



Baltic Media Advertising Market 2017

Kantar Baltic

Advertising Expenditure 2017

Baltic summary

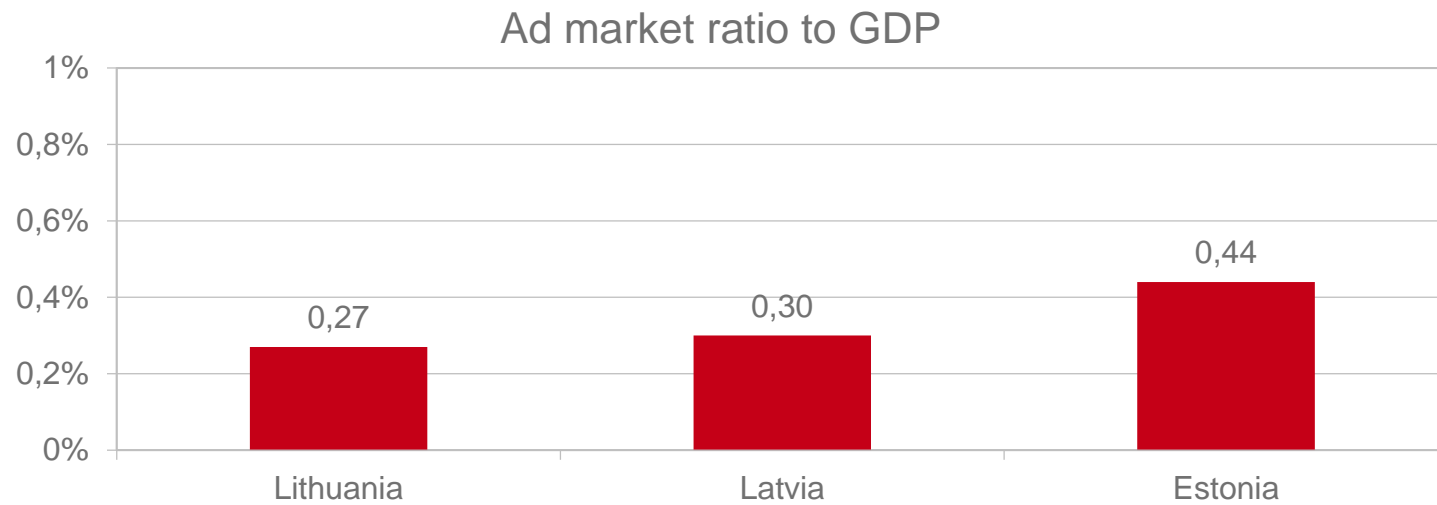
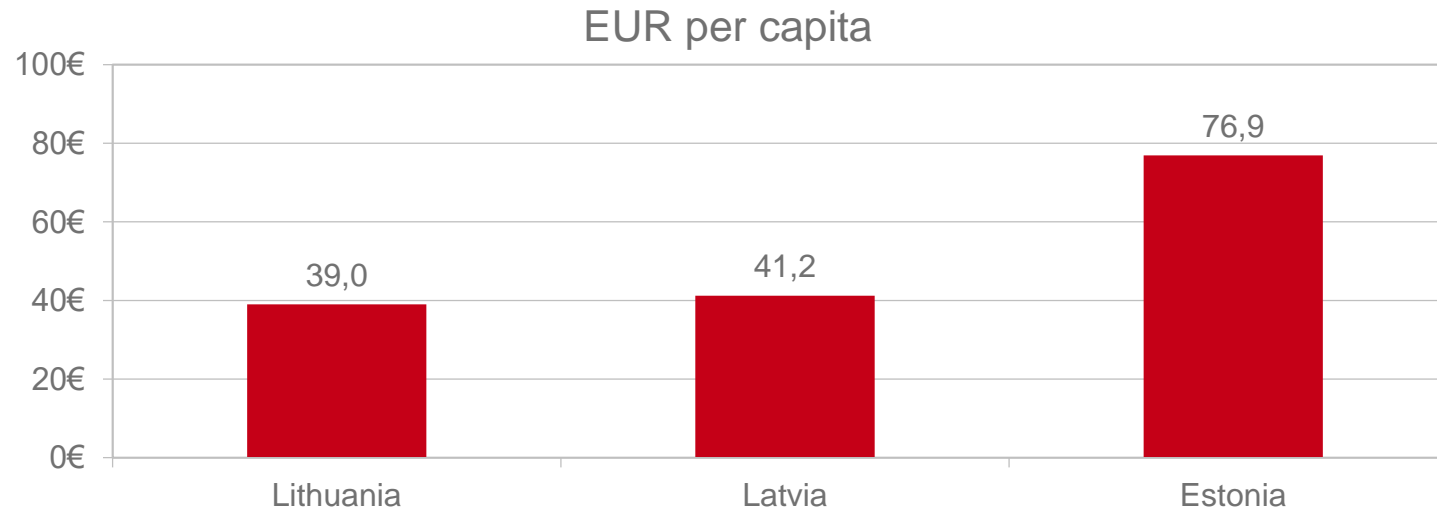
- Baltic countries Total 292,8 million EUR
- Change vs 2016 3,5% *

