IAB Ireland & IRM Online Adspend Study 2024

AN IRM REPORT COMMISSIONED BY IAB IRELAND

13.05-2025

INSTITUTE FOR ADVERTISING AND MEDIA STATISTICS

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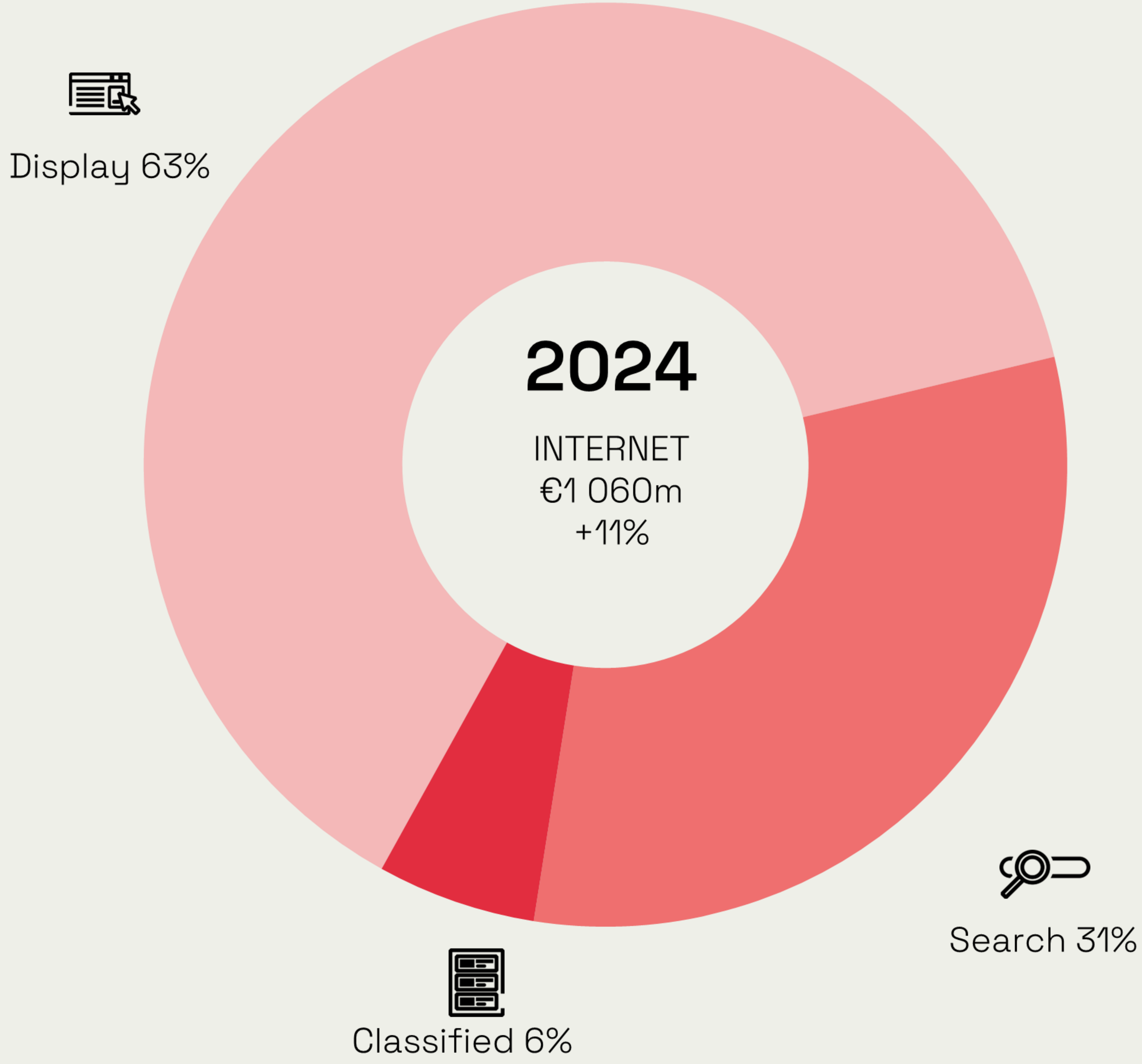
Double digit growth as digital adspend surpasses €1b for the first time

2024

Digital adspend in 2024

2024	± 2023	2023
€1 060m	11%	€959m

Digital Adspend by Main Category



Category	2023-2024 Change
Display	+13%
Search	+6%
Classified	+7%

INSTITUTE FOR ADVERTISING AND MEDIA STATISTICS

Digital Adspend 2024

Digital adspend	2024 (€m)	± 2023 (%)	2023 (€m)
Display total	**669**	**13%**	**590**
Banners: Standard display	79	-2%	80
Banners: Section take-overs/Tenancy	11	18%	9
Native advertising	7	18%	6*
Social (incl. social video)	515	16%	446
Video (non-social)	39	25%	31
Digital Audio	19	8%	18
Search	**331**	**6%**	**314**
Classified	**59**	**7%**	**55**
Total digital adspend	**1 060**	**11%**	**959**

*Native advertising spend in 2023 has been revised based on restatements from participants.

For methodology and definitions, please see appendix.

Summary

Digital adspend has grown swiftly during the last five years, from a total investment of €615m in 2019 to over a €1b in 2024. On average the growth rate has amounted to 12% per year during the period, making it possible for the market to surpass €1b for the first time in 2024.

2024 is yet another strong year for digital adspend. Growth amounts to 11% relative 2023, and total adspend now amounts to €1 060m.

