



DIGITAL AD SPEND STUDY FOR 2022.

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IAB ADEX DIGITAL AD SPEND STUDY

- IAB (Interactive Advertising Bureau) AdEx reports are the industry benchmark numbers worldwide
- The first AdEx report was published for the US market in 1996
- IAB Europe started to publish its Pan-European AdEx study in 2006
- IAB Serbia joined in 2012

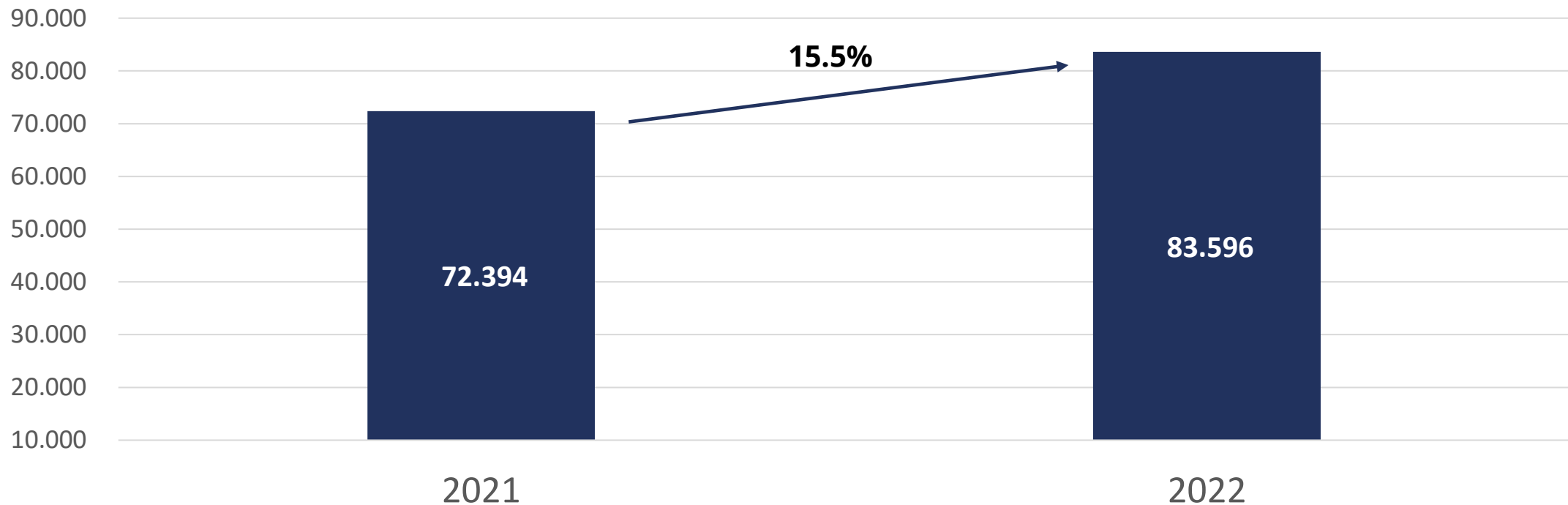
METHODOLOGY

- IAB Europe introduced a new methodology in 2015
- The study analyzes the gross digital ad spend
- Mobile ad spend is a sub-segment within key areas, not affecting the total
- Social and Video part of DISPLAY segment
- This study is a result of research, calculation and estimation of IAB Serbia expert team consisting of key industry players

