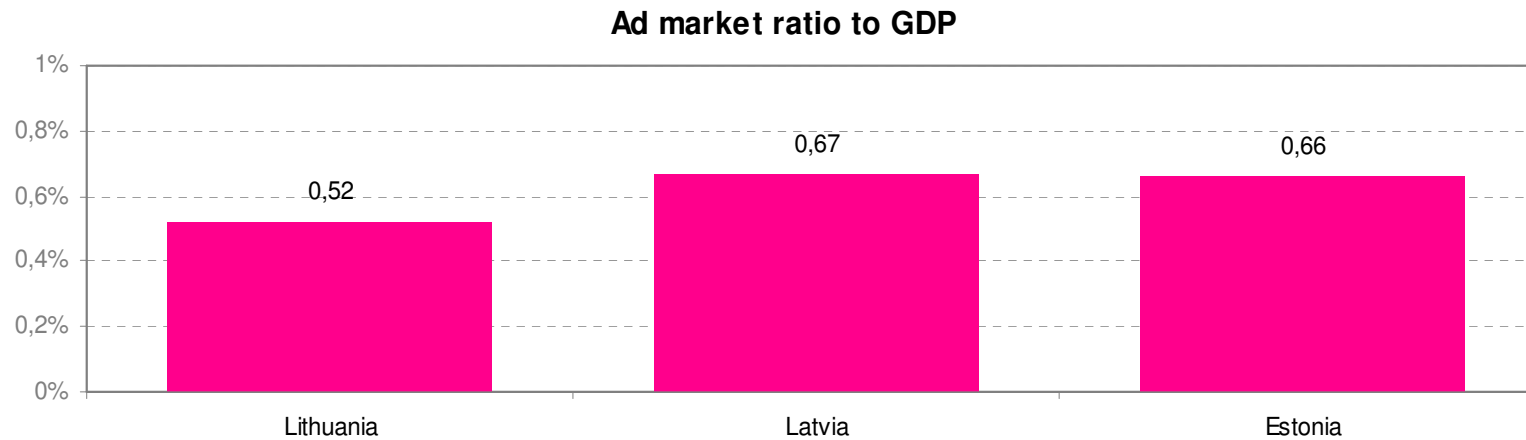
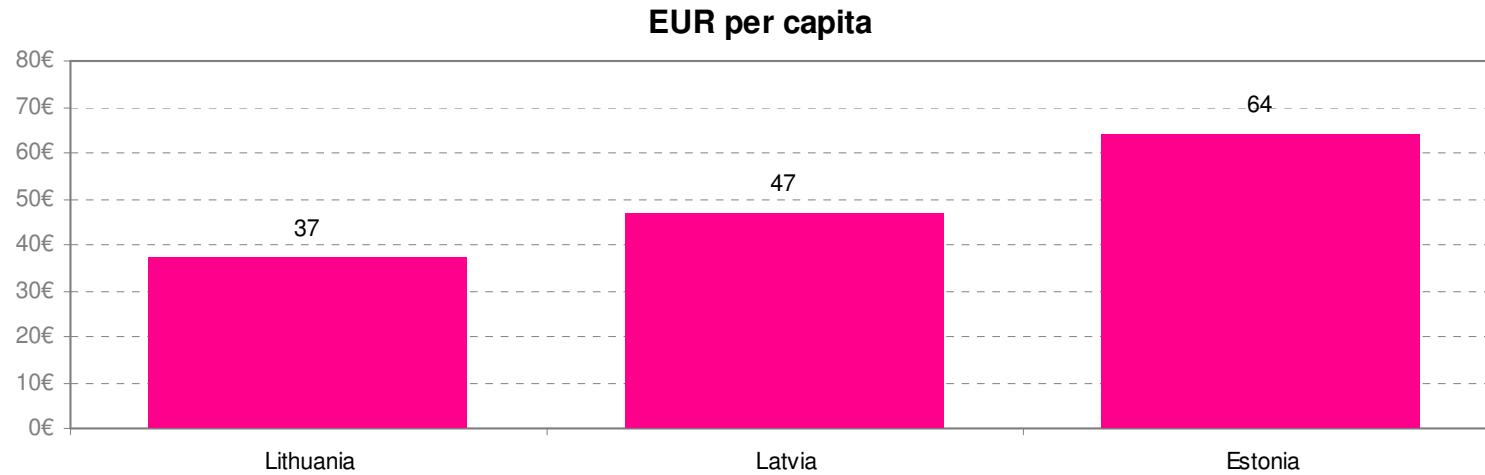
- Global Total – **316 billion** EUR (400 billion US \$)
- Baltic Total – 319,5 million EUR
 - Growth in 2006 +21%