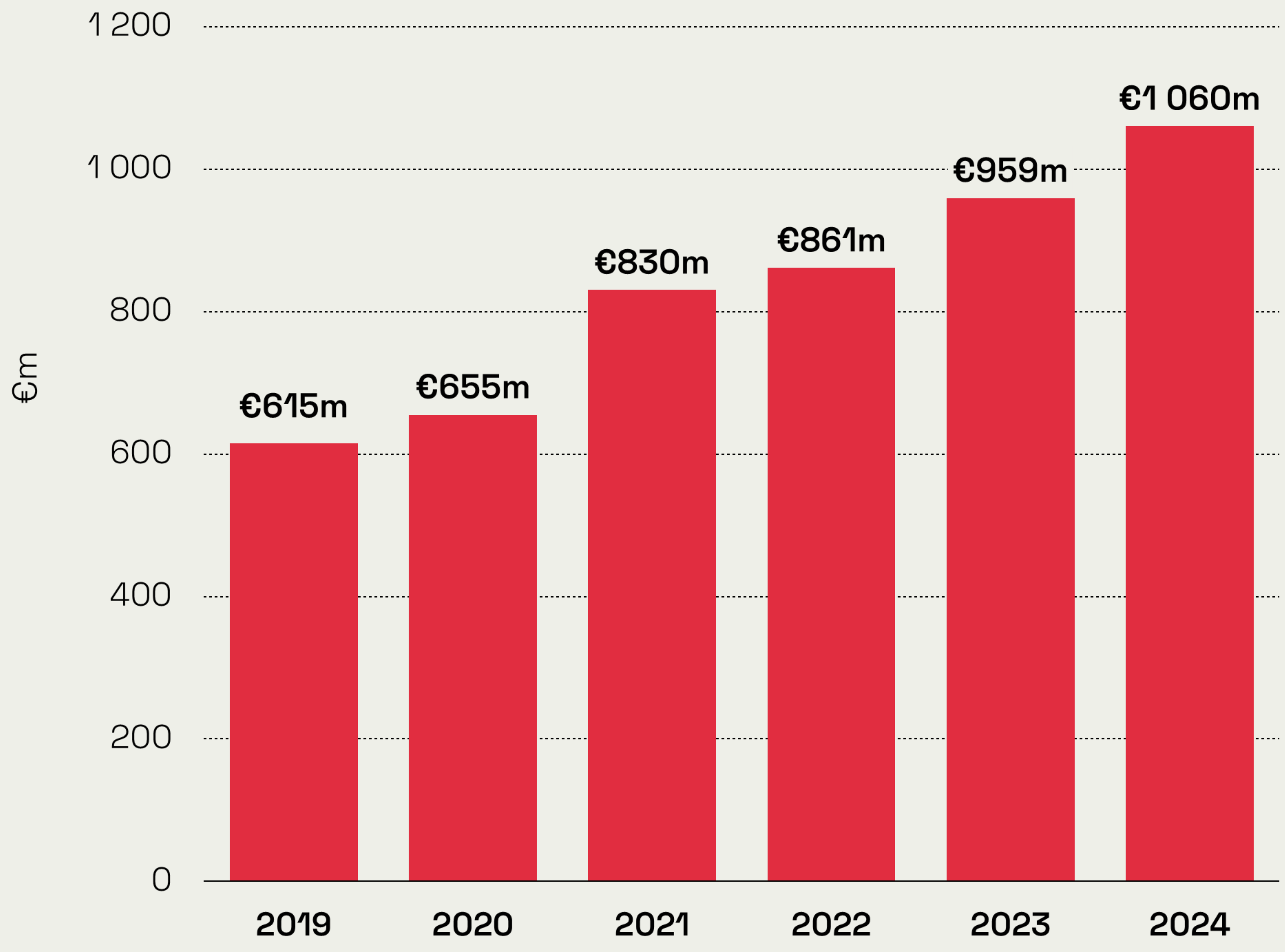
Display advertising includes social, banners, native, video and digital audio. Display advertising accounts for 63% of total digital advertising during the year corresponding to a turnover of €669m. 2024 was a strong year for display advertising, with revenues growing by 13% compared to 2023. The growth rate for display was driven by the strong performance of video and social advertising.

In total search represents just over 31% of the total adspend. In 2024, the revenue amounts to €331m. The growth rate was 6%, resulting in a category growth that is somewhat lower relative to overall digital advertising.

Classifieds generated €59m in 2024 corresponding to a share of 6% of digital adspend. The category grew by 7%, slightly less than the development for total online adspend growth.

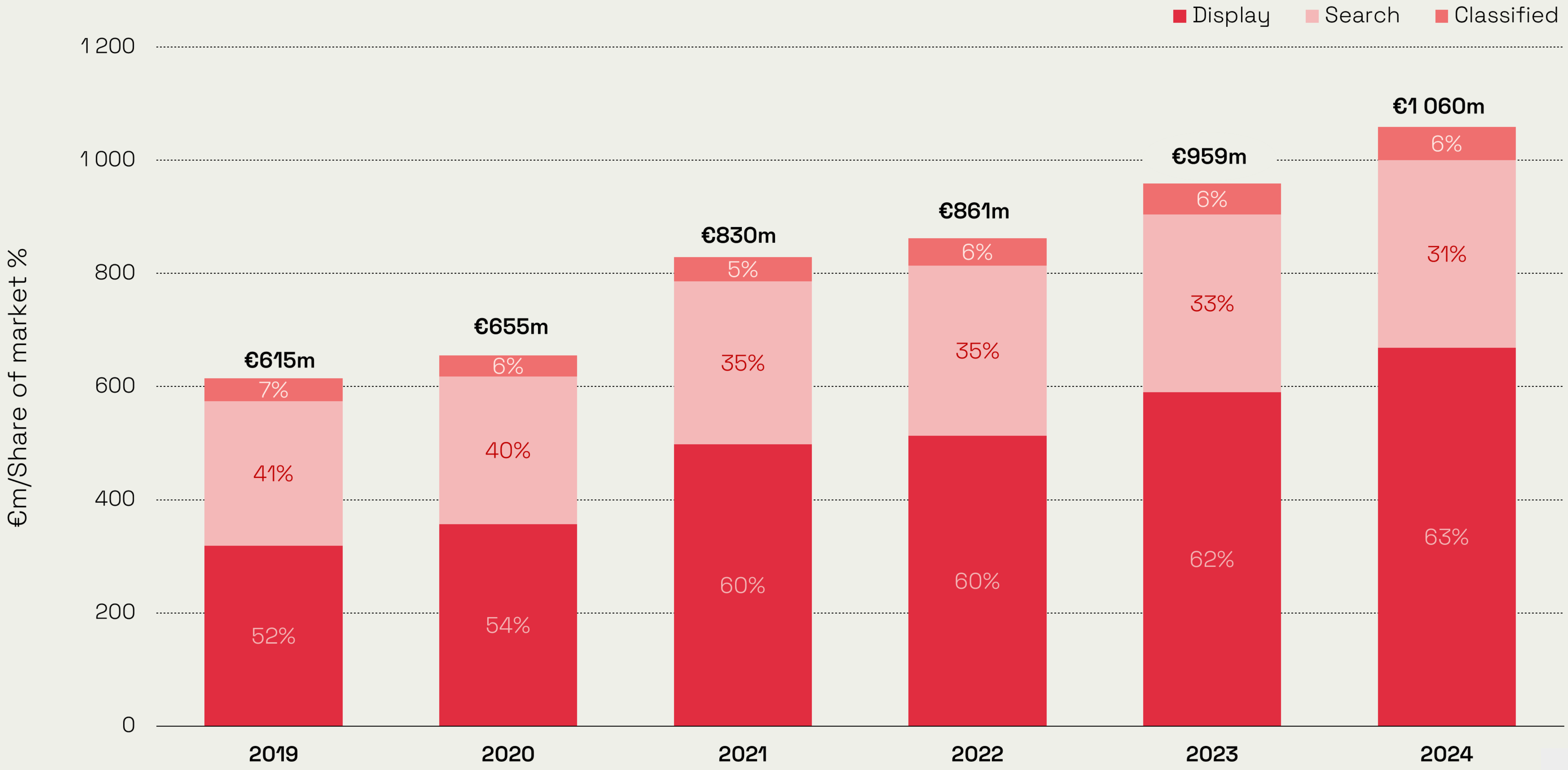
For methodology and definitions, please see appendix.

