



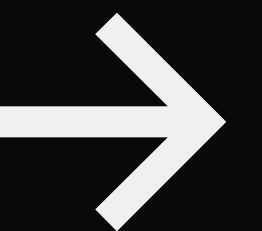
State of Advertising

Australia | H1 2025

The first half of 2025 has shown us an advertising landscape of **bold bets** made in a world of **fragmented audiences** and cautious consumers. To win in this new reality, advertisers must reach target audiences with **precision**.



Samba TV





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EXECUTIVE SUMMARY

For the first half of 2025, advertiser confidence and spend was up. Despite economic uncertainty, 87% of the top 100 advertisers increased their TV spend, seizing opportunities to capture market share. For example, Youi ad impressions surged dramatically (+215%) as part of its “Footy. Made by Fans” campaign, Mazda revived its “Zoom-Zoom” tagline (+136%), and McDonald’s maintained its position as the top advertiser with a modest year-over-year increase (+13%).

Divergent Strategies Emerge Across Advertisers

Brands in the same categories are taking starkly different approaches. ALDI increased ad impressions (+52%) to gain market share while Woolworths pulled back (-19%) to build out its retail media arm. RAM reduced spend (-69%) as it navigated a challenging market and concerns over the impact of new tariffs, while Skoda seized the opportunity to gain share-of-voice, increasing ads (+9,468%).

Necessities Take Priority

The shifts in ad impressions across verticals in H1 2025 paint a clear picture of advertisers reacting to the cautious consumer. Advertisers within non-discretionary categories like Insurance (+59%) and Pharmaceutical & Medical (+48%) saw some of the biggest increases in ad impressions, as consumers prioritise more fundamental life priorities.

Audience Precision Is Key

Half of TV households see 90% of ads, while the other half sees just 10%. This highlights a major efficiency gap in traditional TV advertising, where a huge portion of the budget is spent oversaturating one group while barely reaching the other. By combining TV data with contextual signals from the web, advertisers can reach the right audience and also better

understand who is in-market and ready to purchase. To succeed in the second half of 2025, marketers should:

- **Capture.** Reframe strategies around competitive share-of-voice, using our data to specify a narrow audience you can dominate.
- **Commit.** Leverage data to increase precision, but don’t be paralysed by competitors who are blowing their budgets on inefficient strategies.
- **Optimise your streaming strategy** and its enhanced targeting, reallocating budgets based on incrementality.
- **Embrace AI.** Stay ahead of the innovation, use actionable AI to discover non-obvious insights, optimise campaigns, and identify underserved, high-value audiences across channels.

We are here to be your partner at this pivotal moment for our industry,



Ashwin Navin
Samba TV Co-founder & CEO

87%

Almost all of the top 100 advertisers increased TV ad impressions year-over-year

+215%

Of the top 20 advertisers, Youi saw the steepest yearly increase in TV ad impressions

90%

Half of Australian households received 90% of all TV ad impressions

[ADVERTISING



REPORT]

[01]

Advertising Trends



HI 2025 ADVERTISING

87% of Top 100 Brands Increased TV Ad Impressions

Despite a backdrop of economic uncertainty and cautious consumer confidence, 87% of the top 100 and 85% of the top 20 advertisers increased their TV ad impression volume in HI 2025. This shows brands are doubling down on advertising to seize market share from competitors.

The most significant shifts came from Youi (+215%), which launched its “Footy. Made by Fans” campaign to become the #3 advertiser in Australia, up from #13 during the second half of 2024. Mazda also ramped up spend dramatically (+136%), reviving its “Zoom-Zoom” tagline across platforms.



Top TV advertisers in H1 2025

Total TV ad impressions

Percent change: H1 2025 vs. H1 2024

01	1.9B	06	1.1B	11	902M	16	699M
McDonald's	+13%	Woolworths 	-19%	KFC	+8%		-37%
02	1.7B	07	1.1B	12	836M	17	686M
Harvey Norman	+61%	<i>Cadbury</i>	+40%	Lite n'Easy	+23%		+136%
03	1.4B	08	982M	13	769M	18	640M
	+215%		+28%		+52%		+53%
04	1.4B	09	952M	14	721M	19	639M
	+17%	AAMI	+46%	Budget Direct	+62%	coles	-9%
05	1.4B	10	933M	15	710M	20	631M
 Australian Government	+23%	trivago	+129%	Trip a Deal	+72%	nickscali	+21%

*Excludes TV networks



GROCERY GIANTS PLACE OPPOSING BETS

ALDI Spends Big to Solidify Loyalty While Woolworths Pulls Back

In Australia's competitive grocery market, ALDI and Woolworths pursued starkly different advertising strategies in H1 2025. ALDI went on the offensive, boosting its TV ad impressions by 52% to continue its aggressive push for market share. This surge was driven by its long-running "Good Different" brand campaign, reinforcing its core message of high-quality products at the lowest possible prices.

