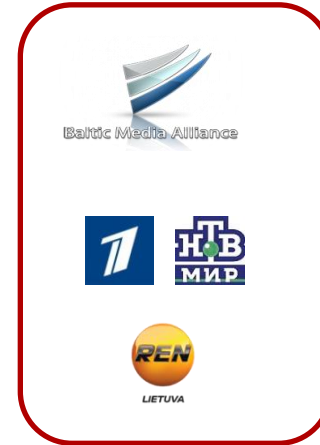
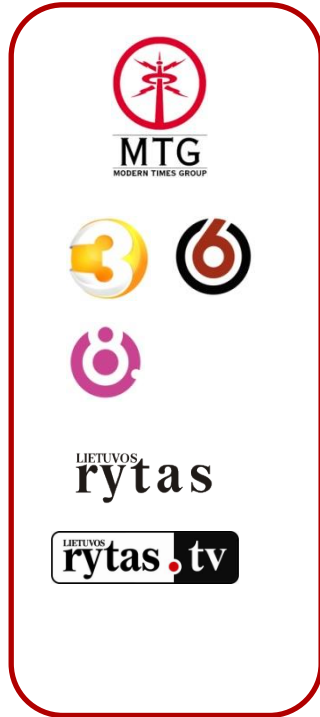


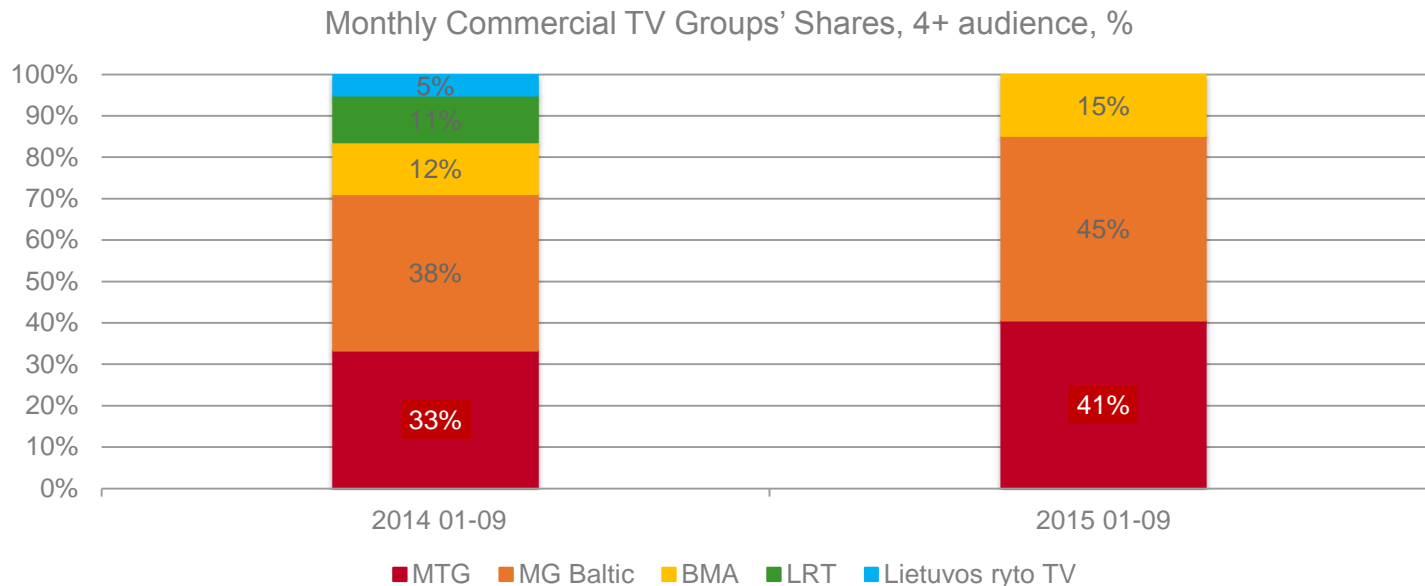
MAIN COMMERCIAL TV GROUPS IN 2015

LITHUANIA

COMMERCIAL TV GROUPS 2015



COMMERCIAL TV GROUPS: AUDIENCE SHARES



MG Baltic group remained “number one” in Y15. MTG group took over Lietuvos Rytas TV commercial advertising sales and acquired Lietuvos Rytas commercial TV share. National broadcaster LRT and Russian language TV channel RTR started Y15 with no commercial advertising therefore they are not being counted into commercial TV shares anymore.