Total digital adspend per year (€m)



Growth (% year on year)	17%	7%	27%	4%	11%	11%

Digital Media Mix by Main Category



Display

2024 was a good year for display advertising, with revenues growing by 13% compared to 2023. In total, investments in display advertising during 2024 amounted to over €669m. Display advertising includes social, banners, native, video and digital audio.

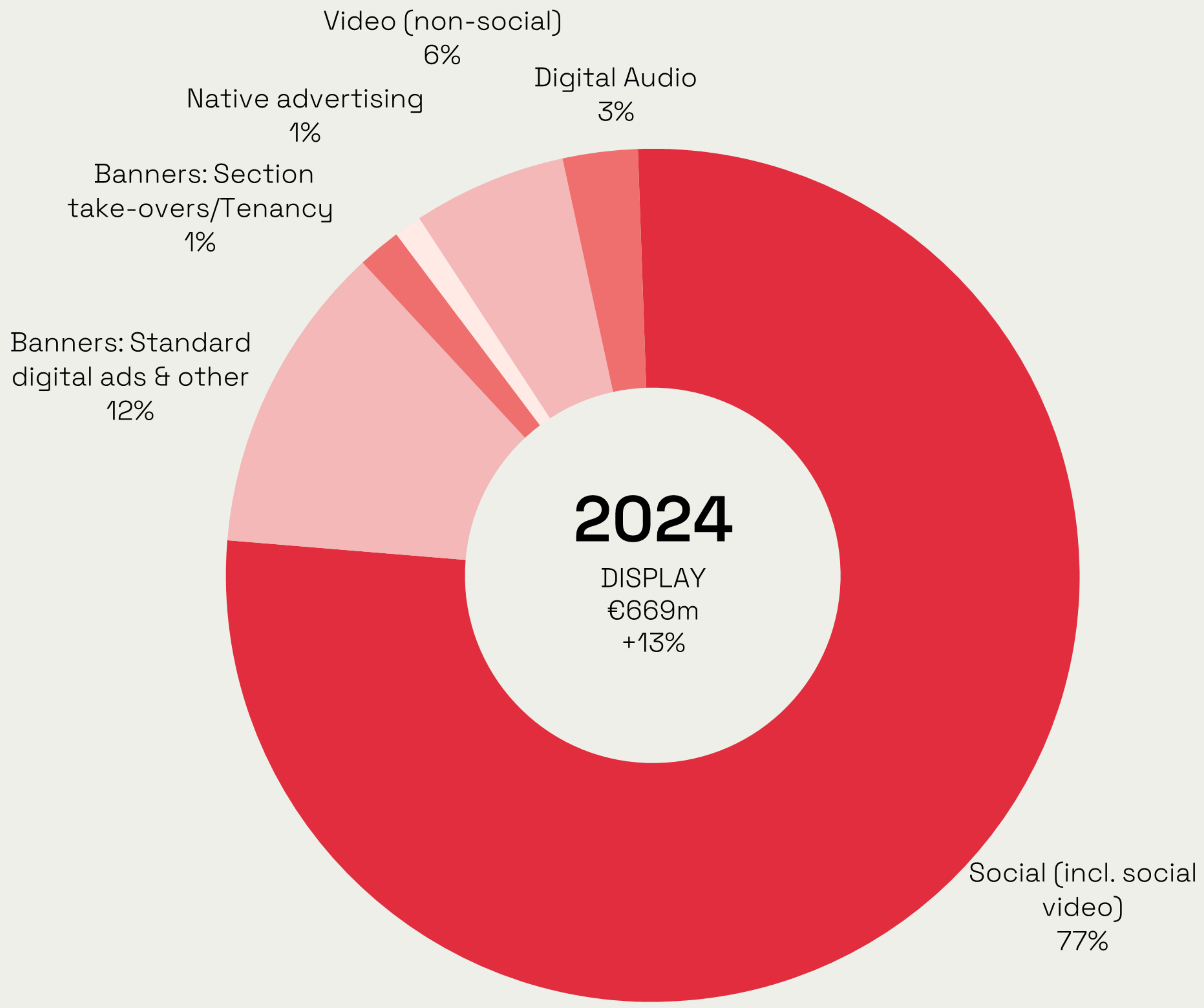
Social has shown significant growth in recent years and accounts for an increasing share of display advertising. In 2024, 77% of the investment in display advertising can be attributed to social platforms including social video. The category continues to grow strongly in 2024, with a 16% increase compared to 2023.