	Lithuania	Latvia	Estonia
TOTAL (million EUR)	124,7 million EUR	108,2 million EUR	86,6 million EUR
TOTAL (local currency)	430,1 million LTL	76,0 million LVL	1355 million EEK
Growth % in local currency	+18 %	+27 %	+18 %

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

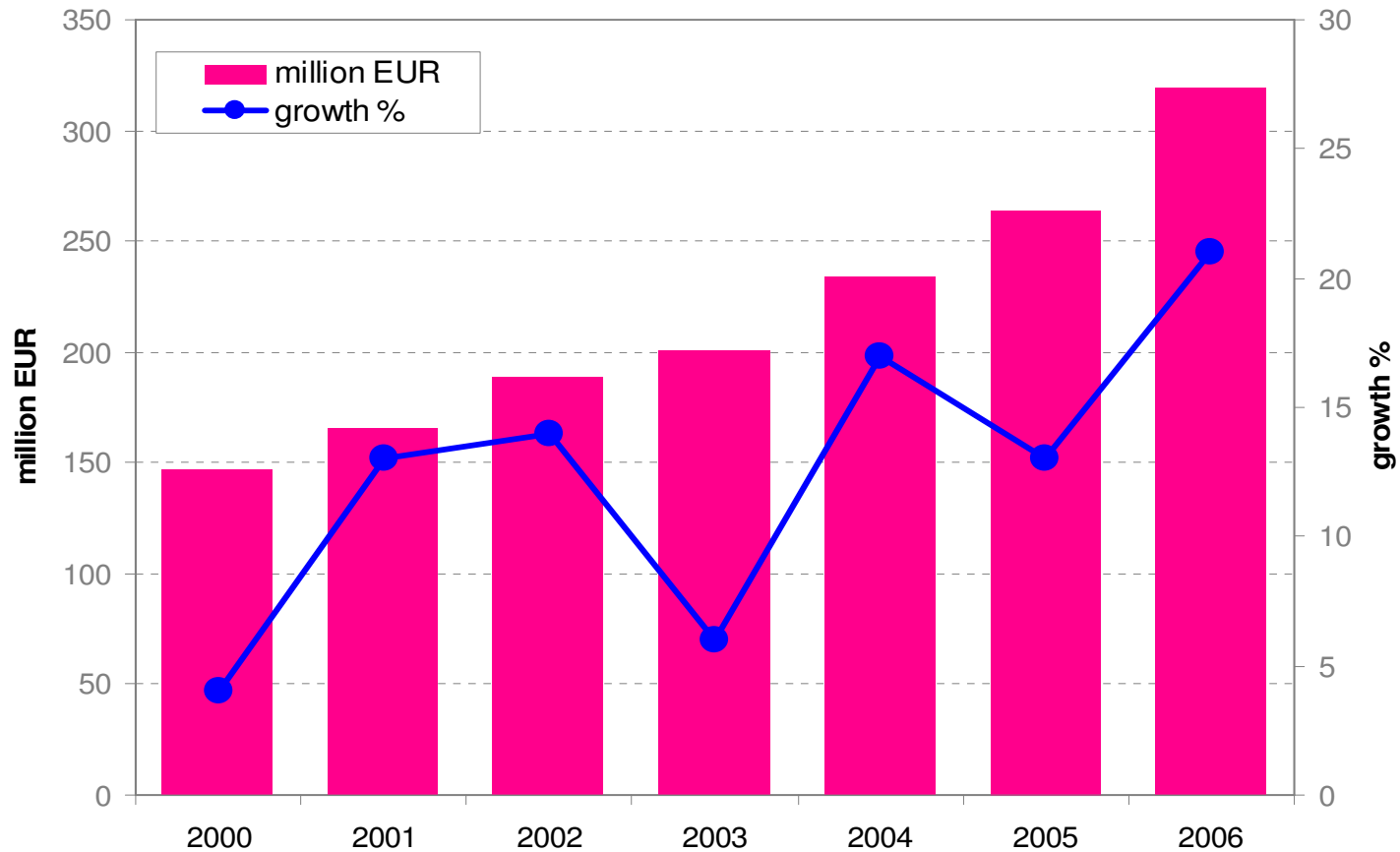


Advertising Expenditure 2006



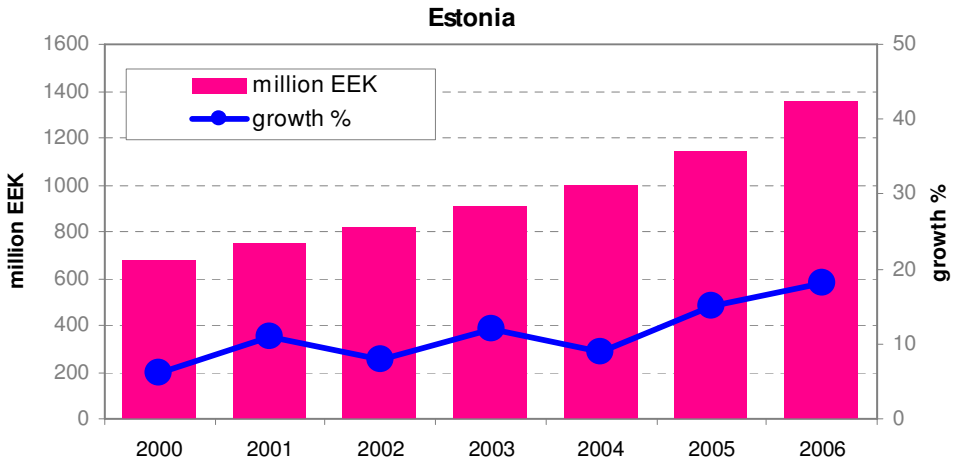
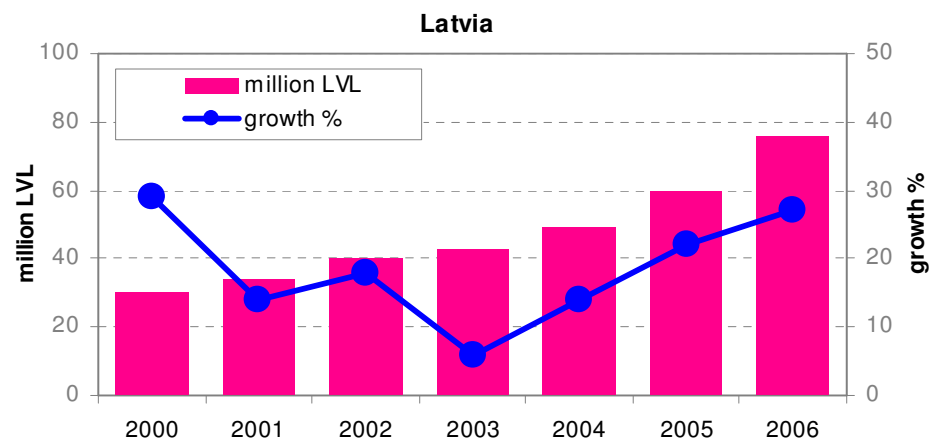
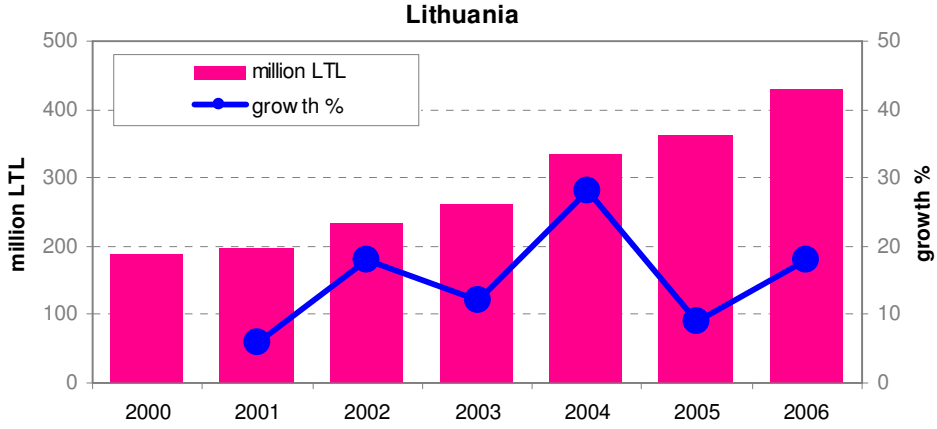
Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