In contrast, market leader Woolworths cut its TV impressions by 19% , shifting its focus toward building out its retail media arm, Cartology. This divergence reveals two opposing strategies: ALDI is spending heavily to reinforce its brand's unique value proposition, while Woolworths is betting on its established market position to reduce TV ad spend and instead build a sophisticated advertising ecosystem for its suppliers.

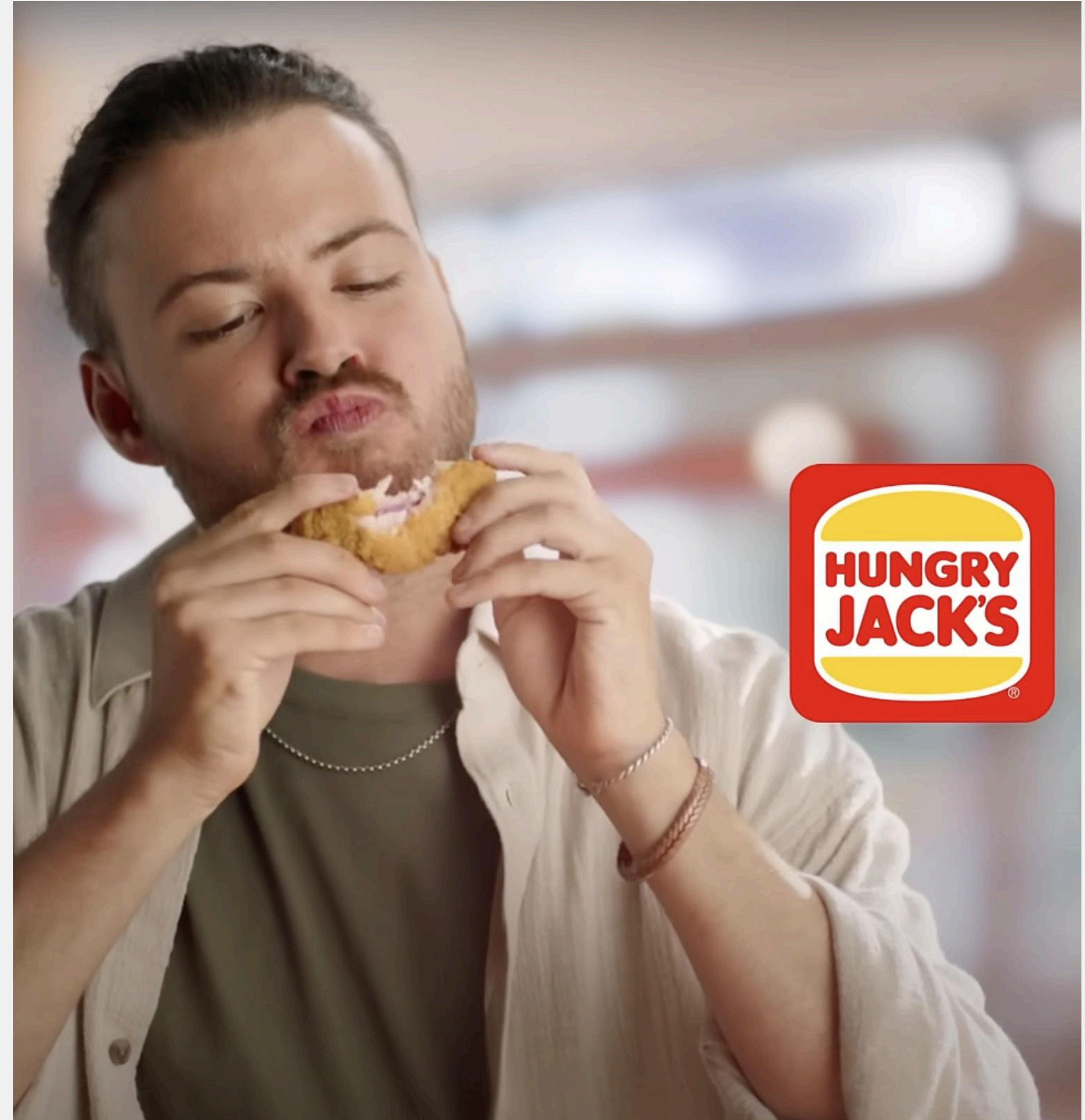


FROM IMPRESSIONS TO IMPACT

McDonald's, Cadbury, and Hungry Jack's Turned Ad Spend Into Meaningful Connections

In H1 2025, winning in advertising meant more than just high impression volume; it required earning positive online conversation and social sentiment. McDonald's stood out in balancing all three, with its nostalgia-driven "Squad Down Under" campaign that united iconic Birdie, Hamburglar, Officer Big Mac, and Grimace characters, ranking as the #1 advertiser based on TV and impressions and #4 based on online sentiment.