	LITHUANIA	LATVIA	ESTONIA
TOTAL (million EUR)	111,2 million EUR	80,4 million EUR	101,2 million EUR
Change %	3,8%	3,6%	3,0%*

* in Estonia 2017 there are methodology changes in Outdoor data. Total Growth % in same calculation as 2016 would be 3,0 % in Estonia and 3,5% Baltic total

Source: Kantar Media
 Estonia: Kantar Emor
 Latvia: Kantar TNS
 Lithuania: Kantar TNS

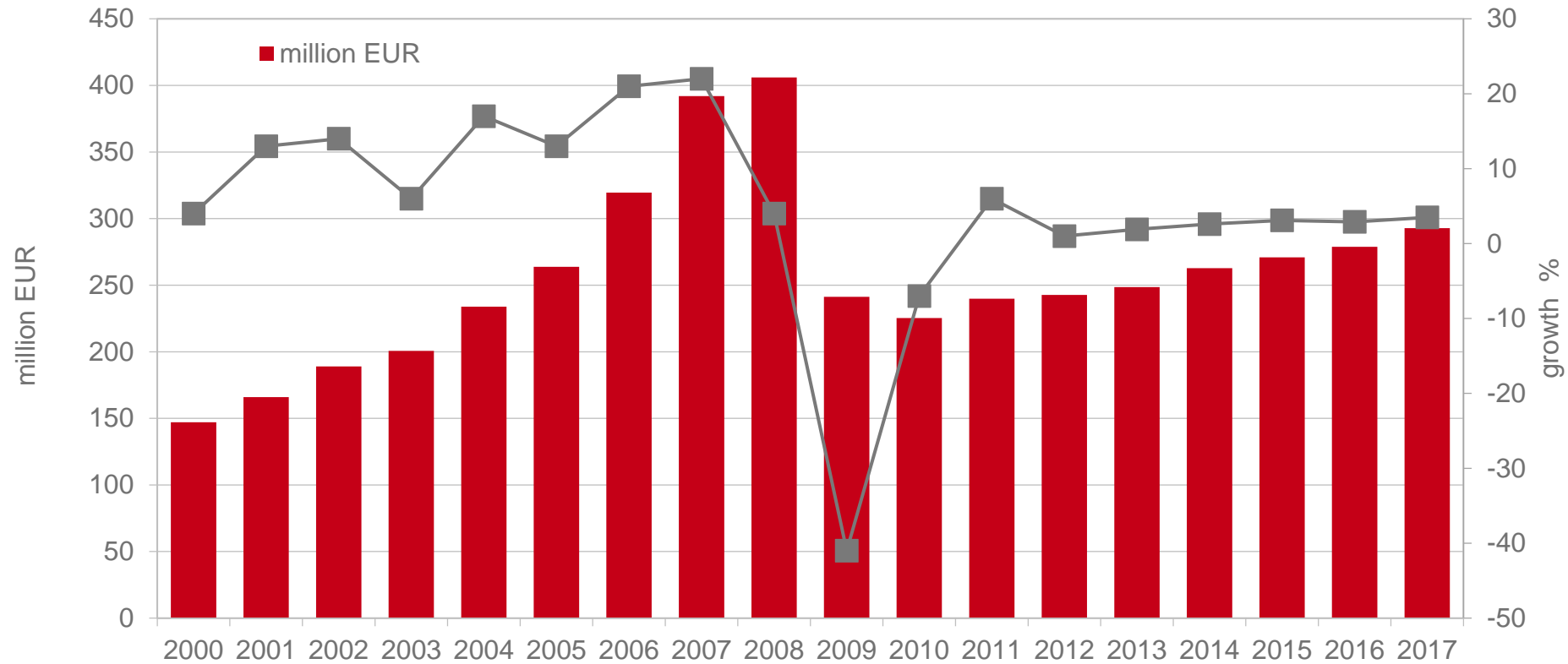
Advertising Expenditure 2017



Source: Kantar Media
Estonia: Kantar Emor
Latvia: Kantar TNS
Lithuania: Kantar TNS