Advertising Expenditure 2000-2006 - Baltic Total



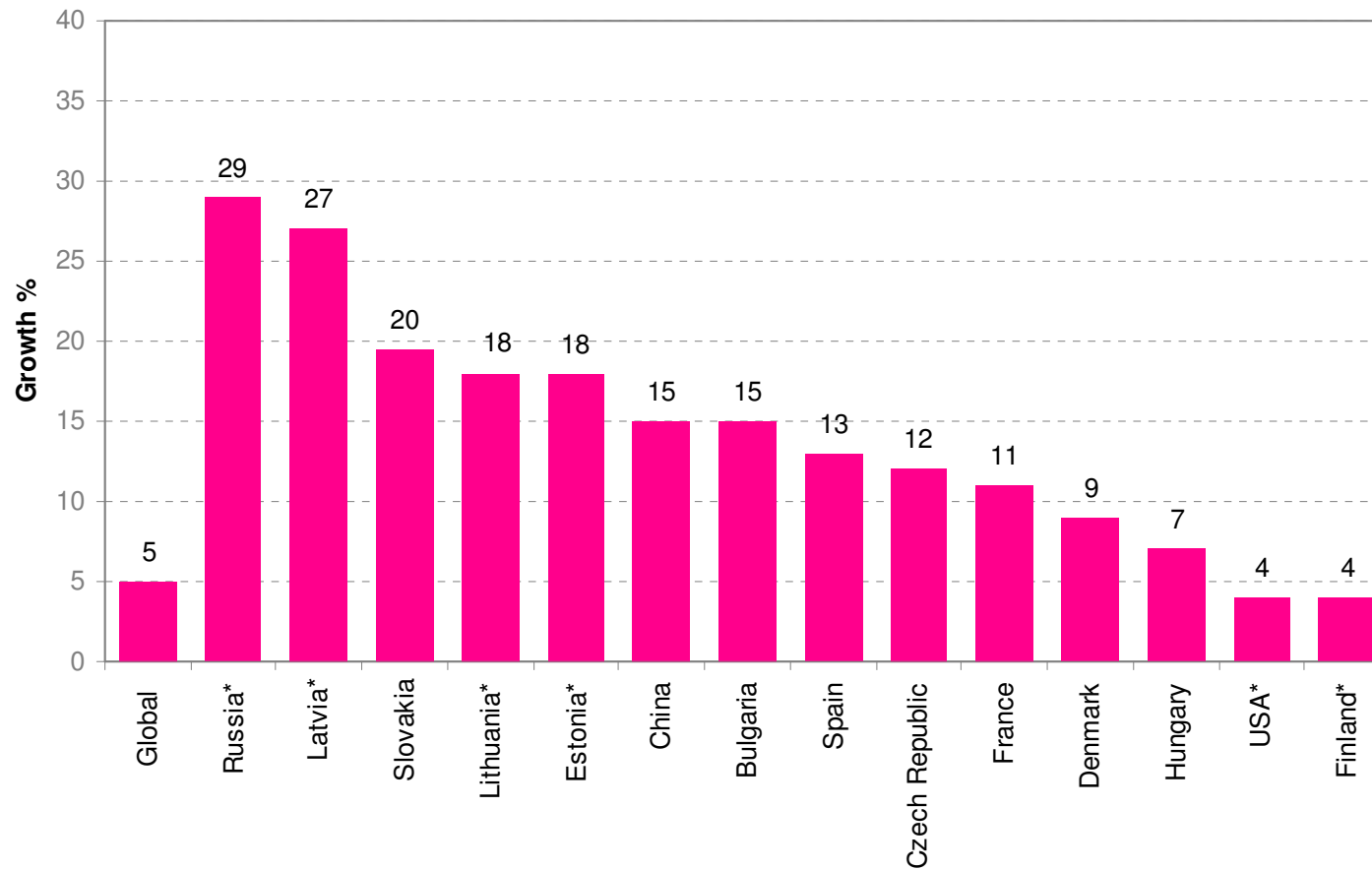
Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