MTG group: TV3, TV6, TV8, Lietuvos Rytas TV

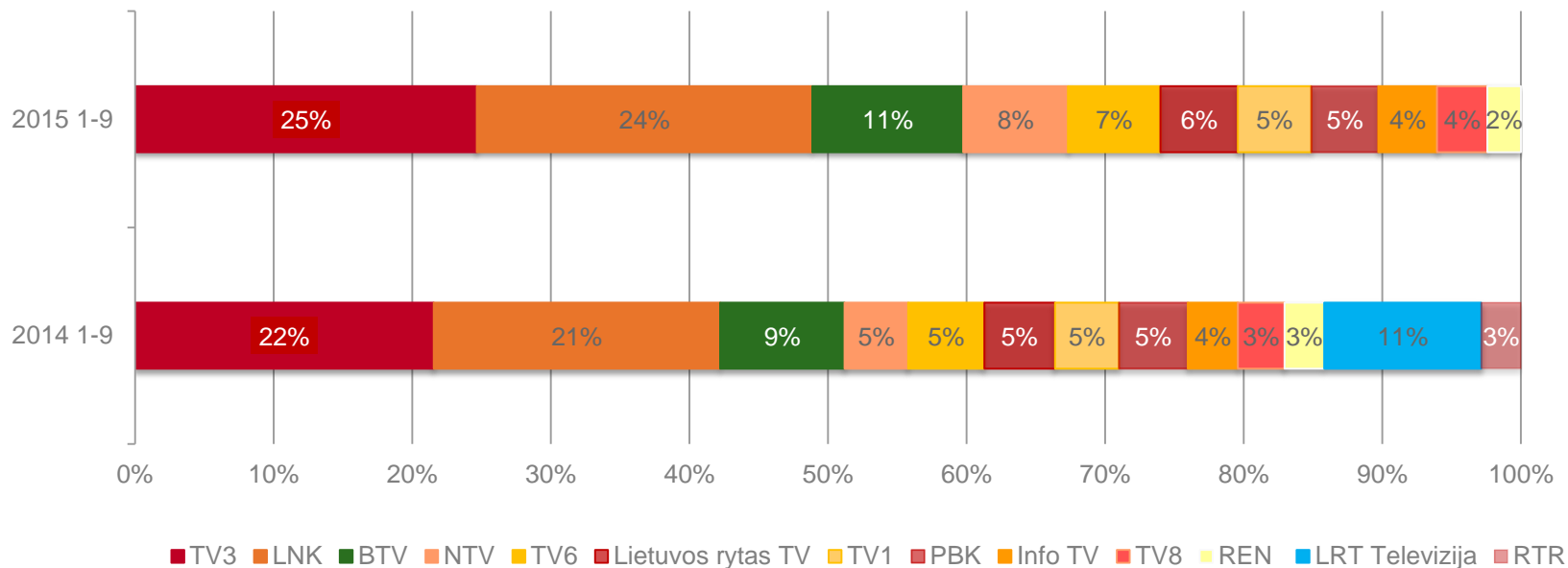
MG Baltic group: LNK, BTV, TV1, Info TV

BMA group: PBK, NTV, REN

Source: TNS 2014 1-9 – 2015 1-9

COMMERCIAL TV CHANNELS: AUDIENCE SHARES

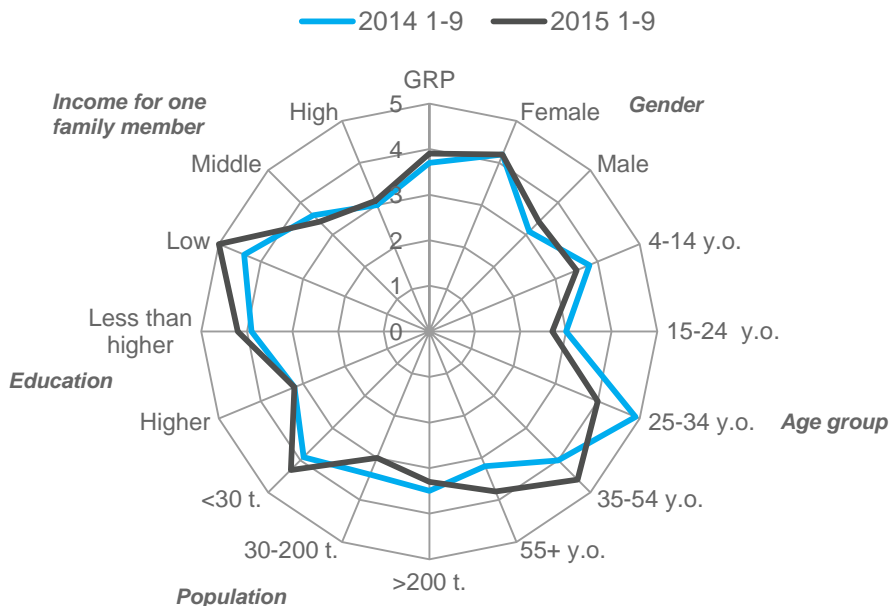
Monthly Commercial TV Channels' Shares, 4+ audience, %



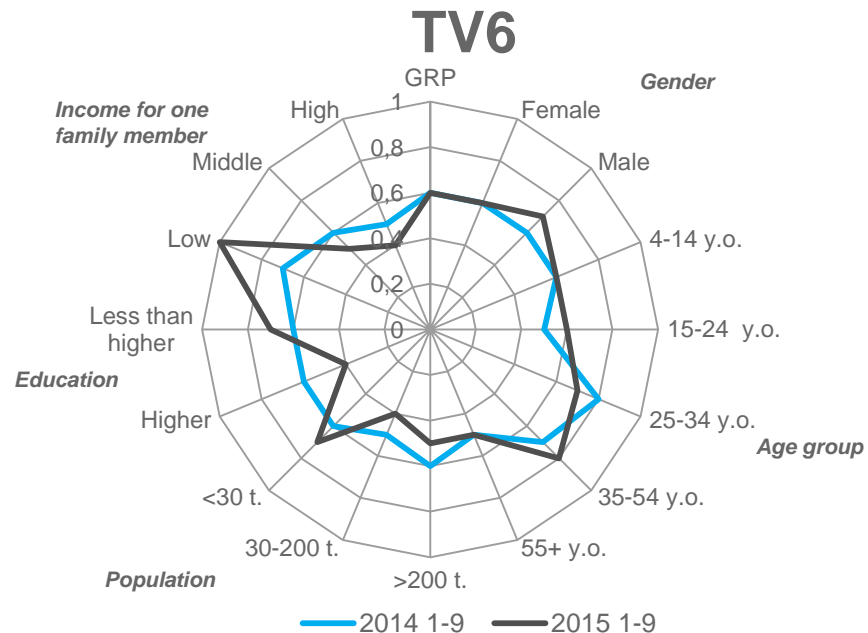
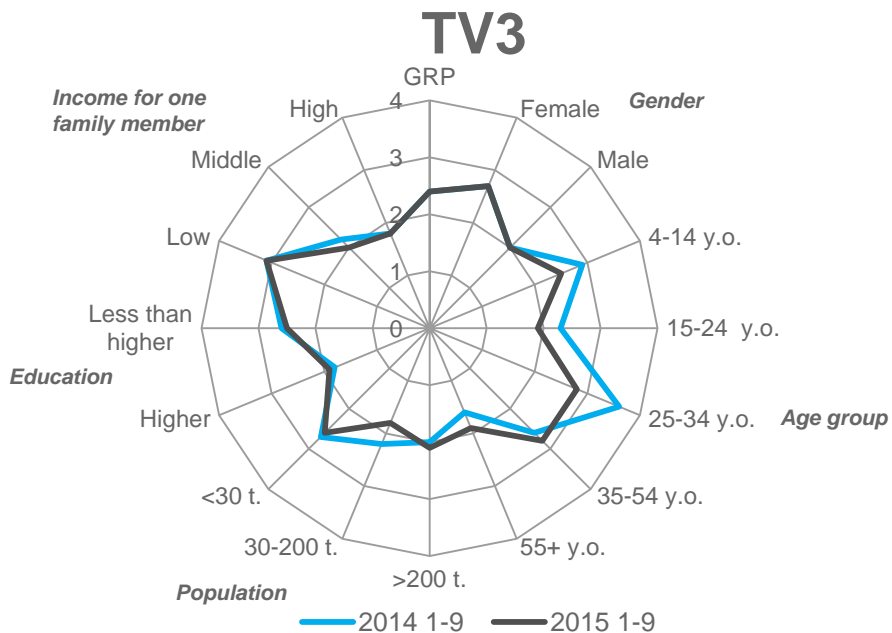
The biggest TV channels TV3 & LNK strongly competes – TV3 do not want to lose leader position in terms of shares.

MTG (TV3, TV6, TV8, LIETUVOS RYTO TV)

- **MTG** is one of the major commercial TV channel groups in Lithuania. Recent TV channel analysis show that **MTG group** can not recover leader position. In 2015 **Lietuvos ryto TV** channel become a part of **MTG group**. TV channel **RTR** started 2015 with no commercial advertising.
- **MTG Share** has increased by 8 percentage points till **41%** in period 2015 1-9 comparing with the same last year period.
- **Differences 2015 1-9 vs. 2014 1-9:** this year MTG audience increased a bit. Growth visible in age groups 35-54 y.o. & 55 + y.o audiences. Also sharp increase is in Low income audience. Strongest decrease visible in 25-34 y.o. and in medium-sized towns audiences.
- **MTG Main Target Group (Y15):** 25-55+ years old Female with low income, living in small towns, with less than higher education.



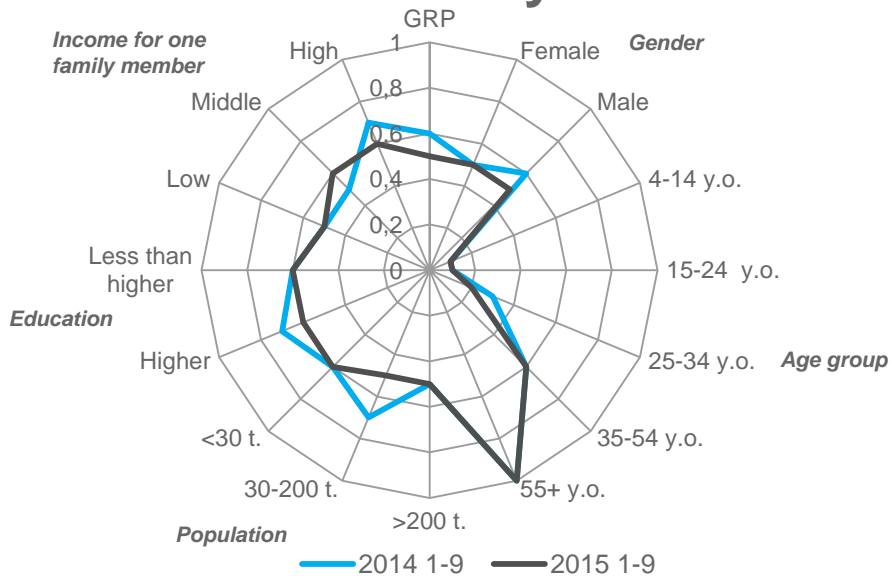
MTG – TV3, TV6



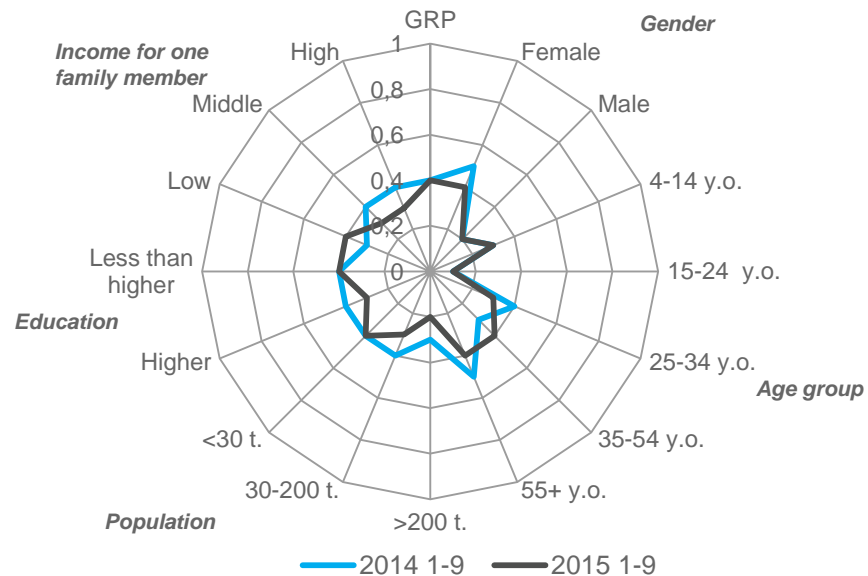
The audience size of the main MTG group channels is stable. TV3 mostly lost age group 25-34 y.o. audience, TV6 – audience with Higher education. TV6 shows sharp increase in Low income audience.