Advertising Expenditure 2000-2017

Baltic Trend



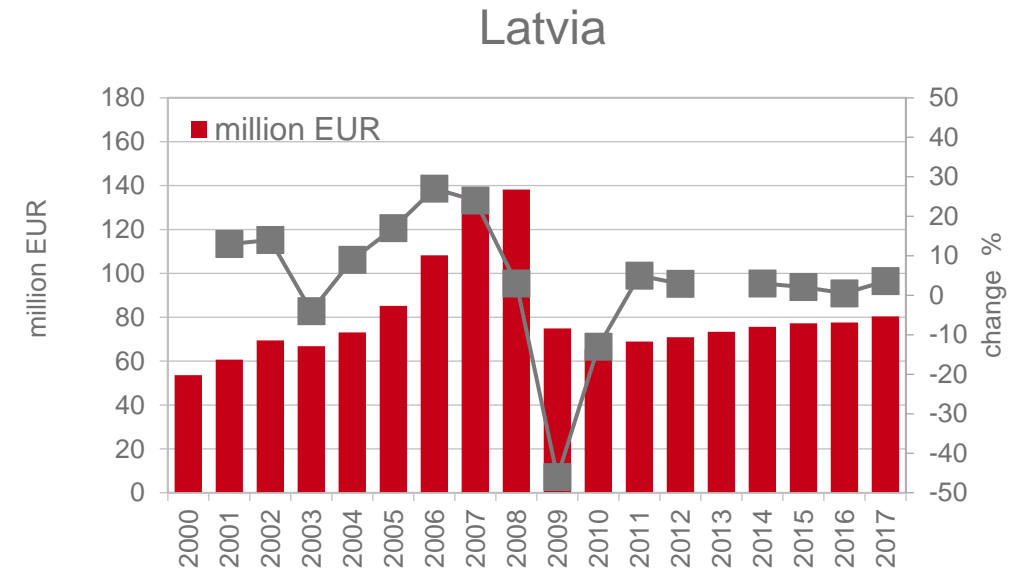
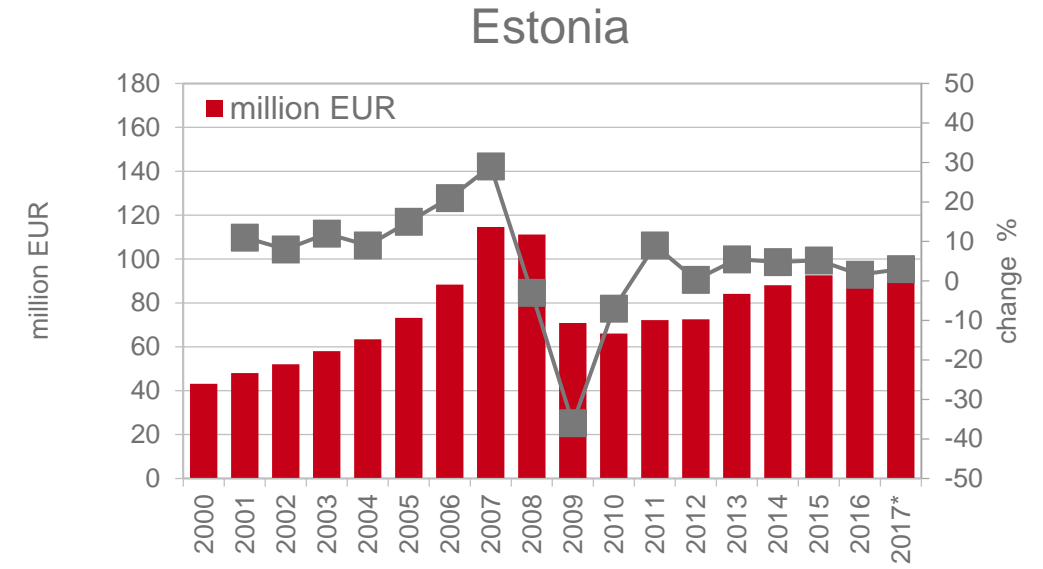
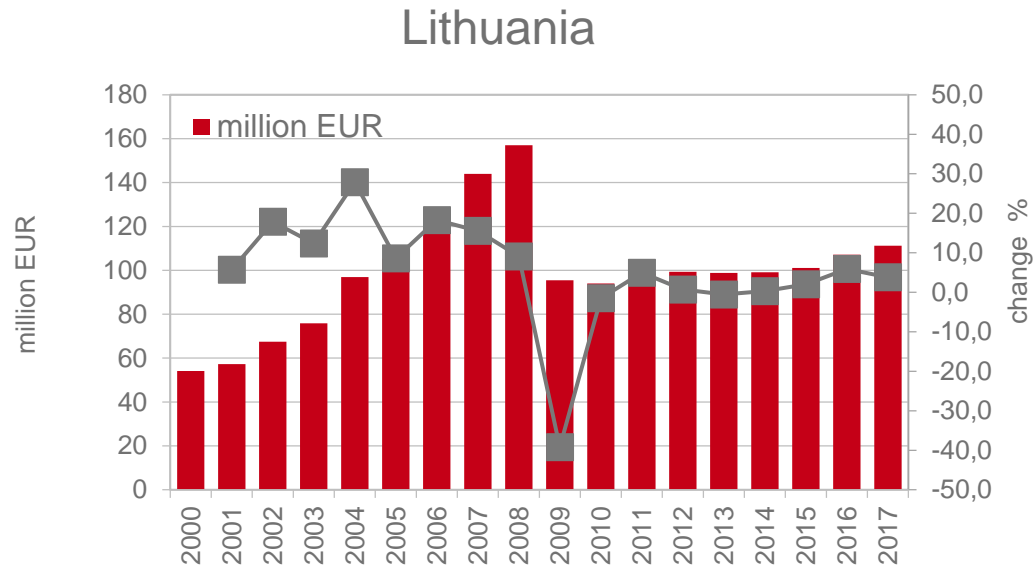
*2012 vs 2013 Baltic change %-s has been calculated based on Estonian and Lithuanian figures

