

DIGITAL ADEX

2024



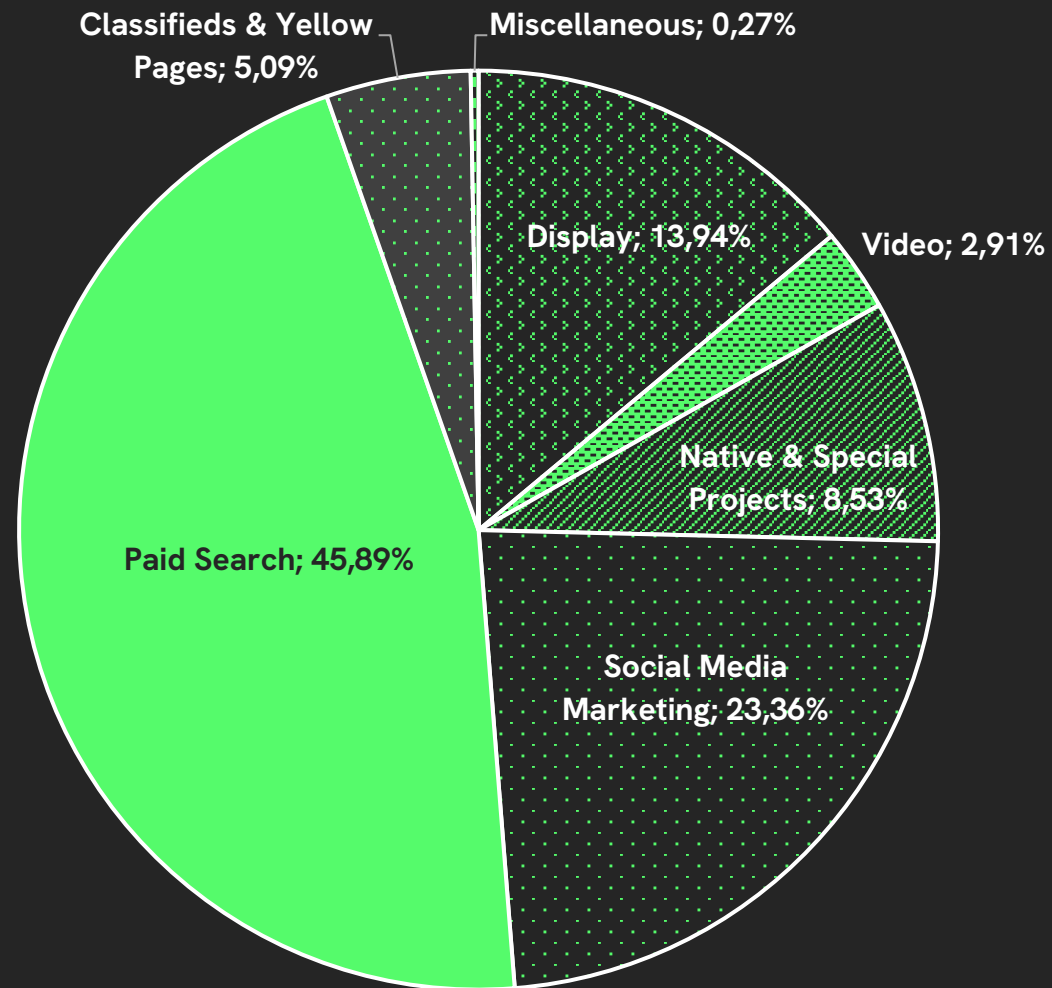
Analiza ukupnih ulaganja u digitalni marketing u Hrvatskoj

Istraživanje medijskog zakupa kroz sve oblike kanala i tehnologija koje provode agencije Momentum i Ipsos, a temelji se na točnim iznosima oglašavanja od izdavača (Internet portala), marketinških agencija te izvještajima medijskih platforma

NET	2022	2023	2024	2025 FC
TOTAL	248.100.000 €	279.400.000 €	339.930.000 €	373.180.000 €
DISPLAY	40.400.000 €	41.900.000 €	47.400.000 €	51.500.000 €
VIDEO	8.600.000 €	9.300.000 €	9.900.000 €	11.100.000 €
NATIVE & SPECIAL PROJECTS	18.600.000 €	22.900.000 €	29.000.000 €	31.400.000 €
SOCIAL MEDIA MARKETING	61.900.000 €	66.300.000 €	79.400.000 €	85.200.000 €
PAID SEARCH	105.600.000 €	124.000.000 €	156.000.000 €	171.700.000 €
CLASSIFIEDS & YELLOW PAGES	12.400.000 €	14.400.000 €	17.300.000 €	21.300.000 €
MISCELLANEOUS	600.000 €	600.000 €	930.000 €	980.000 €