Banners consists of a subset of categories: standard display and section takeovers / tenancy. Standard display recorded a decline of -2% in 2024 compared to 2023. In 2024, the advertising revenue from standard display was €79m. The section take-overs / tenancy subset of banners on the other hand have attracted advertisers during 2024, resulting in a strong growth of 18% relative 2023. Adspend for take-overs / tenancy was €11m. The indication is that banner advertisers are migrating from standard ads towards take-overs / tenancy.

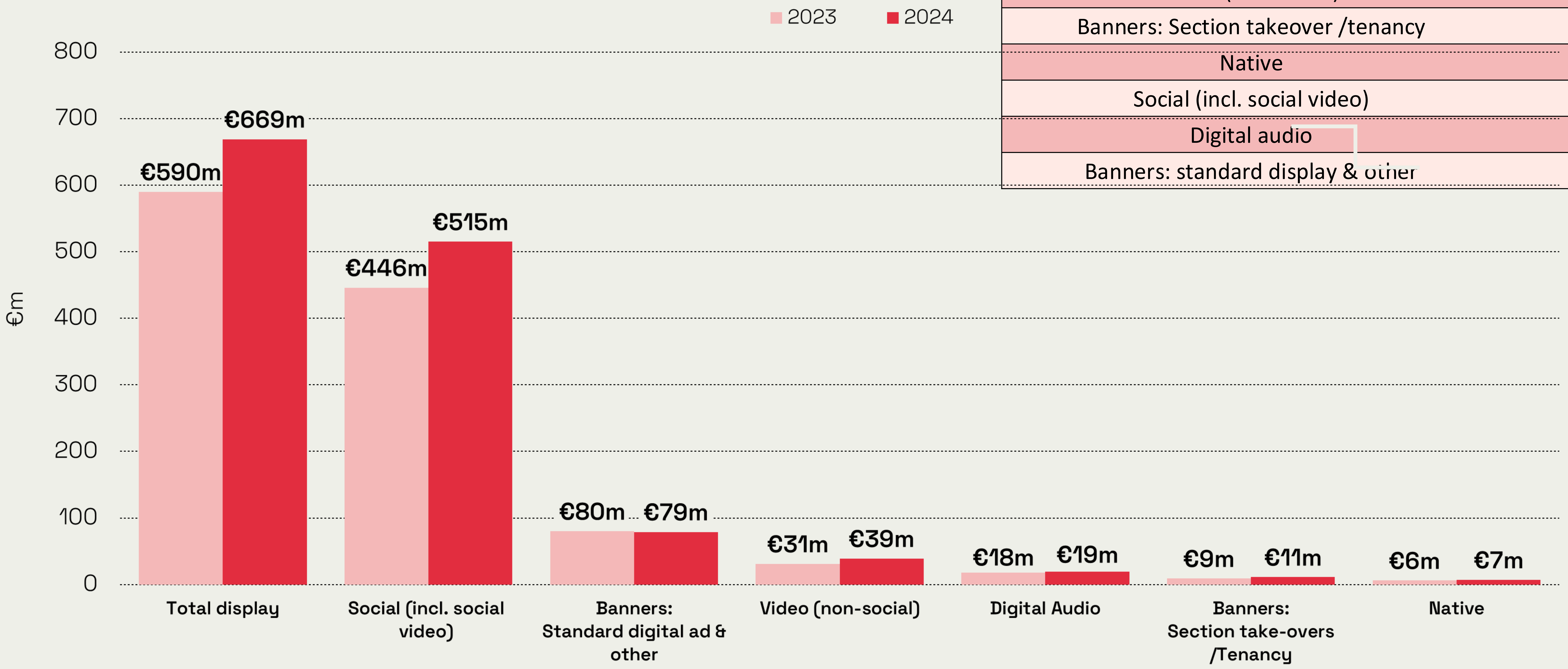
For non-social video 2024 was a strong year, with the category growing by 25%. Video is divided into three subsets: instream, outstream and CTV. Please see page 11 for a detailed description of the development for non-social video.

Digital audio reaches a turnover of €19m in 2024. Growth has slowed since last year and is 8% in 2024 relative 2023.

Native is the smallest category within display, accounting for just 1% of display advertising. The category generated €7m, corresponding to a growth of 18% in 2024 compared to 2023.



Display 2023-2024



Category	2023-2024 Change
Video (non-social)	+25%
Banners: Section takeover /tenancy	+18%
Native	+18%
Social (incl. social video)	+16%
Digital audio	+8%
Banners: standard display & other	-2%

Native advertising spend in 2023 has been revised based on restatements from participants.

Turnover in m€, current prices. Change in percent versus previous year.

Detailed Digital Media Mix – Non Social Video

Non-social video consists of subcategories instream, CTV and outstream & other.