MTG – LIETUVOS RYTO TV, TV8

Lietuvos ryto TV



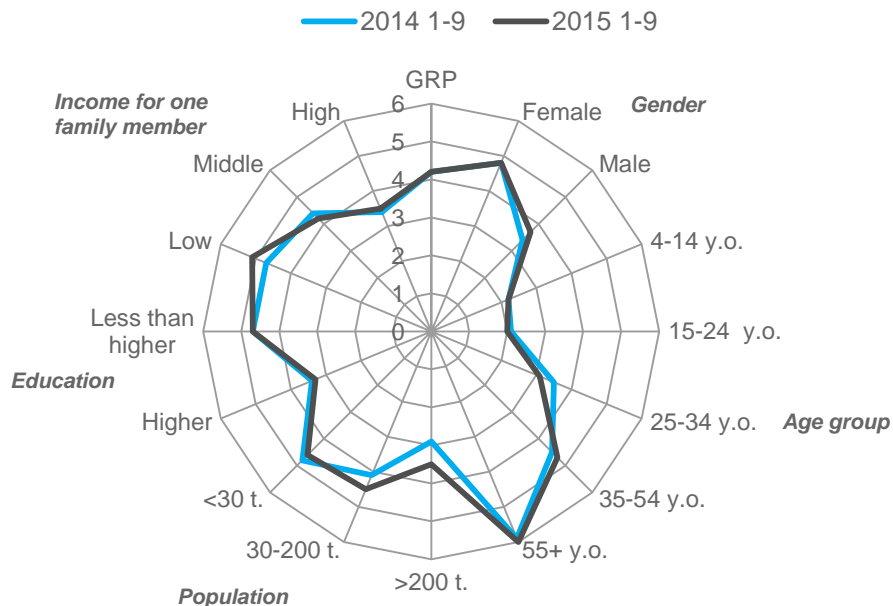
TV8



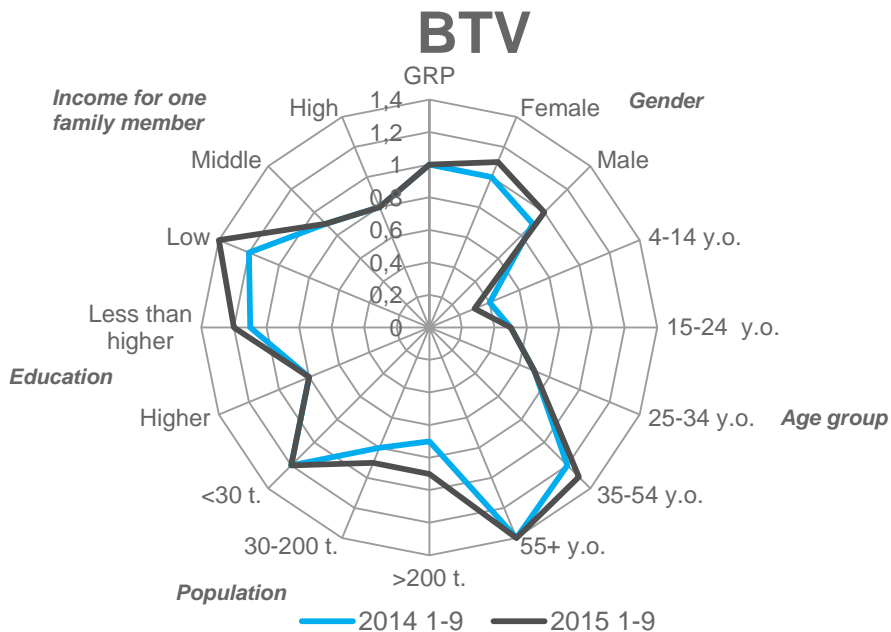
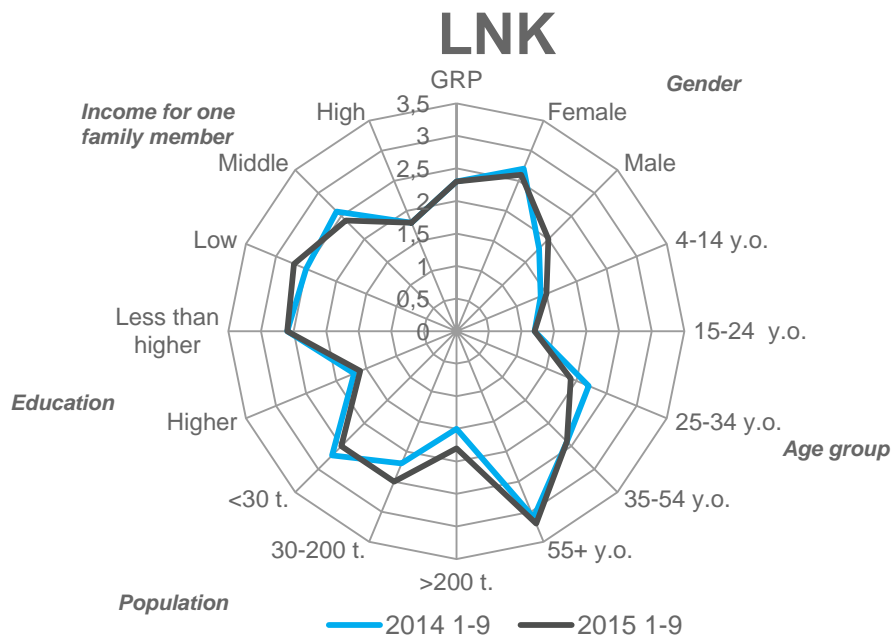
The audience of the new MTG group channel Lietuvos ryto TV is decreasing. However TV8 audience size remain the same – visible changes only in demographical split.

MG BALTIC (LNK, BTV, TV1, INFO)

- **MG Baltic** is one of the strongest commercial TV channel groups in Lithuania. This year **MG Baltic group** has the biggest audience share among commercial TV channel groups in Lithuania.
- **MG Baltic Share** has increased by 7 percentage points till **45%** in period 2015 1-9 comparing with the same last year period.
- **Differences 2015 1-9 vs. 2014 1-9:** MG Baltic group audience size is stable, visible only non significant changes in demographical split. The biggest growth is in Low income and Big cities audiences. Large drop visible in age group 25-34 y.o.
- **MG Baltic Main Target Group (Y15):** 35-55+ years old Female with low and middle income living in small and medium-sized towns with less than higher education.