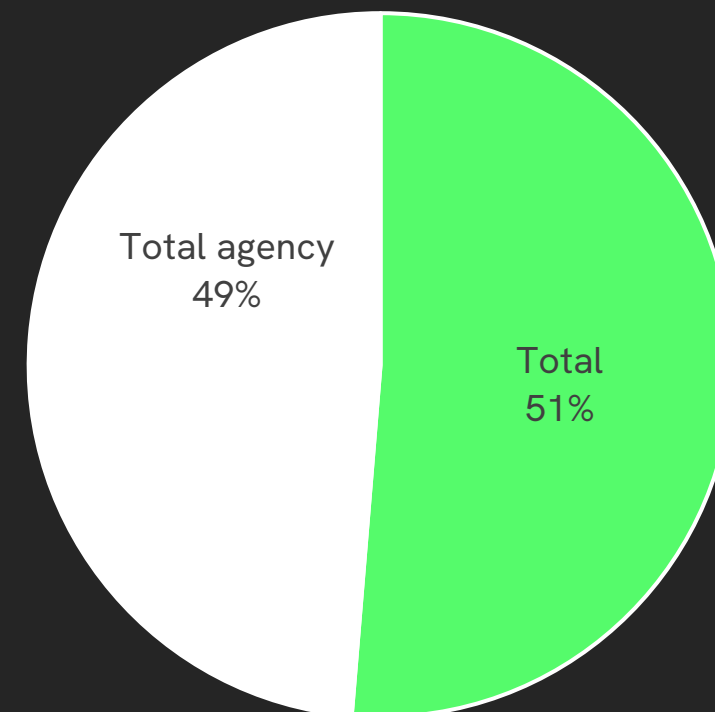
GROWTH 23 VS 22	GROWTH 24 VS 23	GROWTH 25 VS 24
12,6%	21,7%	9,8%
3,7%	13,1%	8,6%
8,1%	6,5%	12,1%
23,1%	26,6%	8,3%
7,1%	19,8%	7,3%
17,4%	25,8%	10,1%
16,1%	20,1%	23,1%
0,0%	55,0%	5,4%

TOTAL REVENUE



AGENCY CLIENTS SHARE ESTIMATE IN TOTAL REVENUE

NET	2024	SHARE
TOTAL	339.930.000 €	
TOTAL AGENCY*	165.530.000 €	48,7%



* Estimated via HUDI B2B AdEx research

TOTAL REVENUE W/ INFLATION ADJUSTMENT

NET	2022	2023	2024*	2025 FC**
TOTAL	248.100.000 €	279.400.000 €	336.400.000 €	369.250.000 €
DISPLAY	40.400.000 €	41.900.000 €	45.800.000 €	49.700.000 €
VIDEO	8.600.000 €	9.300.000 €	9.600.000 €	10.800.000 €
NATIVE & SPECIAL PROJECTS	18.600.000 €	22.900.000 €	28.000.000 €	30.300.000 €
SOCIAL MEDIA MARKETING	61.900.000 €	66.300.000 €	79.400.000 €	85.200.000 €
PAID SEARCH	105.600.000 €	124.000.000 €	156.000.000 €	171.700.000 €
CLASSIFIEDS & YELLOW PAGES	12.400.000 €	14.400.000 €	16.700.000 €	20.600.000 €
MISCELLANEOUS	600.000 €	600.000 €	900.000 €	950.000 €

GROWTH 23 VS 22	GROWTH 24 VS 23	GROWTH 25 VS 24
12,6%	20,4%	9,8%
3,7%	9,3%	8,5%
8,1%	3,2%	12,5%
23,1%	22,3%	8,2%
7,1%	19,8%	7,3%
17,4%	25,8%	10,1%
16,1%	16,0%	23,4%
0,0%	50,0%	5,6%