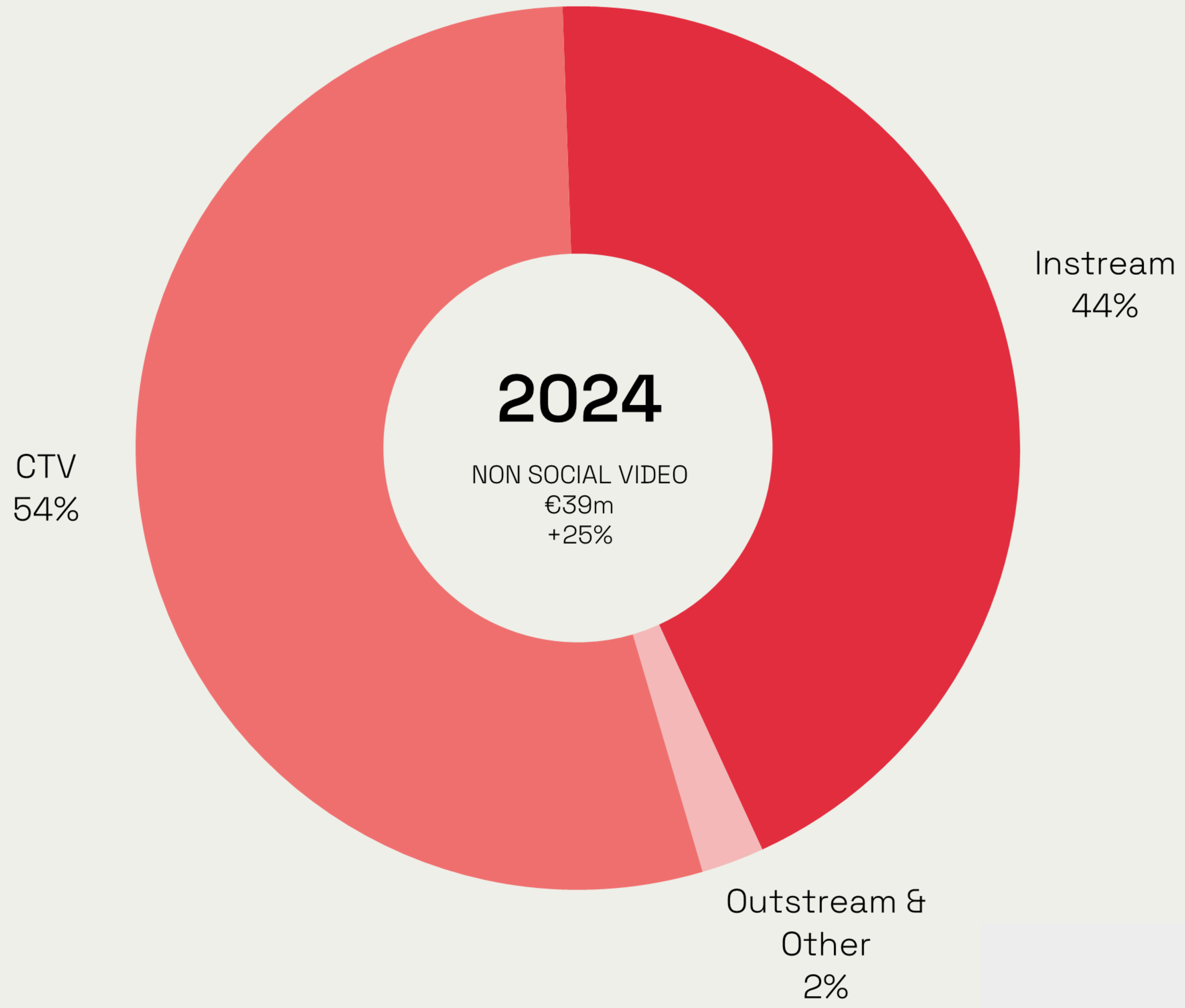
The largest category is CTV with a turnover of €21m. This is also the fastest growing category in this report, with a growth of 37% relative 2023.

Instream video, with a turnover of €17m also shows a strong development of 17% compared to last year.

Finally, outstream & other, is the smallest category with a turnover of only €1m. Small categories tend to be very volatile, which is also the case for outstream & other, registering a decline of -33% in 2024 relative to 2023.

Category	Turnover 2024	2023-2024 Change
CTV	€21m	+37%
Instream	€17m	+17%
Outstream & other	€1m	-33%
Total video	**€39m**	**+25%**

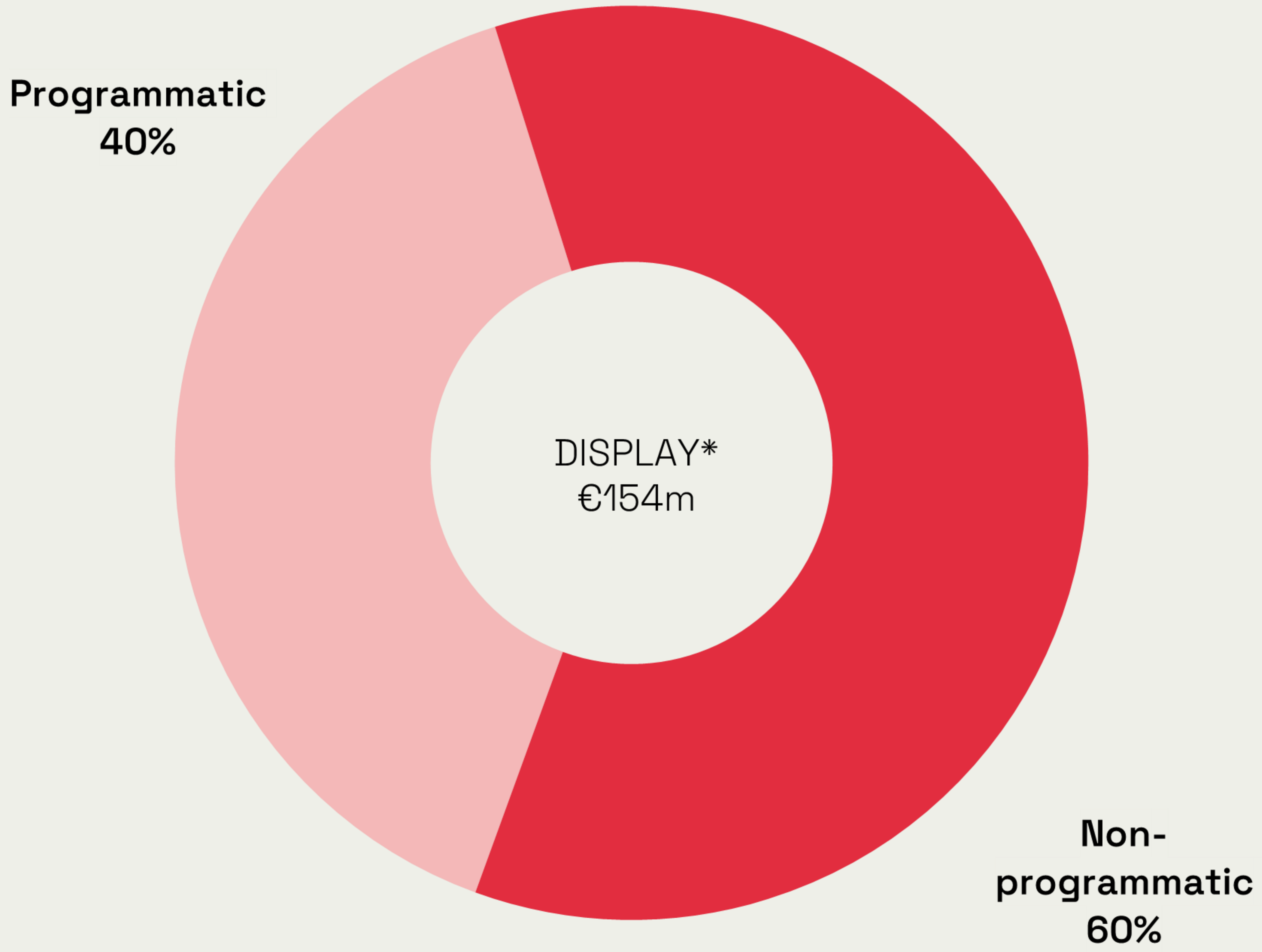
Turnover in m€, current prices. Change in percent versus previous year.