* in Estonia 2017 there are methodology changes in Outdoor data. Total Growth % in same calculation as 2016 would be 3,5 % in Baltic total figures

Source: Kantar Media
 Estonia: Kantar Emor
 Latvia: Kantar TNS
 Lithuania: Kantar TNS

Advertising Expenditure 2017

Trends per country

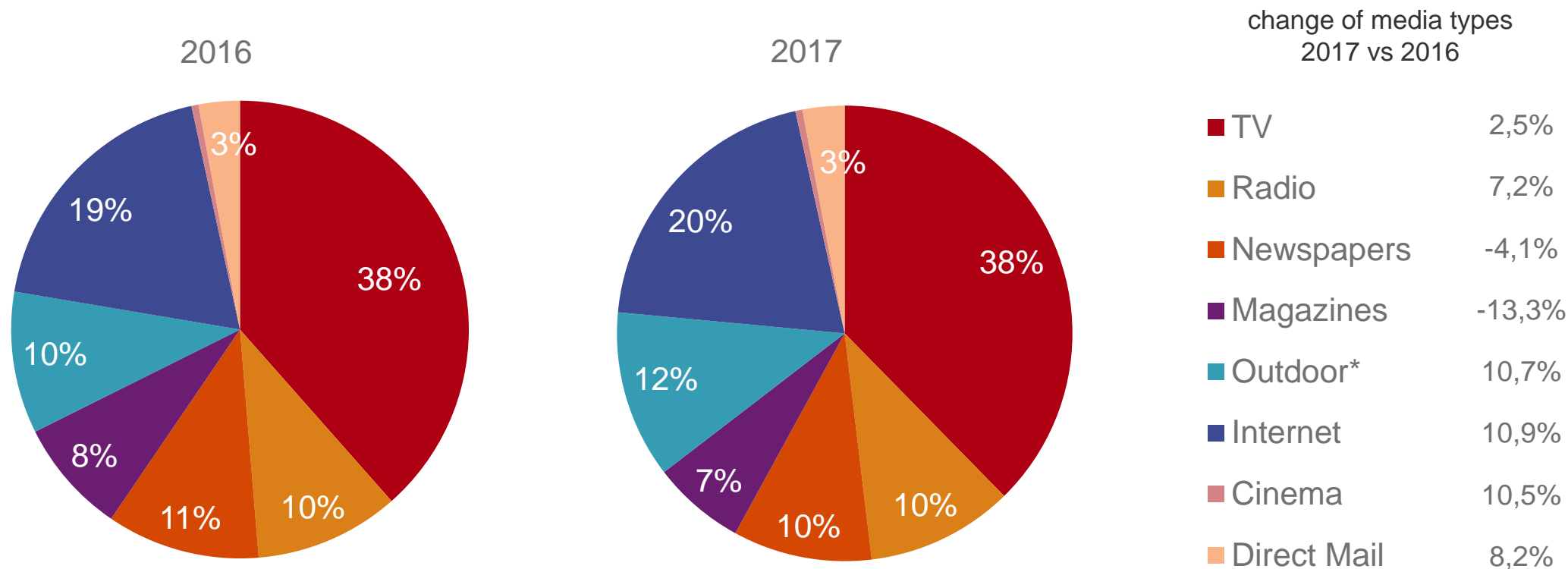


Source: Kantar Media
 Estonia: Kantar Emor
 Latvia: Kantar TNS
 Lithuania: Kantar TNS