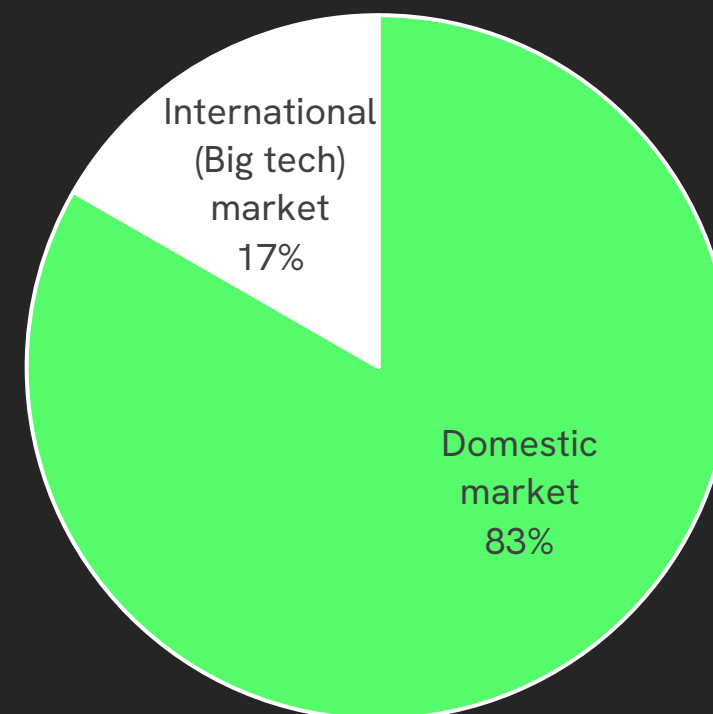
* Estimated inflation for 2024, 3,40%

** Estimated inflation for 2025, 3,60%

DISPLAY REVENUE

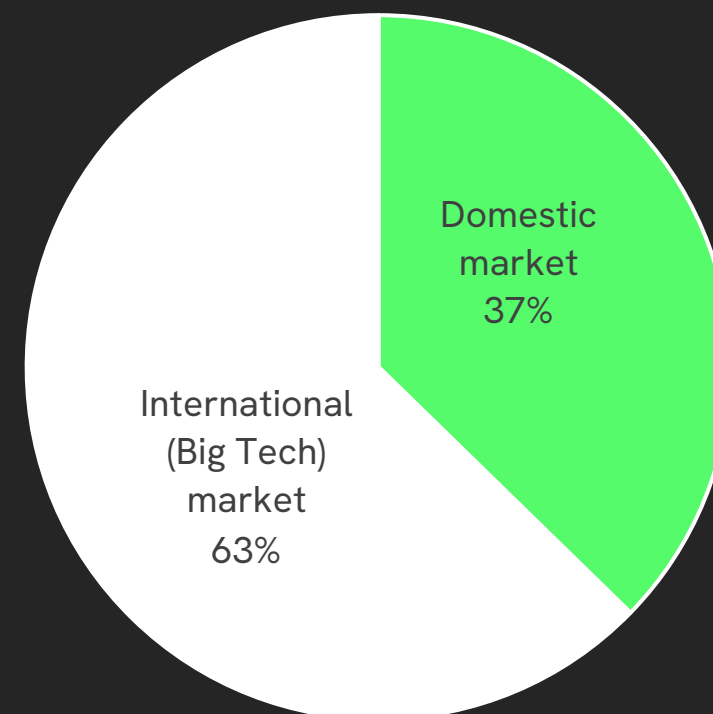
DOMESTIC VS. INTERNATIONAL

NET	2024	SHARE
DISPLAY	47.400.000 €	
DOMESTIC MARKET	39.500.000 €	83,3%
INTERNATIONAL (BIG TECH) MARKET	7.900.000 €	16,7 %



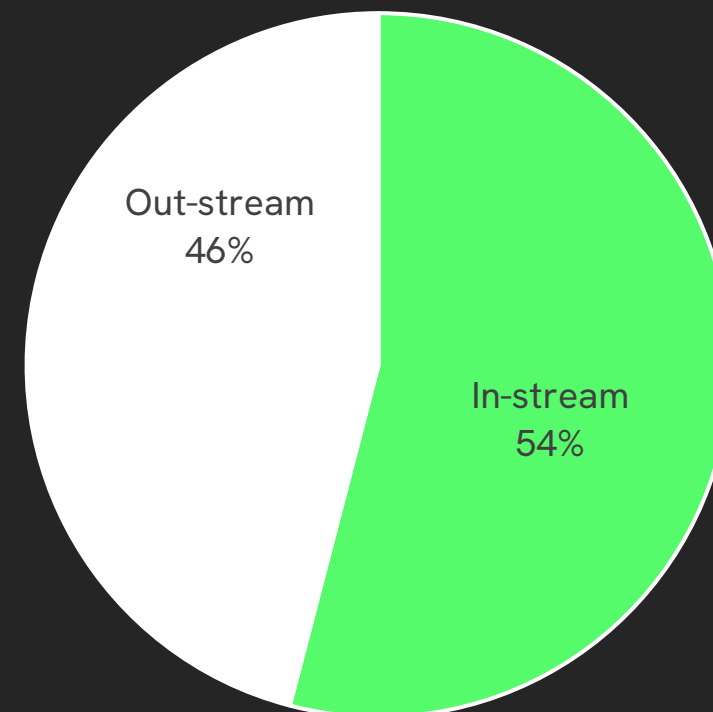
TOTAL VIDEO REVENUE DOMESTIC VS. INTERNATIONAL

NET	2024	SHARE
VIDEO	9.900.000 €	
DOMESTIC MARKET	3.700.000 €	37,3%
INTERNATIONAL (BIG TECH) MARKET	6.200.000 €	62,7 %



DOMESTIC VIDEO REVENUE IN-STREAM VS. OUT-STREAM

NET	2024	SHARE
DOMESTIC MARKET	3.700.000 €	
IN-STREAM	2.000.000 €	54,0%
OUT-STREAM	1.700.000 €	46,0%



NET	2024	SHARE
NATIVE & SPECIAL PROJECTS	29.000.000 €	
NATIVE & PR	14.700.000 €	50,6%
NATIVE NETWORKS	9.100.000 €	31,4%
DIGITAL SPECIAL PROJECTS	5.200.000 €	18,0%