Programmatic share 2024

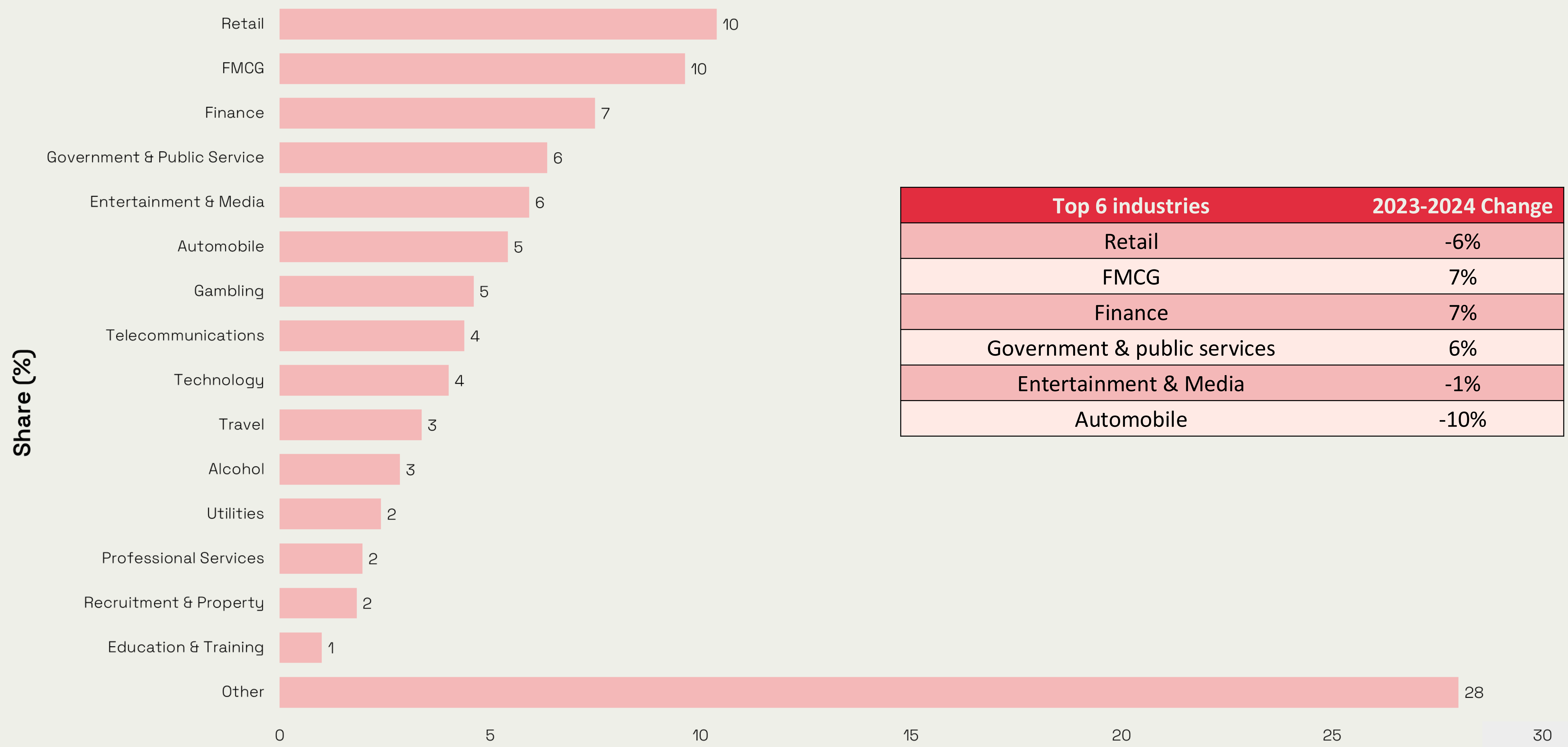
Programmatic share is calculated as a share of display excluding social. Total display excluding social includes the investments in banners (standard display and section take-overs/tenancy), non-social video, native and audio.

Total display excluding social amounts to €154m in 2024. The programmatic share amounts to 40% in 2024. This corresponds to a total of €62m traded programmatically in 2024.



* Excludes social

Display Adspend by Industry Category



Top 6 industries	2023-2024 Change
Retail	-6%
FMCG	7%
Finance	7%
Government & public services	6%
Entertainment & Media	-1%
Automobile	-10%

Figures and percentages are rounded, Industry breakdown based on non-social display revenue, Some participating companies were unable to allocate their digital advertising revenue by industry category, resulting in a significant amount accounted under 'Other' | Source: IAB / IRM Online Adspend study 2024

Industry Outlook: Respondents' View

According to the respondents, digital adspend will continue to grow during 2025, and growth is predicted at 8%.

Video and audio continue to be key opportunities in 2025, while many fear an economic downturn and the increasing level of regulation could impact growth in the industry negatively.

Growth opportunities

Video

67% of respondents identify video as a growth opportunity in 2025.

Video was the fastest growing category in 2024, and the survey indicates continued opportunities.

Audio

58% of respondents identify audio as a growth opportunity in 2025.

Audio has been growing swiftly during the last few years, but 2024 meant a smaller growth of 8% for the category. Respondents indicate that 2025 may bring back more growth to the audio category.