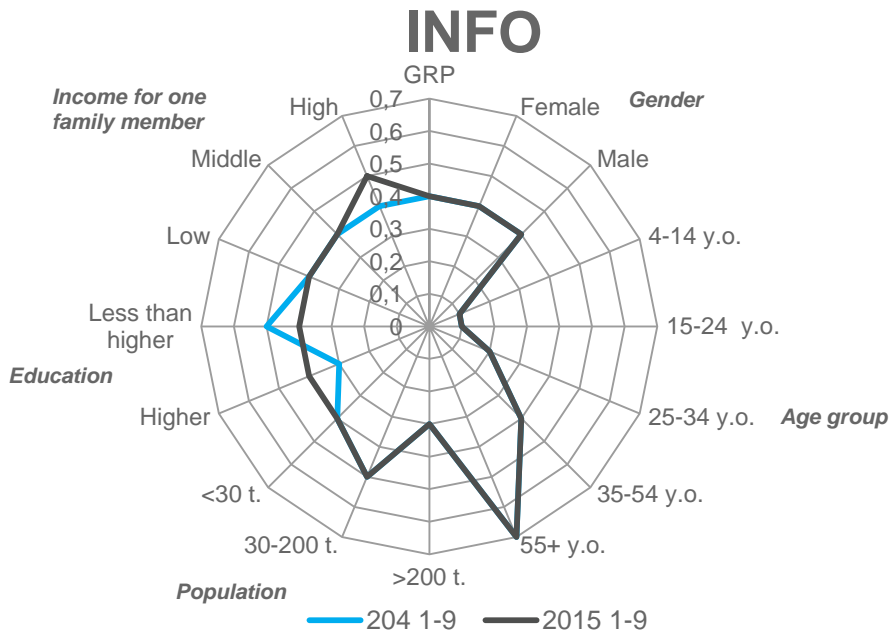
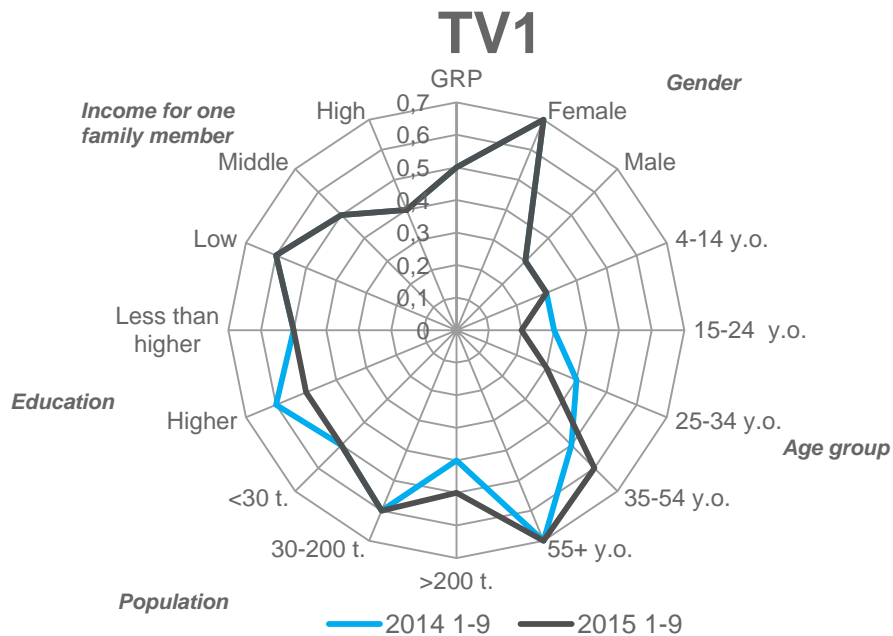


MG BALTIC – LNK, BTV



The audience of the main MG Baltic group channel remain the same – but LNK got more audience in big and medium-sized towns. BTV audience become more with Low income and more concentrated in big towns.

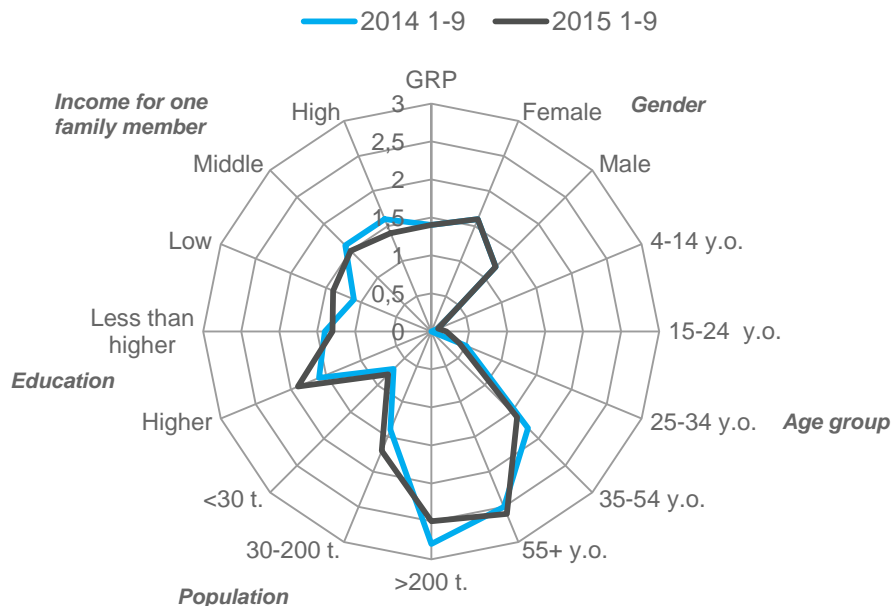
MG BALTIC – TV1, INFO



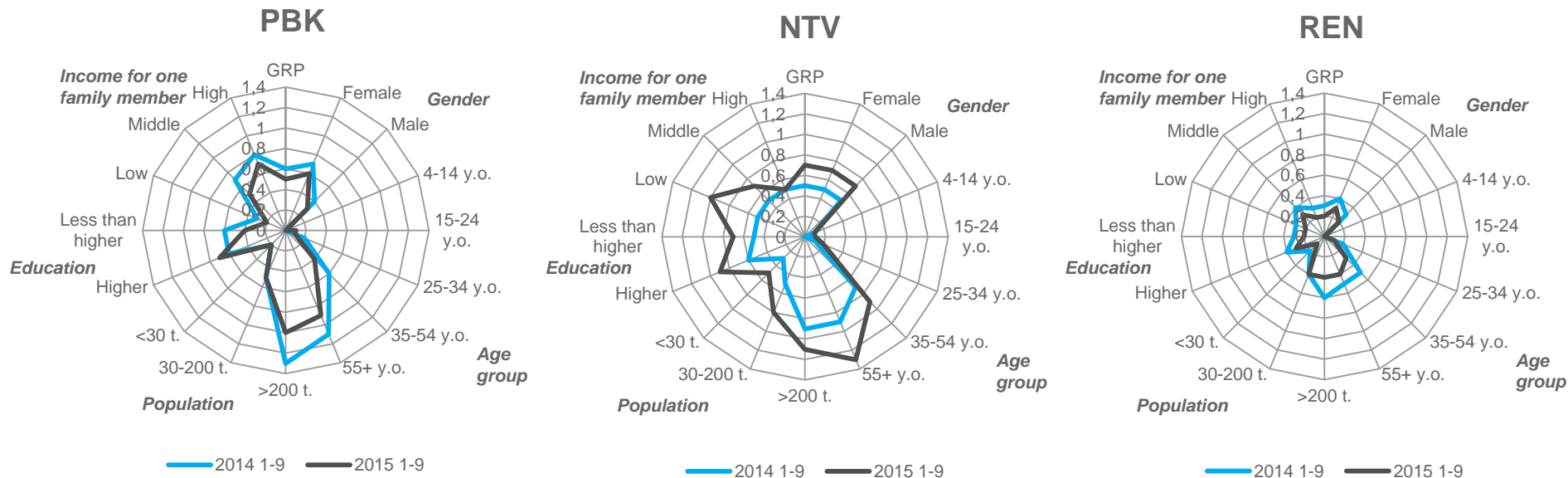
The audience of the small MG Baltic group channels is stable. TV1 audience become older and more concentrated in big towns. INFO audience – differently than other TV channels audience become more with High income and Higher education.

BMA (PBK, NTV, REN)

- **BMA** is Russian commercial TV channels group in Lithuania.
- **BMA group share** has increased by 3 percentage points till **15%** in period 2015 1-9 comparing with the same last year period.
- **Differences 2015 1-9 vs. 2014 1-9:** BMA group audience size remain the same. The audience become more with Low income and Higher education.
- **BMA Main Target Group (Y15):** 55+ years old Female and Male with low and middle income, living in big towns with higher education.