Advertising Expenditure 2000-2006



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

Changes in Selected Countries



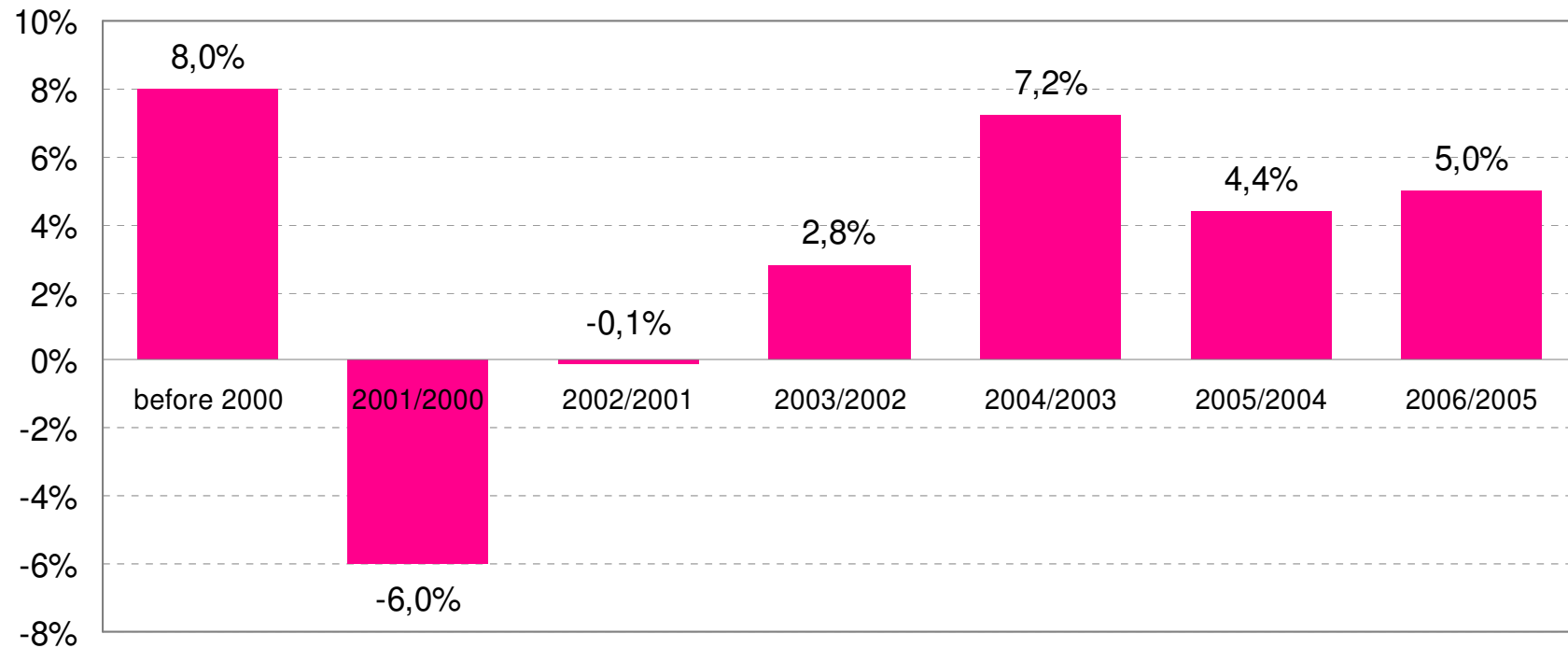
* Growth % by net expenditure



Source: TNS Media Intelligence

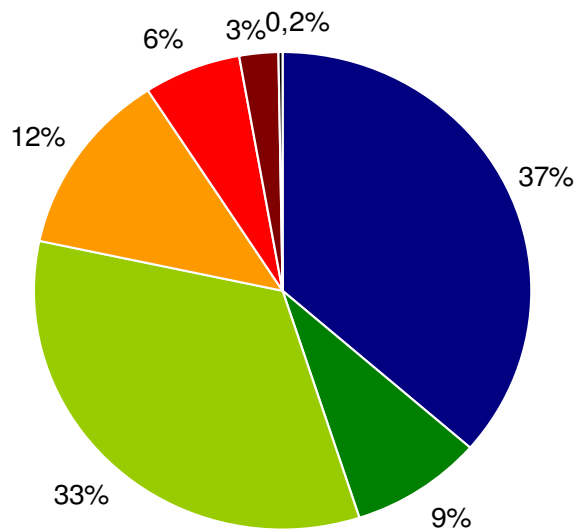
World-wide Ad expenditures trends

% change versus previous year

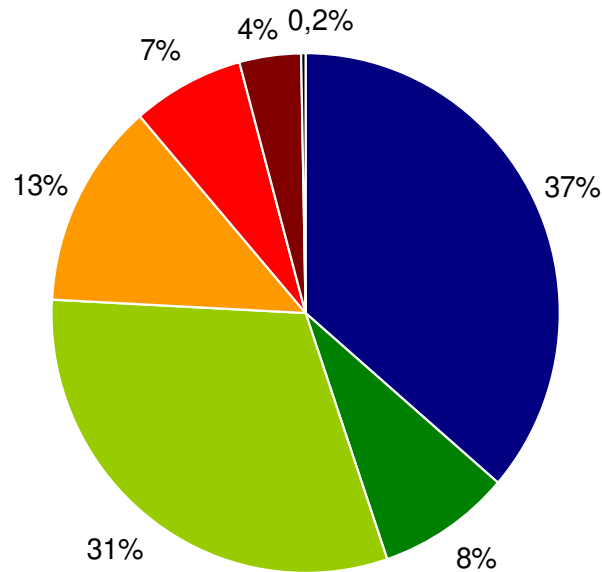


Distribution of Advertising Expenditure 2006

Baltic total 2005



Baltic total 2006



growth of media channels
2006 vs 2005

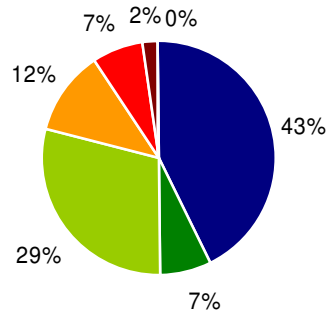
- TV – 21,2%
- Radio – 16,6%
- Newspapers – 12,6%
- Magazines – 26,5%
- Outdoor – 38,3%
- Internet – 76,3%
- Cinema – 21,5%



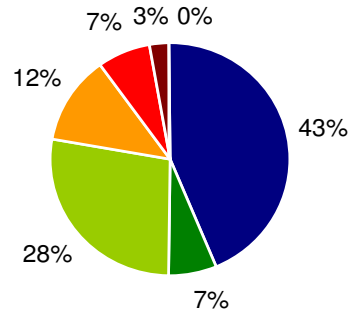
Source: TNS Media Intelligence. Estonia: TNS Emor; Latvia: TNS Latvia; Lithuania: TNS Gallup