**Market ad spend in Serbia 2022:
€ 83,6 million**

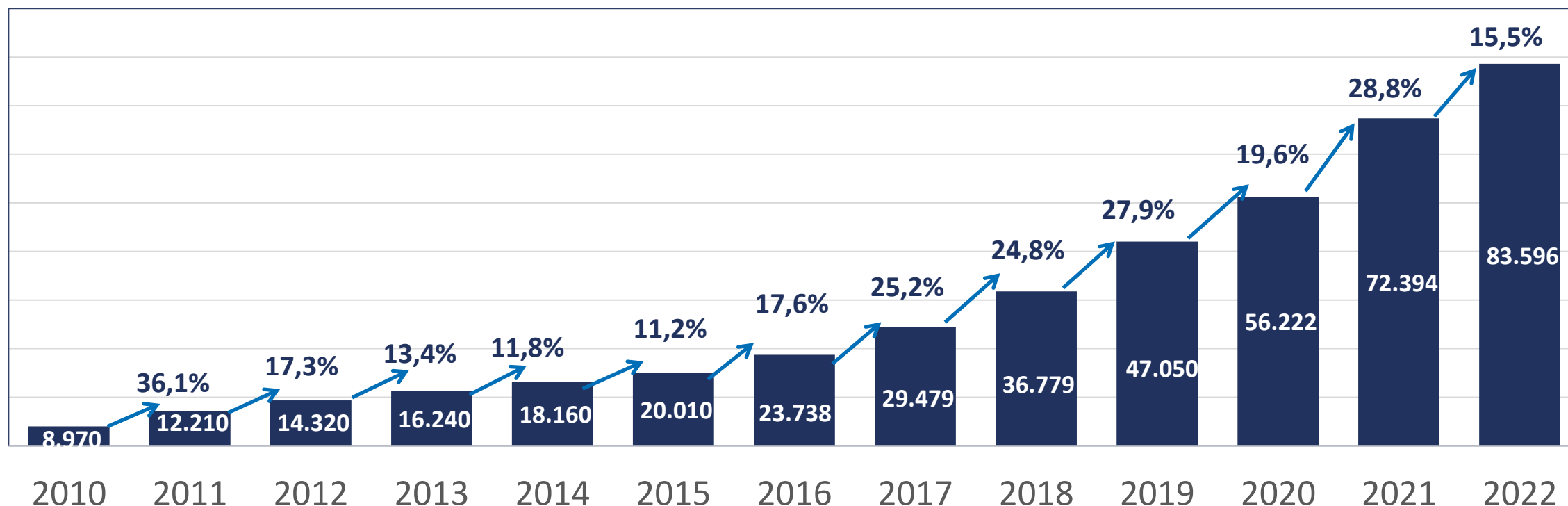
Digital Advertising Market Growth

Total YoY market growth 2021 - 2022 ('000 €)



Digital Advertising Market Growth

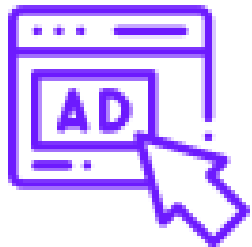
Total YoY market growth 2010 – 2022 ('000 €)



KEY SEGMENTS



DISPLAY



PAID SEARCH

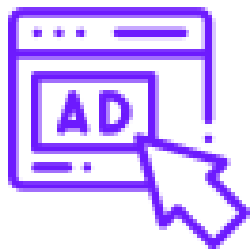


**CLASSIFIEDS
AND
DIRECTORIES**



Market Value by Key Segments in 2022.