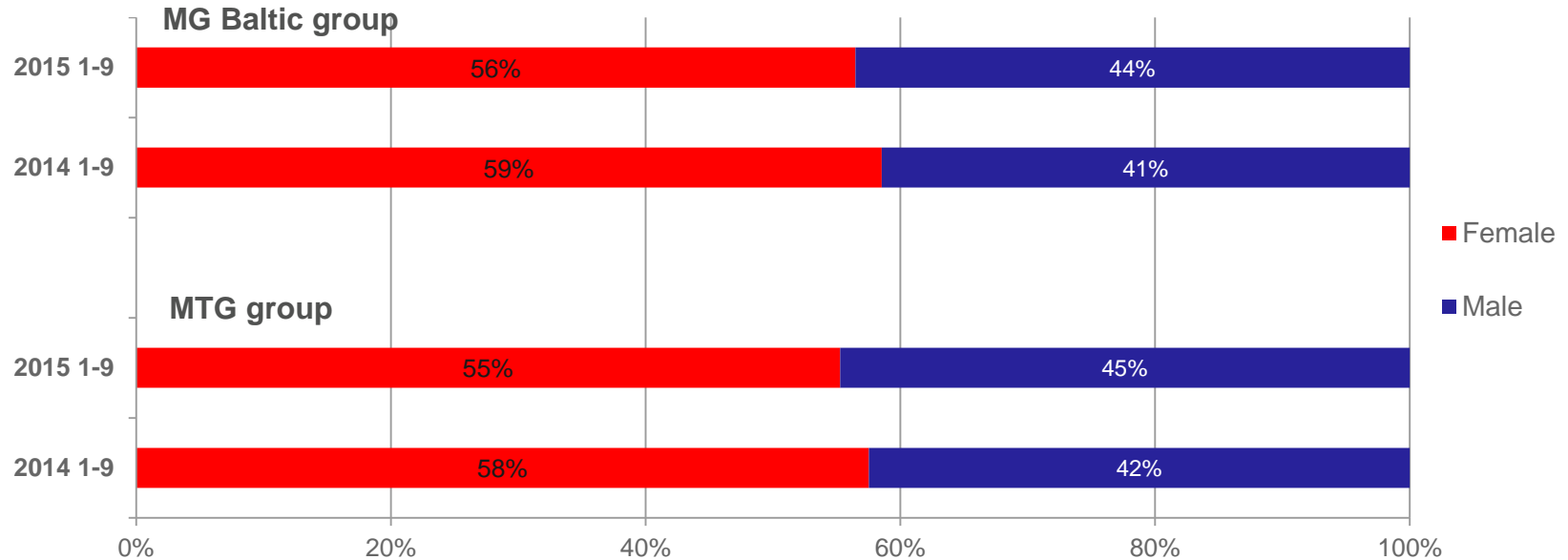


BMA – PBK, NTV, REN



The audience size of the Russian channel PBK decreased a bit, but no significant changes in demographical audience split. However NTV audience increased - NTV mostly got older, with Low income and living in medium-sized towns audience. REN as PBK audience slightly decreased with no significant changes in demographical audience split.

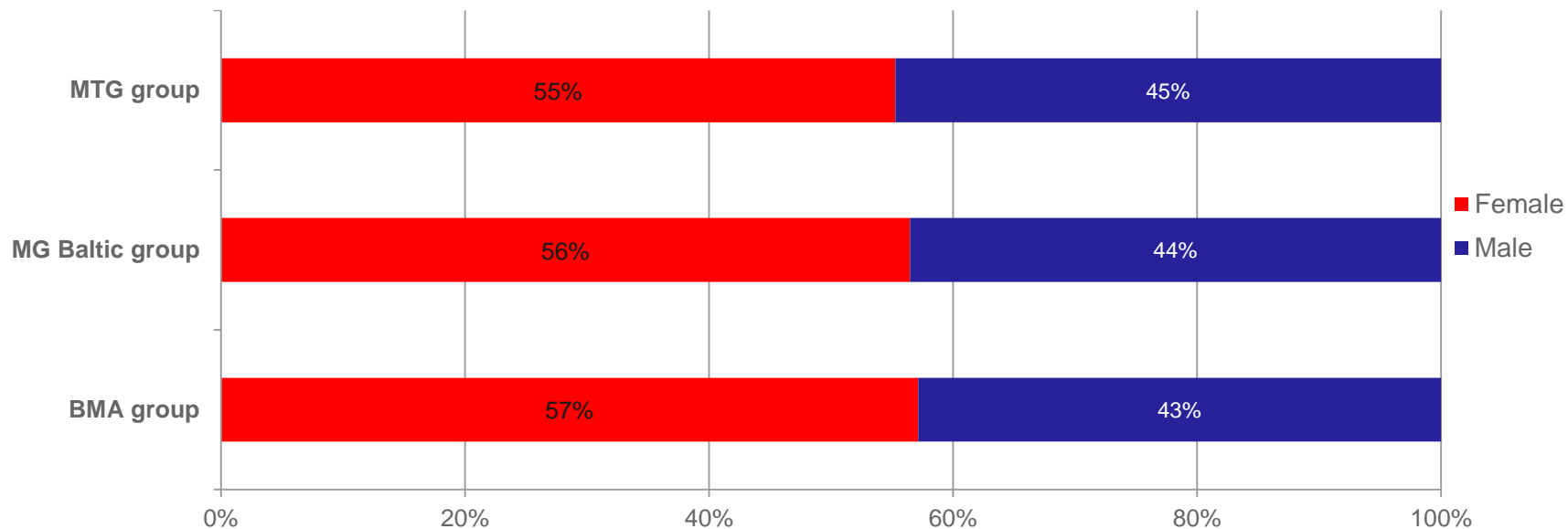
TV CHANNELS AUDIENCE STRUCTURE BY GENDER



No major changes in recent year: MTG and MG group audience structure by gender changed non significant – both groups audiences have a bit more male this year comparing with the same period of last year.

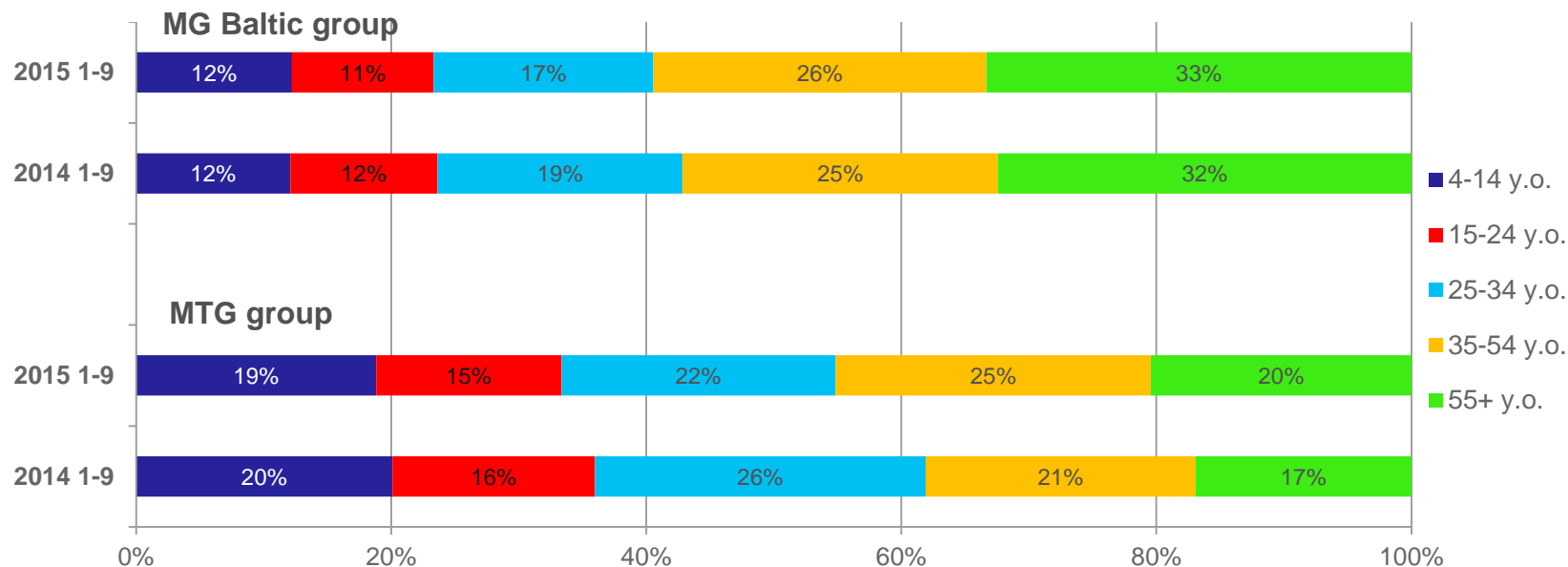
If comparing both groups – dominant gender is Female.