Challenges

Economic Downturn

67% of respondents are concerned with the challenge economic downturn will pose.

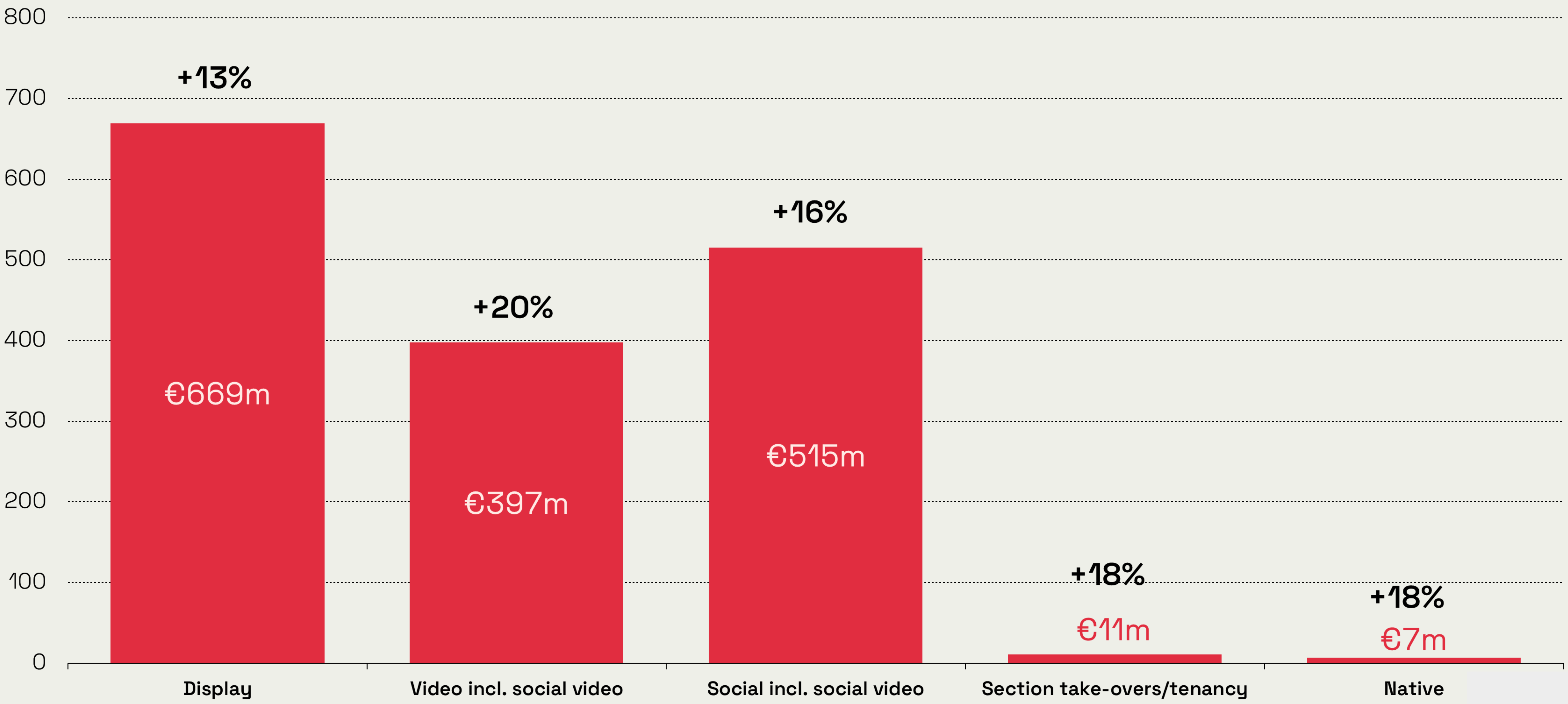
This is more than last year (47%) and the most prominent worry in the market.

Regulation

42% of respondents have cited increasing digital regulations as a concern.

This is in line with last year and continues to be a challenge for the industry.

Growth in Digital Formats in 2024



Note: Formats are not all mutually exclusive, there is some overlap across specific formats, and therefore do not amount to the market total, All growth figures are cross platform, with figures and percentages rounded, 1) Display includes paid social, native, video, email, embedded / interruptive formats, email, digital audio and network-related advertising, 2) Paid Social includes social video, social native (in-feed) and social display, 3) Video includes publisher video and social video | Source: IAB Ireland Online Adspend Report 2024

Appendix 1: About IRM

- IRM (The Institute for Media and Advertising Statistics) is Scandinavia's leading authority on advertising investments.
- IRM was founded in 1984, with the task of providing net advertising data for the Swedish market. IRM is also the net advertising data partner in Norway (since 2006) and Denmark (since 2023).
- Initially a part of the University of Gothenburg, IRM became an independent, non-profit organization in 1992.
- In 2025, IRM partnered with IAB Ireland to provide the annual report on digital adspend in Ireland.

