

## 2022 Baltic Digital Market Adex

Total Baltic  
Digital Market

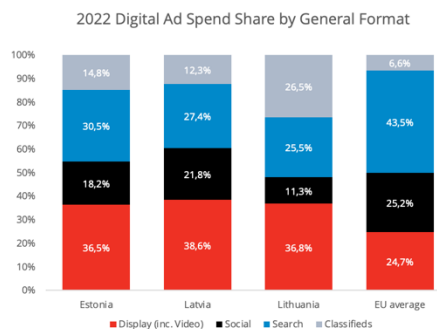
€386m

+14,2% YoY growth

Total European  
Digital Market

€86bn

+9,8% YoY growth



| Digital Format              | Estonia      | Latvia       | Lithuania    | Baltic Market Size (€m) | European Market Size (€bn) | European Market Growth |
|-----------------------------|--------------|--------------|--------------|-------------------------|----------------------------|------------------------|
| Display                     | 26,7         | 23,9         | 39,9         | 90,6                    | 21,2*                      | 10,0%*                 |
| Video                       | 15,0         | 20,6         | 17,8         | 53,4                    |                            |                        |
| Social                      | 20,8         | 25,2         | 17,7         | 63,8                    | 21,70                      | 7,0%                   |
| Search                      | 34,9         | 31,6         | 40,0         | 106,4                   | 37,40                      | 10,7%                  |
| Classifieds                 | 16,9         | 14,2         | 41,5         | 72,6                    | 5,70                       | 5,5%                   |
| <b>Total Digital Market</b> | <b>114,3</b> | <b>115,5</b> | <b>157,0</b> | <b>386,9</b>            | 86,00                      | 9,8%                   |

## IAB Adex Categorization

The categorizations are used across IAB reporting, market overviews and general communication to unify measurement and interpretation of market mechanism.

### Display

|                             |   |
|-----------------------------|---|
| General display advertising | Banners, buttons, skyscrapers, overlays, interstitials, native ads and advertising space without a direct link to the advertiser's website, including programmatic display, integrated content, content marketing, partnerships, sponsorships and digital audio.  |
| Video advertising           | Advertising using video formats, included are: <ul style="list-style-type: none"> <li>• in-stream video advertising (pre-rolls, mid-rolls, post-rolls)</li> <li>• in-stream banner overlays</li> <li>• out-of-stream &amp; in-feed video advertising (e.g. self-play video on social network, not embedded in non-advertising video content)</li> <li>• in-banner video advertising</li> <li>• in-text video advertising</li> </ul> |
| Social                      | Display and text advertising on social networks such as Facebook, Instagram, LinkedIn, etc. We do not count YouTube as 'social'. Social video spend is categorized under video.   |

### Search Advertising

|             |  |
|-------------|--|
| Paid Search | Advertising appearing on specific word requests on search engines. |
|-------------|--|

### Classifieds

|                    |   |
|--------------------|---|
| Online classifieds | Fees paid by an advertiser to display an ad or listing around a specific vertical such as automotive, recruiting and real estate, regardless of the outcome of the ad |
|--------------------|---|

\* Video and Display combined

## Data Collection and Report Coverage

Data collection and modelling was carried out by the IAB Baltics in collaboration with IAB Europe, using data from business registries, Kantar and Gemius publications, Local Revenue Agencies, and trade associations. If you wish to contribute the data collection, contact the IAB research group at [research@iabbaltics.eu.g](mailto:research@iabbaltics.eu.g). European data covers 29 markets (Austria, Belgium, Bulgaria, Czech Republic, Croatia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine).

IAB Baltics reporting covers local publishing houses, local ad networks, local classifieds, global media companies (Alphabet, Meta, TikTok) ad products and measures advertiser net spend targeted to only corresponding countries. In other words, advertiser digital media spend without agency fees made to reach consumers in Estonia, Latvia and Lithuania. European data is collected by corresponding countries IAB chapters and normalized centrally.