TV CHANNELS AUDIENCE STRUCTURE BY GENDER



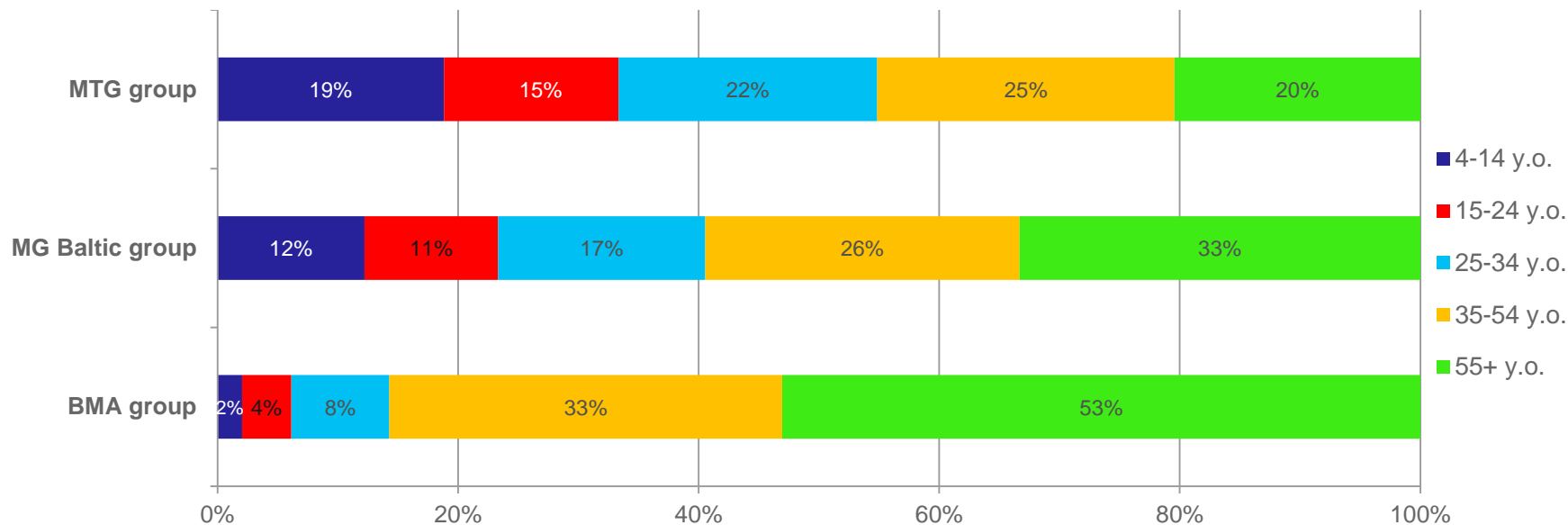
Dominant gender among TV channels is Female. The biggest Female share has BMA group. The biggest Male share has MTG group.

TV CHANNELS AUDIENCE STRUCTURE BY AGE



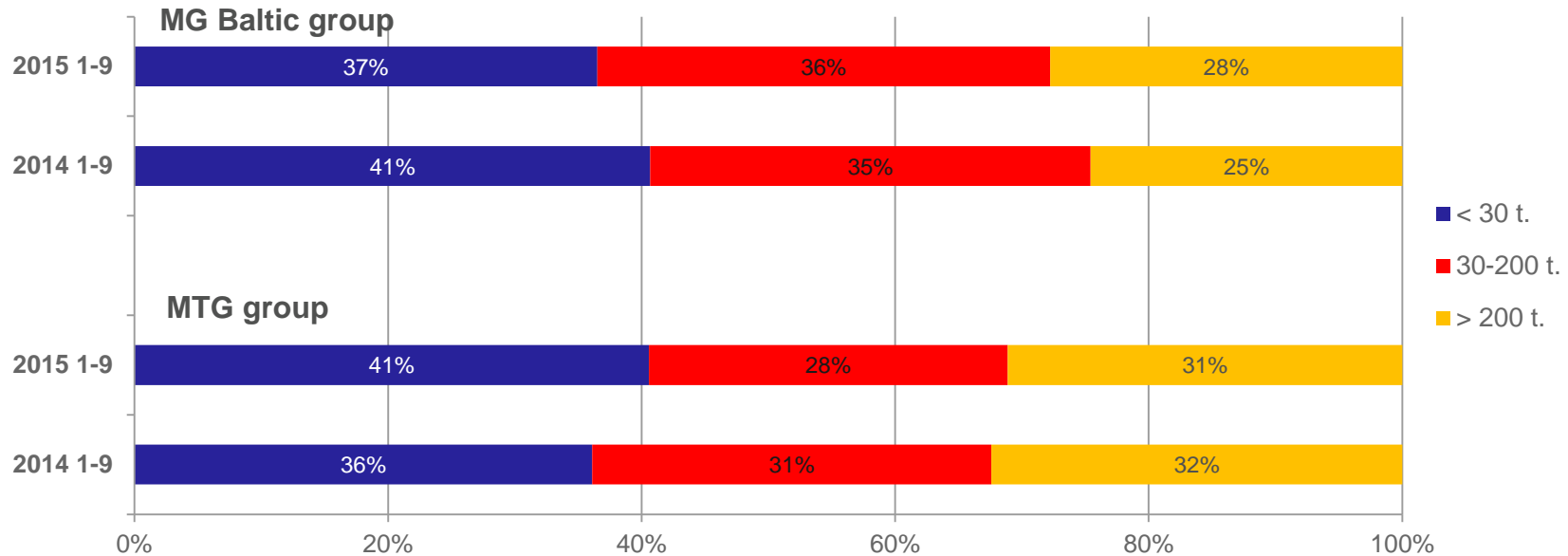
The biggest change visible in age group 25-34 y. o. – decreased in both TV channel groups. Both TV channel groups audiences became older this year.

TV CHANNELS AUDIENCE STRUCTURE BY AGE



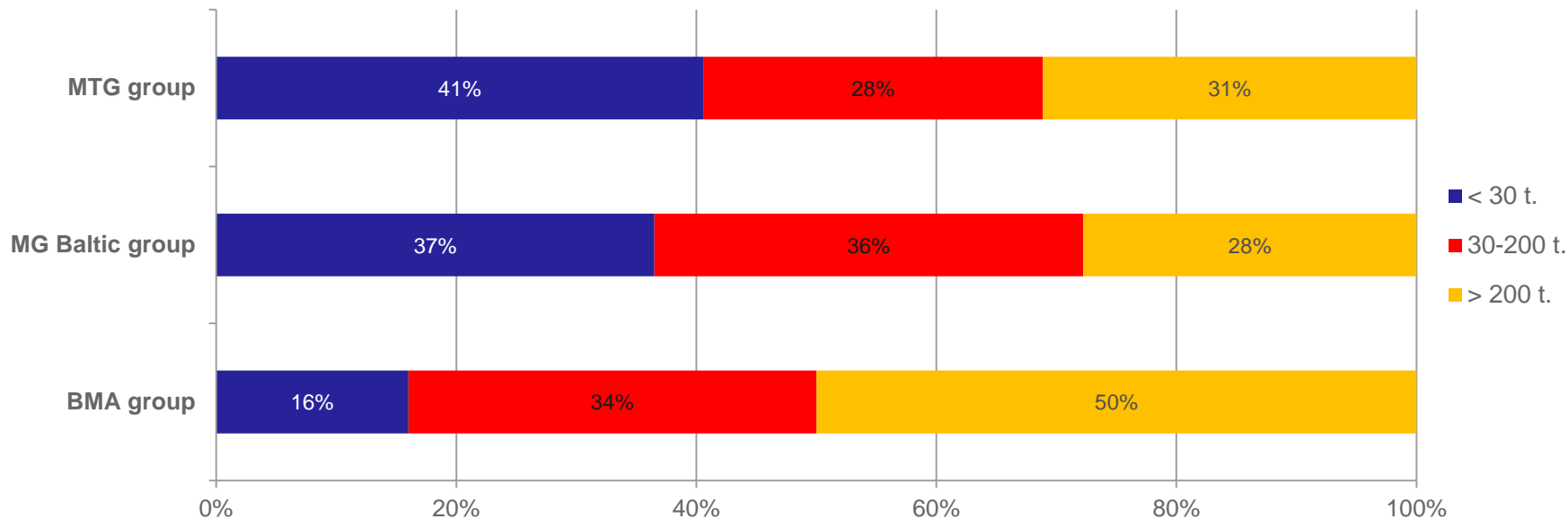
MTG and MG Baltic groups audience is more young. Meanwhile BMA group has older audience. BMA group practically has no very young audience – more than half of audience is 55+ years old.