1984
Founded at Gothenburg University

1992
Independent, non-profit organization

1997
First figures for digital adspend

2006
Provider of Norwegian net adspend data

2015
First study on programmatic buying

2019
First study on podcasts

2023
Provider of Danish net adspend data

2025
Partnership with IAB Ireland for the digital advertising report

Appendix 2: Methodology

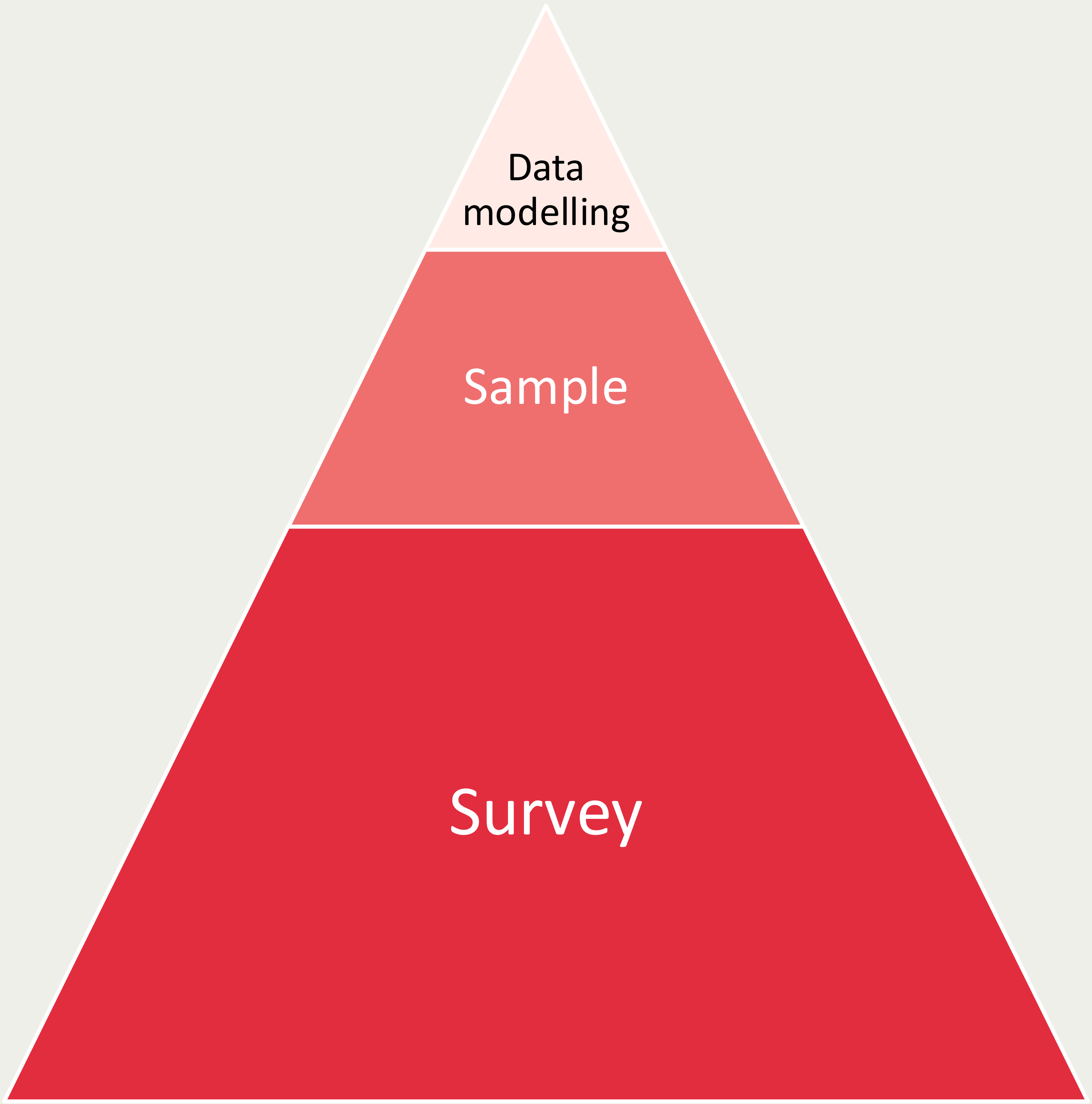
Since its inception IRM has used the survey method to compile and present net advertising data.

- **Total coverage:** When possible IRM compiles ad sales data from all firms that sell advertising space in a given channel via an online survey. The vast majority of the IRM information is gathered through the survey.

- **Sample:** In marketing channels where the market is too large or complex to compile data from all players, IRM use a representative sample to calculate total ad sales for the channel.

- **Data modelling:** When necessary IRM will build dedicated proprietary models to ensure reliable adspend data.

All data is provided to IRM on a confidential basis. Restatements may occur when new data is available.



Appendix 3: Participating Publishers

Acast
Irish Examiner
Carzone
News Ireland
Reach
sky media
distilled.
urbanmedia
onair online onstreet
FCR MEDIA
CarsIreland.ie
RTÉ
J MEDIA
BAUER MEDIA GROUP
RECRUIT IRELAND.COM
dmg::media
gradireland
IT THE IRISH TIMES
myhome
Virgin media
Digitize Digital Media Solutions
MEDIAHUIS
yahoo!
AudioOne

Appendix 3: Participating Ad Networks, Agencies and Platforms

SING! DO DIGITAL BETTER

WOLFGANG DIGITAL

Meta

Google

Digitize Digital Media Solutions

dentsu

TikTok

Pinterest

core

twitter

LinkedIn

groupm

HAVAS Media

OmnicomMediaGroup

The platform spend is based on IRMs proprietary econometric models.

Appendix 4: Definitions

Display

The "display" category is based on a combination of the media companies' invoiced revenue and estimates of the media and networks that do not participate in the survey.

Banners are defined as graphic, audiovisual, text-based and/or interactive advertising products that appear in connection with internet media (for example on a web page, on desktop, mobile or tablet). Banners consists of a subset of categories: standard display, email display ads & “other” and section takeovers / tenancy. Tenancy is a type of banner advertising in which the co-operation extends over a longer period of time.

Native advertising is defined as advertising that matches the form and function of the editorial material or platform upon which it appears. The content can be produced either by the media or the advertiser but is always paid for by an advertiser, published in an editorial environment and resembles the publication's editorial content. Native advertising in the context of this report is limited to native advertising in media and excludes social.

Non-social video includes instream video (video advertisements that play within video content), outstream video (video that plays outside of video content) and CTV (video on-demand delivered to an internet connected television set). Social video is not included.

Digital audio includes advertising revenues from podcasts, music streaming and online radio listening.

Social refer to digital platform services. Social video is included. Websites with blogs and similar content are not included. The spend in this category is based on IRMs proprietary econometric models for platform spend.

Classifieds

The category is based on a survey of actual invoiced revenues. The turnover pertains to the cost for the ad and not the commodity sold via the ad.

A classified online ad will typically be text-based, but can also be graphic, audiovisual and/or interactive in form.

Search

Search ads are graphic, audiovisual, text-based and/or interactive advertising products that appear based on a search made by the user.

Several search engines also offer display ads on other websites. This type of revenue is not included in the category "search" but in the category "banners".

The spend in this category is based on IRMs proprietary econometric models for platform spend.

For all categories in the report, the media in which the ads have been placed must be aimed at the Irish market.