DISPLAY



€ 54,2 MM
+15,8%

PAID-FOR SEARCH



€ 13,9 MM
+14%

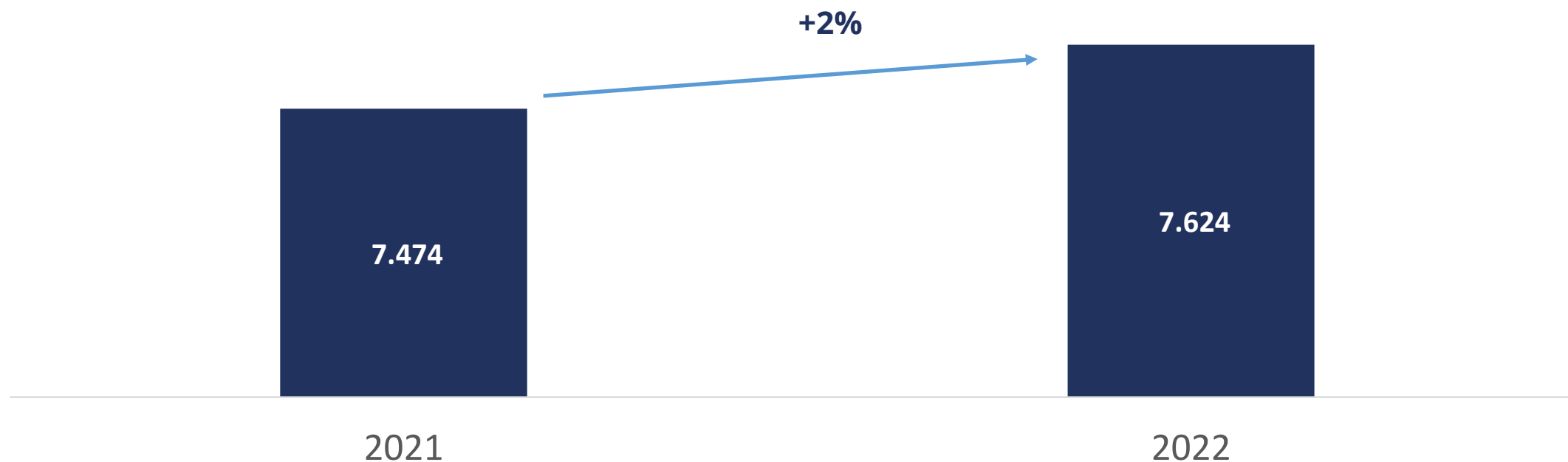
CLASSIFIEDS AND DIRECTORIES



€ 10,5 MM
+15,9%

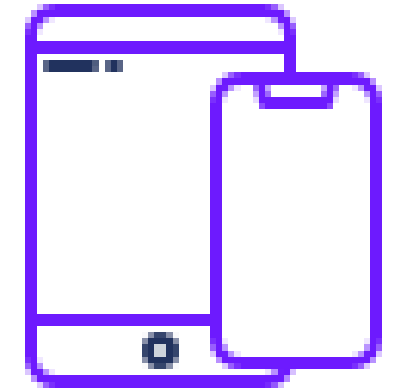
LOCAL DISPLAY MARKET VALUE

Total YoY market 2021 - 2022 ('000 €)