Distribution of Advertising Expenditure 2006

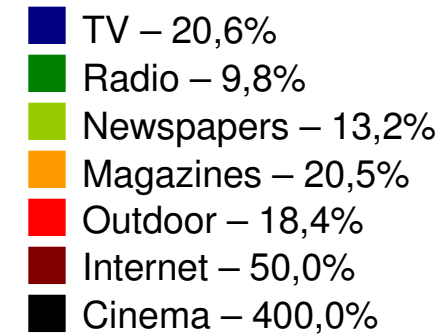
Lithuania 2005



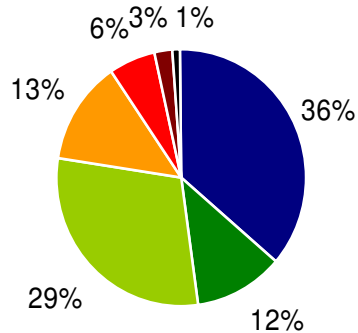
Lithuania 2006



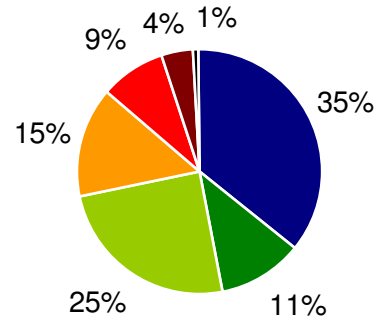
growth of media channels 2005 vs 2006



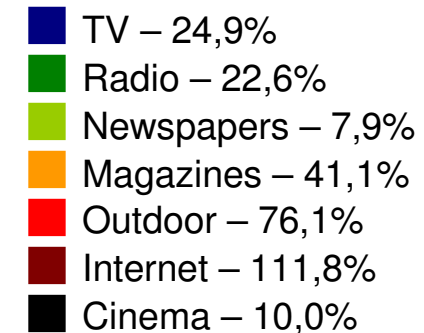
Latvia 2005



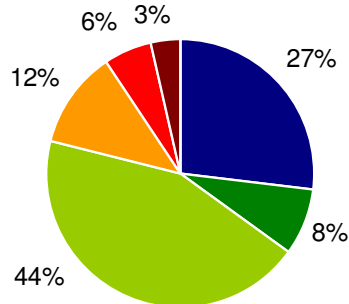
Latvia 2006



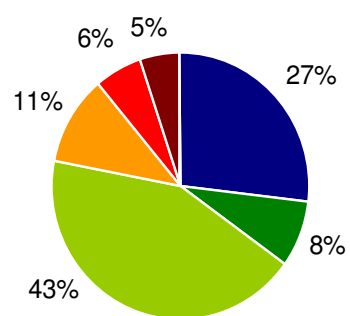
growth of media channels 2005 vs 2006



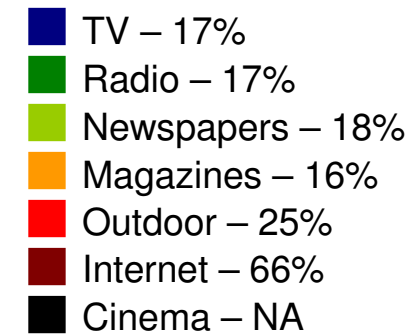
Estonia 2005



Estonia 2006



growth of media channels 2005 vs 2006



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

TOP 10 Advertisers

LITHUANIA	LATVIA	ESTONIA
PROCTER&GAMBLE	PROCTER & GAMBLE	PROCTER&GAMBLE
OMNITEL	TELE2	EMT
TELE2	LMT	TELE2 EESTI
RECKITT BENCKISER	BITE	HANSAPANK
ŠVYTURYS-UTENOS ALUS	RECKITT BENCKISER	RIMI BALTIC
BERLIN-CHEMIE	COCA-COLA HBC	COCA-COLA HBC
BITĒ	L'OREAL	A-SELVER
DANONE GROUP	COLGATE-PALMOLIVE	ELION ETTEVÕTTED
COCA-COLA	MAXIMA	L'OREAL
PALINK	UNILEVER	RECKITT-BENCKISER