* in Estonia 2017 there are methodology changes in Outdoor data. Total Growth % in same calculation as 2016 would be 3,0 % in Estonia

Distribution of Advertising Expenditure 2017

Baltic shares



Share of Cinema was 2016 - 0,5% and 2017 – 0,5%

Source: Kantar Media
 Estonia: Kantar Emor
 Latvia: Kantar TNS
 Lithuania: Kantar TNS

* in Estonia 2017 there are methodology changes in Outdoor data. Total Growth % in same calculation as 2016 would be 10,7 % in Baltic total

Distribution of Advertising Expenditure 2017

Baltic shares

Share of Cinema:

Lithuania - 0,9% in 2016 and 1,0% in 2017

Latvia – 0,4% in 2016 and 0,5% in 2017

*Change in Outdoor Media:

Estonia - in 2017 there are methodology changes in Outdoor data. As the 2016 benchmark is adjusted for the calculation of the change the Total Growth % would be 3,4 %

Note: Lithuanian Outdoor data includes Indoor TV .

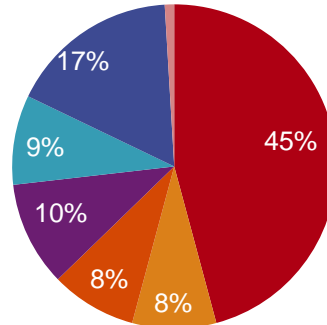
Source: Kantar Media

Estonia: Kantar Emor

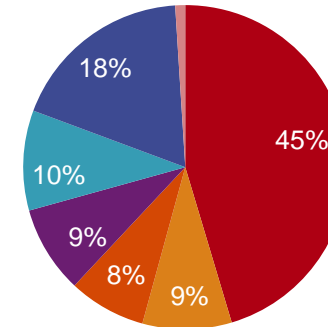
Latvia: Kantar TNS

Lithuania: Kantar TNS

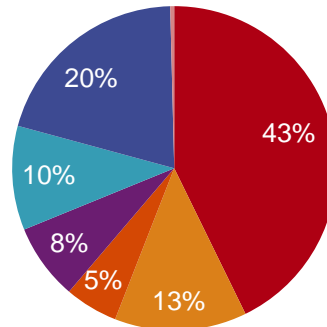
Lithuania 2016



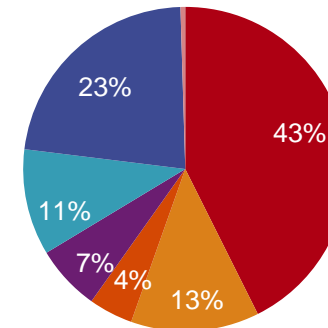
Lithuania 2017



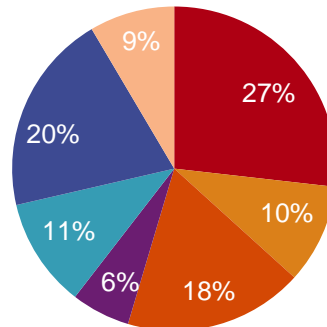
Latvia 2016



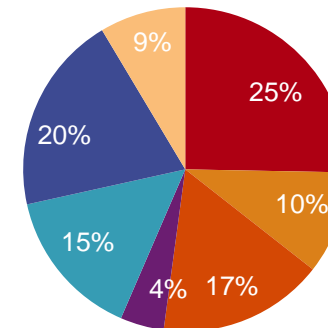
Latvia 2017



Estonia 2016



Estonia 2017



change of media types

2017 vs 2016

TV	2,7%
Radio	10,1%
Newspapers	-6,6%
Magazines	-13,5%
Outdoor	15,8%
Internet	12,2%
Cinema	10,0%

TV	3,1%
Radio	0,7%
Newspapers	-13,2%
Magazines	-10,6%
Outdoor	5,5%
Internet	14,6%
Cinema	11,8%

TV	1,5%
Radio	11,6%
Newspapers	-0,5%
Magazines	-15,8%
Outdoor*	3,4%
Internet	6,4%
Cinema	NA
Direct Mail	8,2%

Media Intelligence in the Baltics

What we offer?

Advertising monitoring

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

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 for more information!

ESTONIA

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