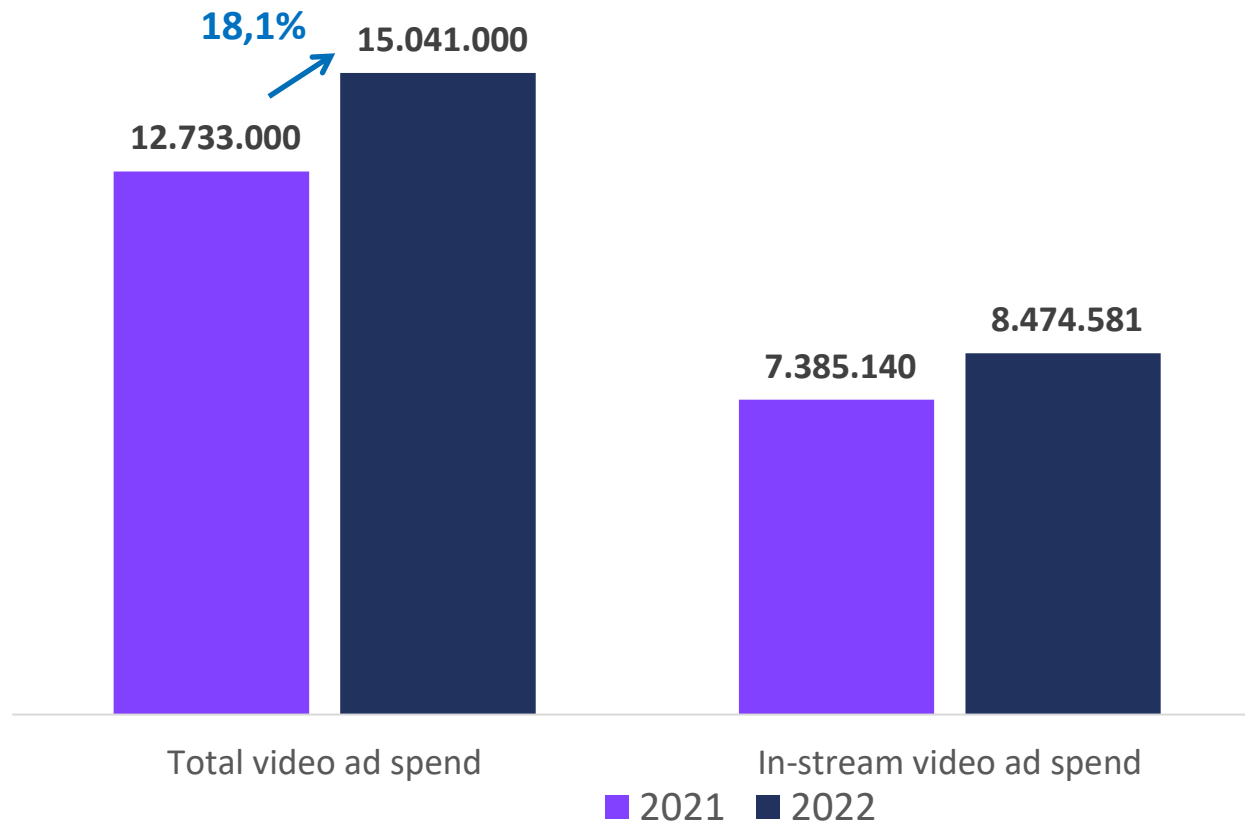


MOBILE ADVERTISING

- Estimated mobile ad spend in 2022:
€ 66.7 MM (+16,8%)
- Share of **88%** within total Display spend



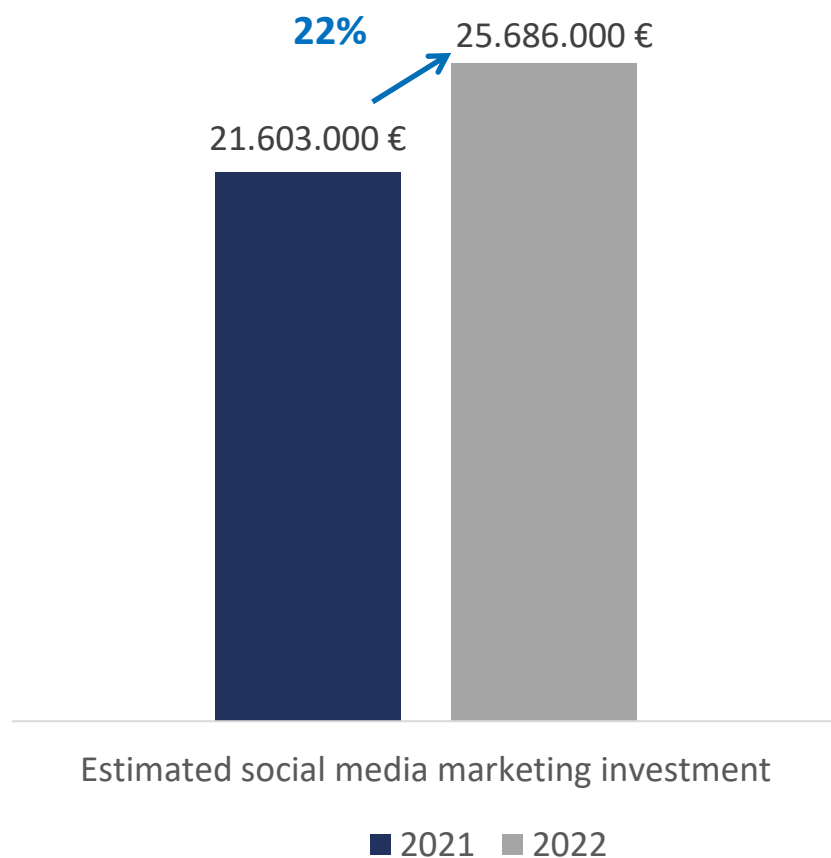
ONLINE VIDEO ADVERTISING



Estimated online video market
value in 2022:

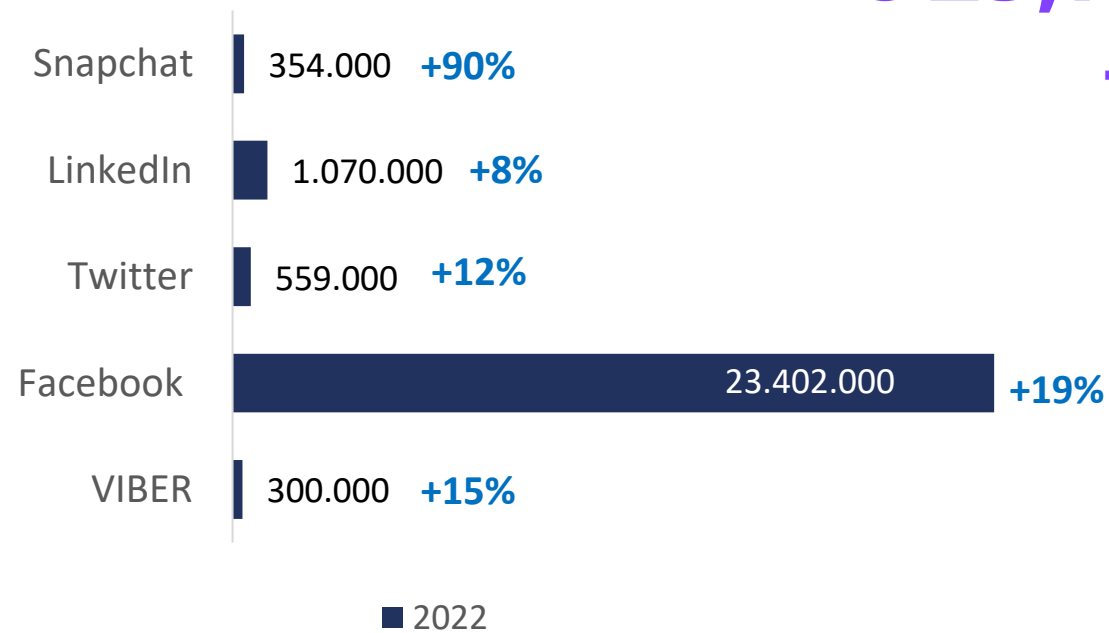
€ 15,04 MM
+18,1%

SOCIAL MEDIA MARKETING



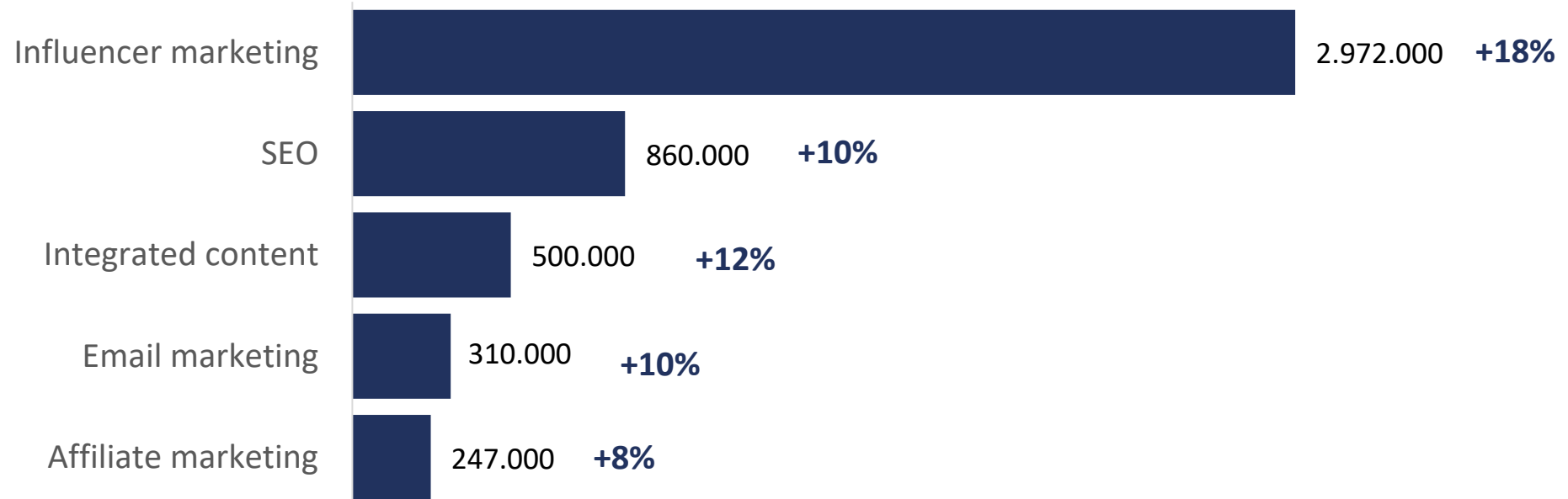
Estimated social media marketing value in 2022:

€ 25,7 MM
+22%

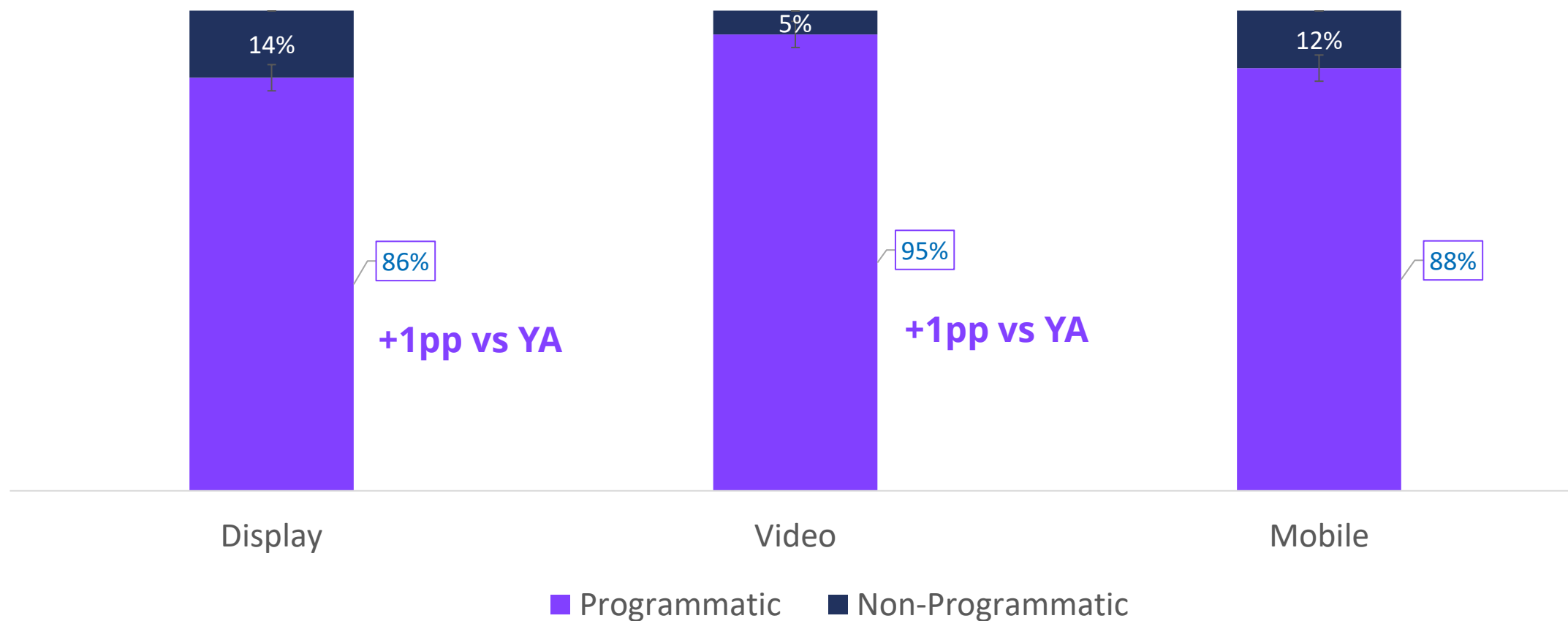


OTHER CHANNELS

2022 market value estimation



PROGRAMMATIC AD SPEND



KEY TAKEAWAYS:

- Digital market value € 83,6 MM in 2022.
- Double digit growth of 15.5%.
- Among top segments **SOCIAL** has the highest investment growth (22%), followed by **VIDEO** (18%)
- **DISPLAY** represent 65%, **SOCIAL** 31% and **SEARCH** 17% of total digital investment in 2022.
- **INFLUENCER MARKETING** still relevant, with a growth of 18%.
- **LOCAL DISPLAY** with 2% increase, after two years of negative trend.
- Digital ad spend per capita still one of the lowest in Europe (12,6 €), compared to European average of 115 € (2021.)



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