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

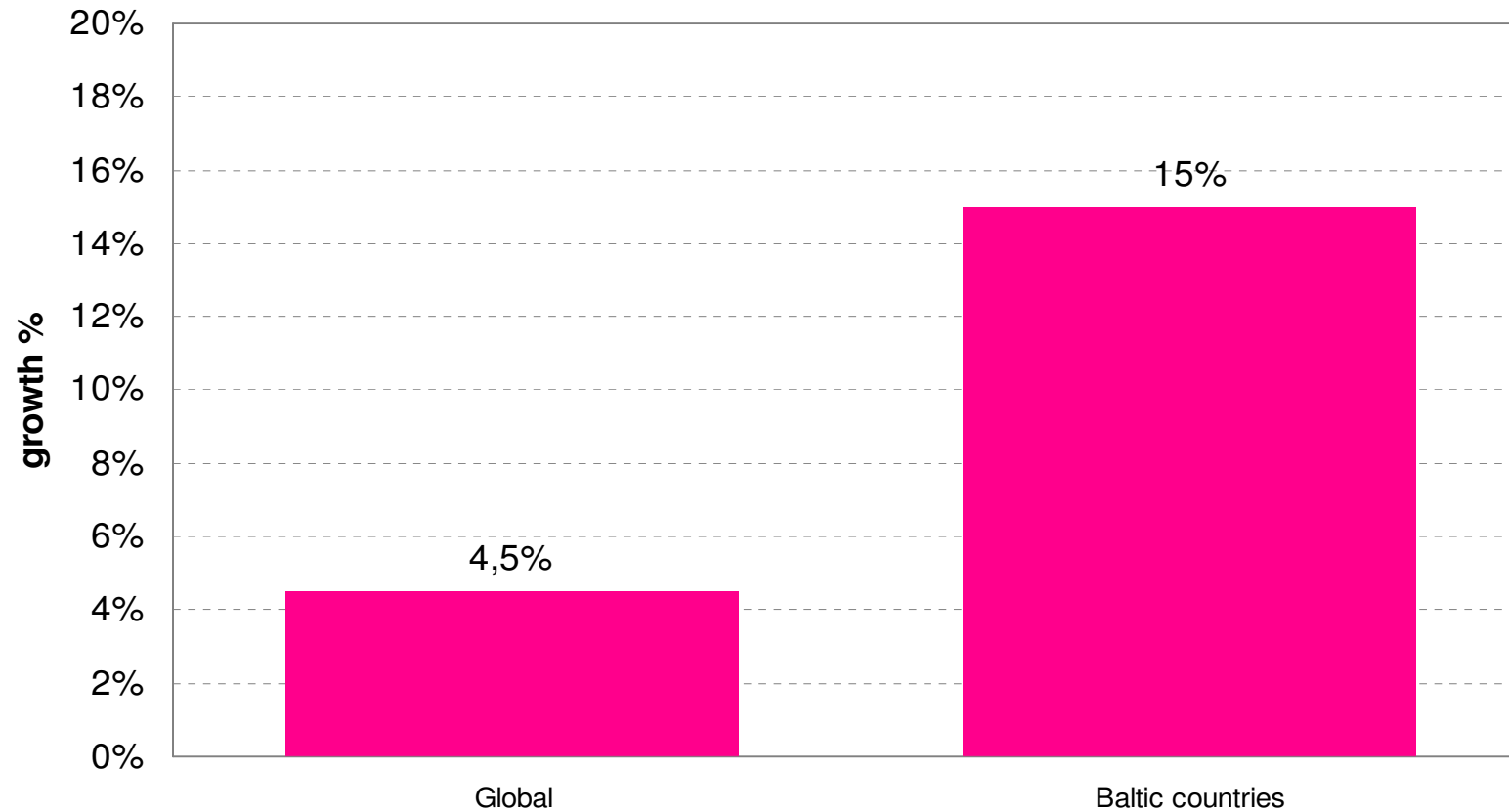
LITHUANIA	LATVIA	ESTONIA
MOBILE COMMUNICATION	MOBILE COMMUNICATION	MOBILE COMMUNICATION
REMEDIES	FINANCIAL INSTITUTIONS, SERVICES	CARS
HOUSEHOLD HYGIENE	HOUSEHOLD HYGIENE	RETAIL
ALCOHOLIC BEVERAGES	CARS	JOB OFFERS
RETAIL IN GENERAL	RETAIL IN GENERAL	CONCERTS, FESTIVALS, SHOWS
HAIR CARE	CONCERTS, FESTIVALS, SHOWS	FINANCIAL INSTITUTIONS, SERVICES
COLD DRINKS	REMEDIES	REMEDIES
SWEETS, CONFECTIONERY	HAIR CARE	ALCOHOLIC BEVERAGES
HOME APPLIANCES	COLD DRINKS	REAL ESTATE
TELECOMMUNICATION	JOB OFFERS	FURNITURE

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Ad expenditures forecast for 2007



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

Contact us!

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