TV CHANNELS AUDIENCE STRUCTURE BY POPULATION



MG Baltic group increase audience share in big and medium-sized towns, and decrease in small towns. MTG differently than MG Baltic group increase audience share in small towns.

TV CHANNELS AUDIENCE STRUCTURE BY POPULATION

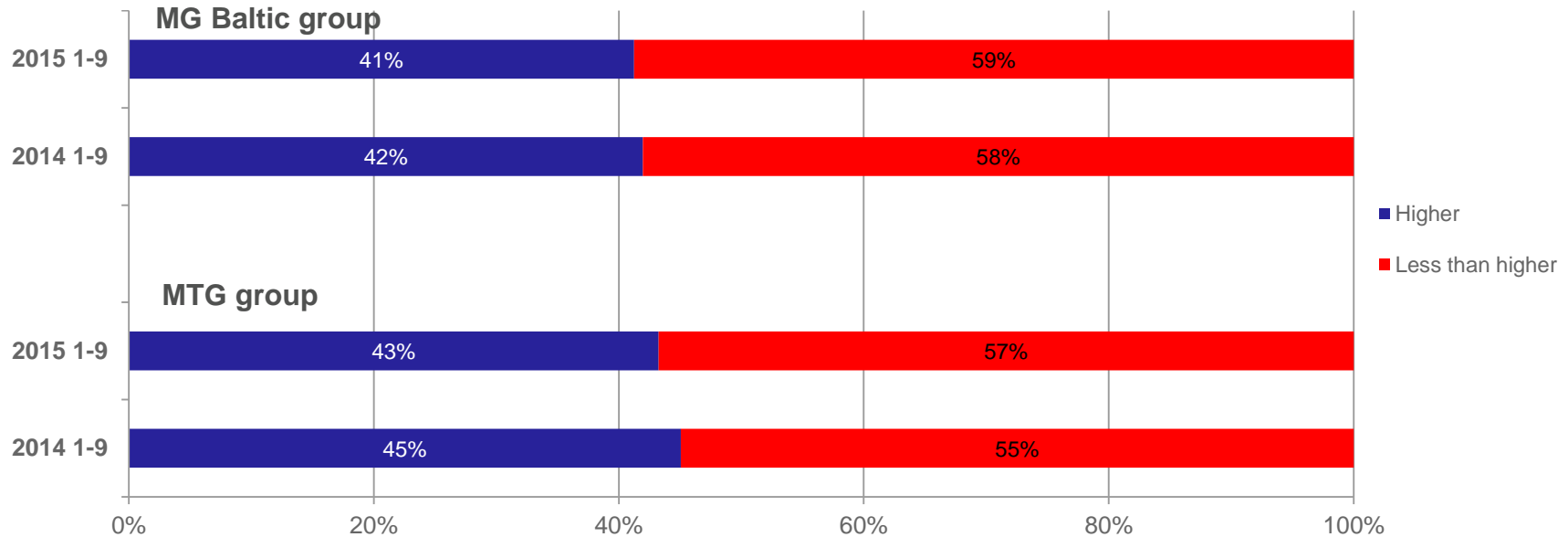


Separate TV channel groups have different audience structure by population.

MTG group have the biggest audience share in small towns, MG Baltic group – in small and medium-sized towns.

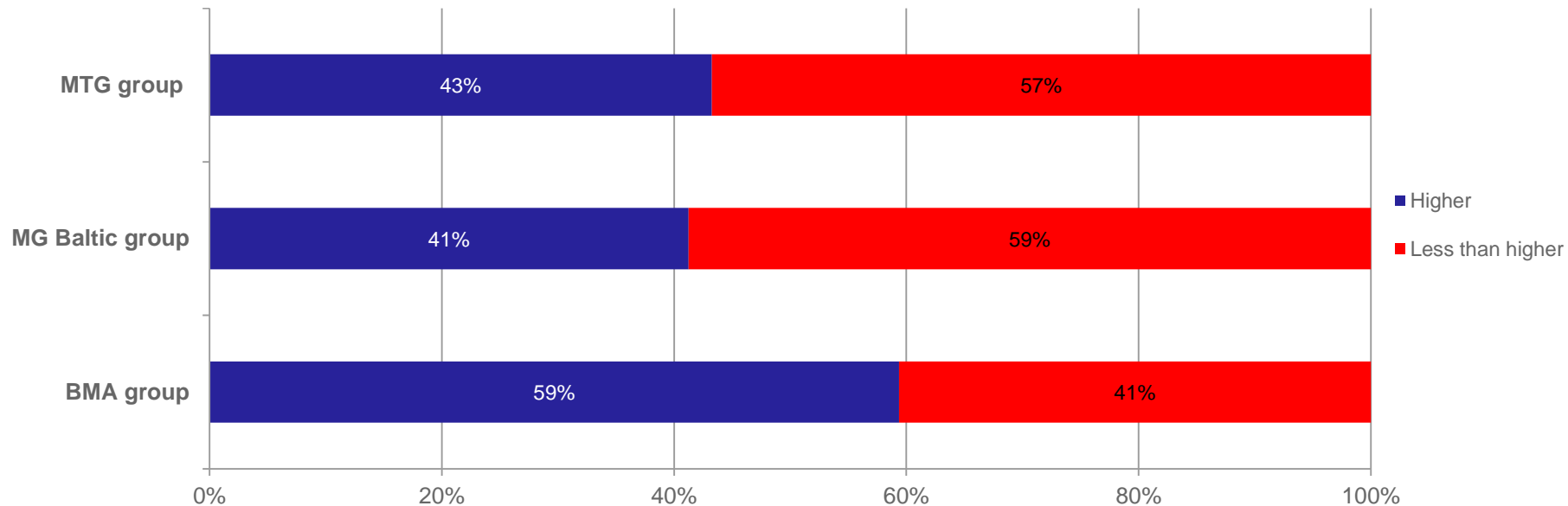
BMA group mostly differs from others with half of audience living in big cities.

TV CHANNELS AUDIENCE STRUCTURE BY EDUCATION



This year MTG and MG Baltic audience with Less than higher education share slightly increased, if compare with the same last year period.

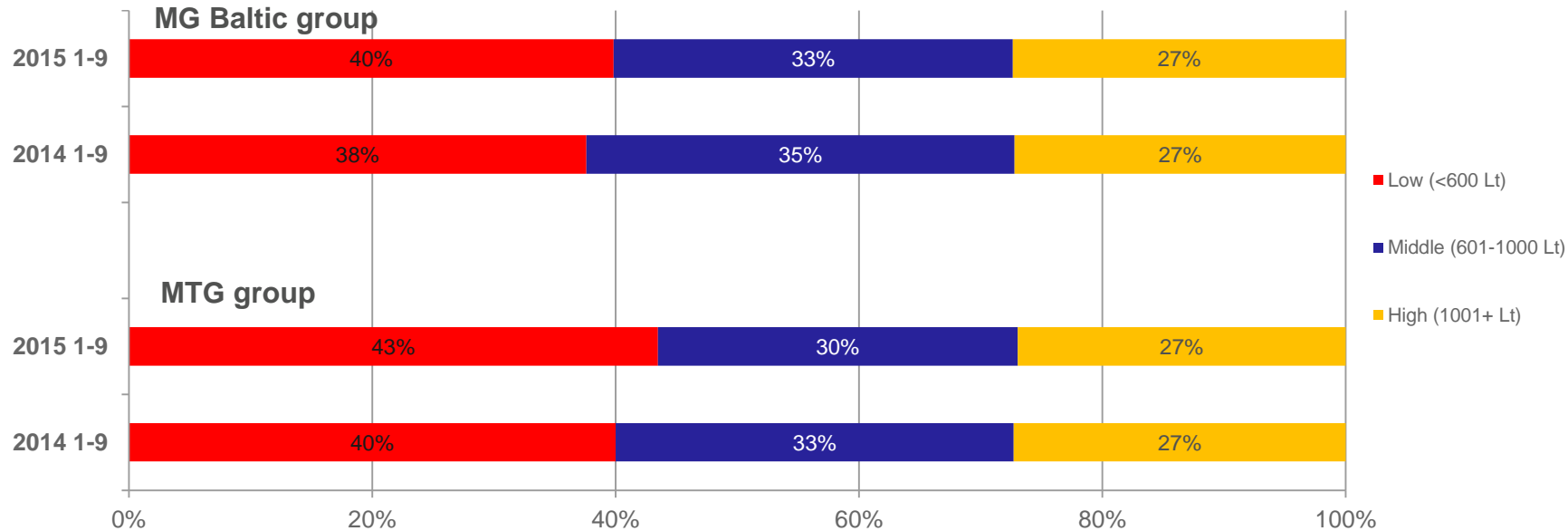
TV CHANNELS AUDIENCE STRUCTURE BY EDUCATION



Separate TV channel groups have different audience structure by education.

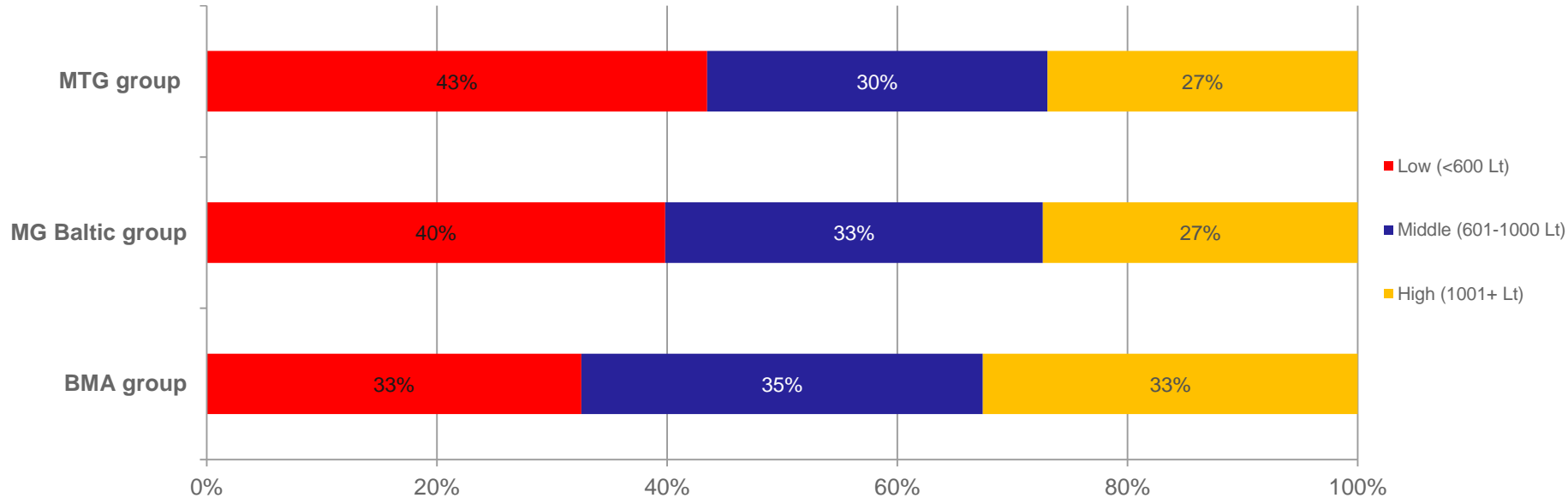
More than half of BMA audience have higher education, however MTG and MG Baltic group more than half of audience have less than higher education.

TV CHANNELS AUDIENCE STRUCTURE BY INCOME



Visible similar trend among both TV channel groups audiences – boosted share of audience with low income.

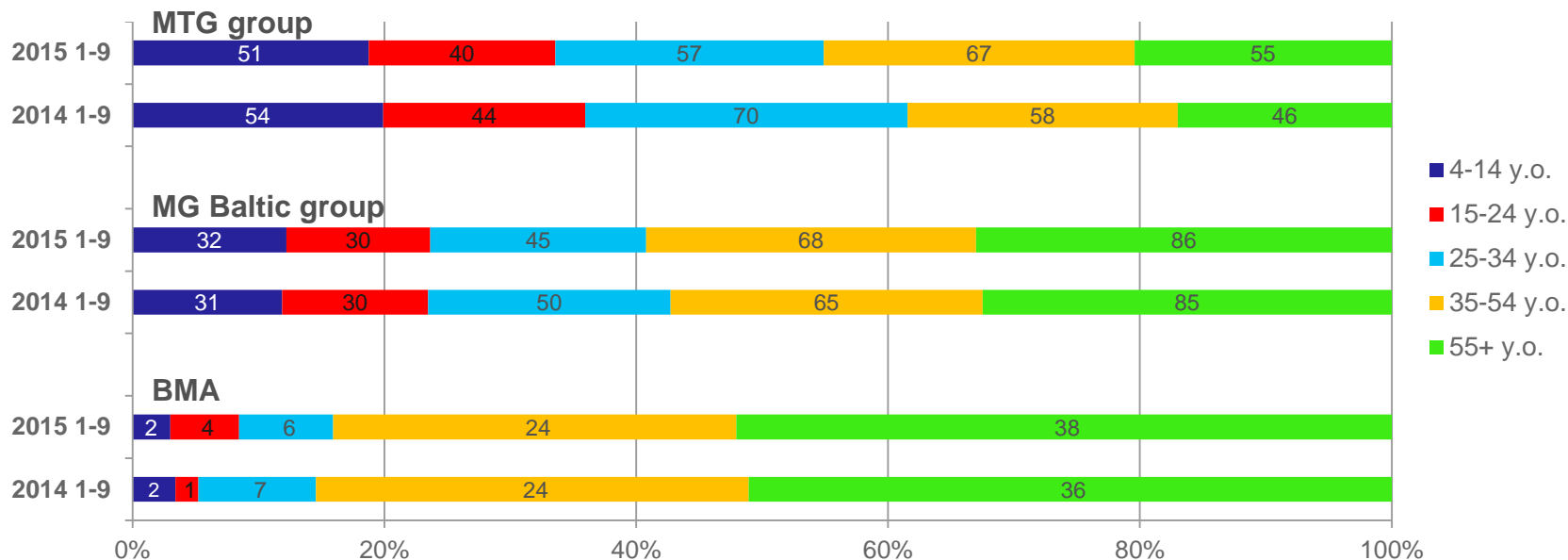
TV CHANNELS AUDIENCE STRUCTURE BY INCOME



MTG and MG Baltic group differs from BMA with the biggest share of audience with low income. BMA have the biggest share of audience with middle income.

AVERAGE MINUTES VIEWED PER DAY BY AGE

This is how much time (minutes) a day on average traditional Lithuanian spends watching TV



MTG – older audience start to spend more time watching TV vs. last year the same period.

MG Baltic – Kids and older audience start to spend more time in front of TV.

BMA – no significant changes – young audience still do not watch Russian language TV channels.

SUMMARY

- National broadcaster LRT and Russian language TV channel RTR started year 2015 with no commercial advertising. Lietuvos Rytas TV channel became a member of MTG group.
- Competition become stronger among the biggest TV groups – MG Baltic group and MTG.
- In general, TV audience has decreased in Lithuania – became older, with less income and more concentrated in small sized towns.
- Women remain the main TV watchers.
- Older people spend more time watching TV than youth.

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