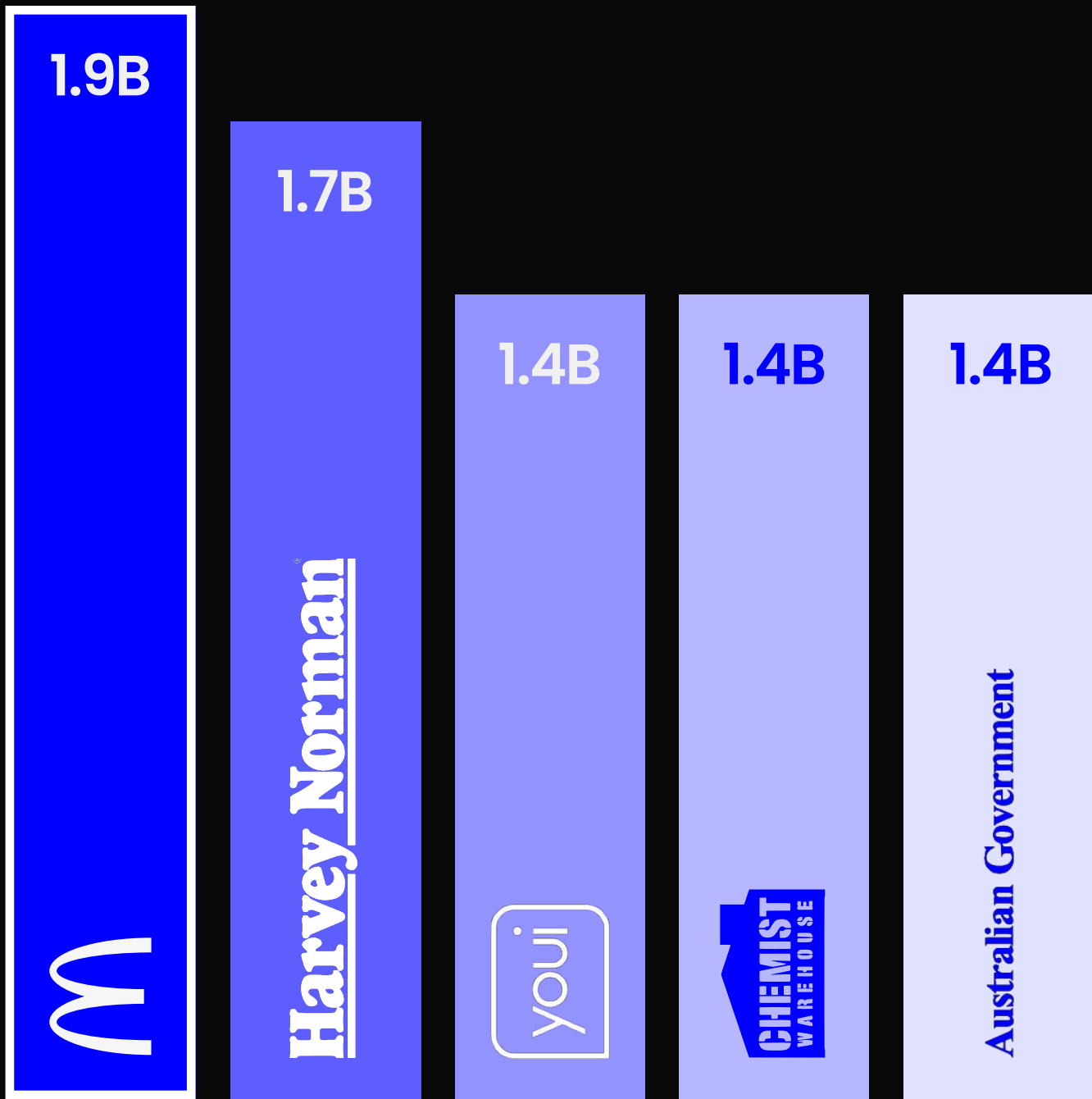
Cadbury and Hungry Jack's were also standouts from a sentiment perspective, each ranking within the top five based on both online and social sentiment. Cadbury saw a 40% year-over-year increase in TV ad impressions, driven by its global campaign celebrating the taste and texture of its chocolate. It also launched an emotionally resonant campaign titled "Memory."



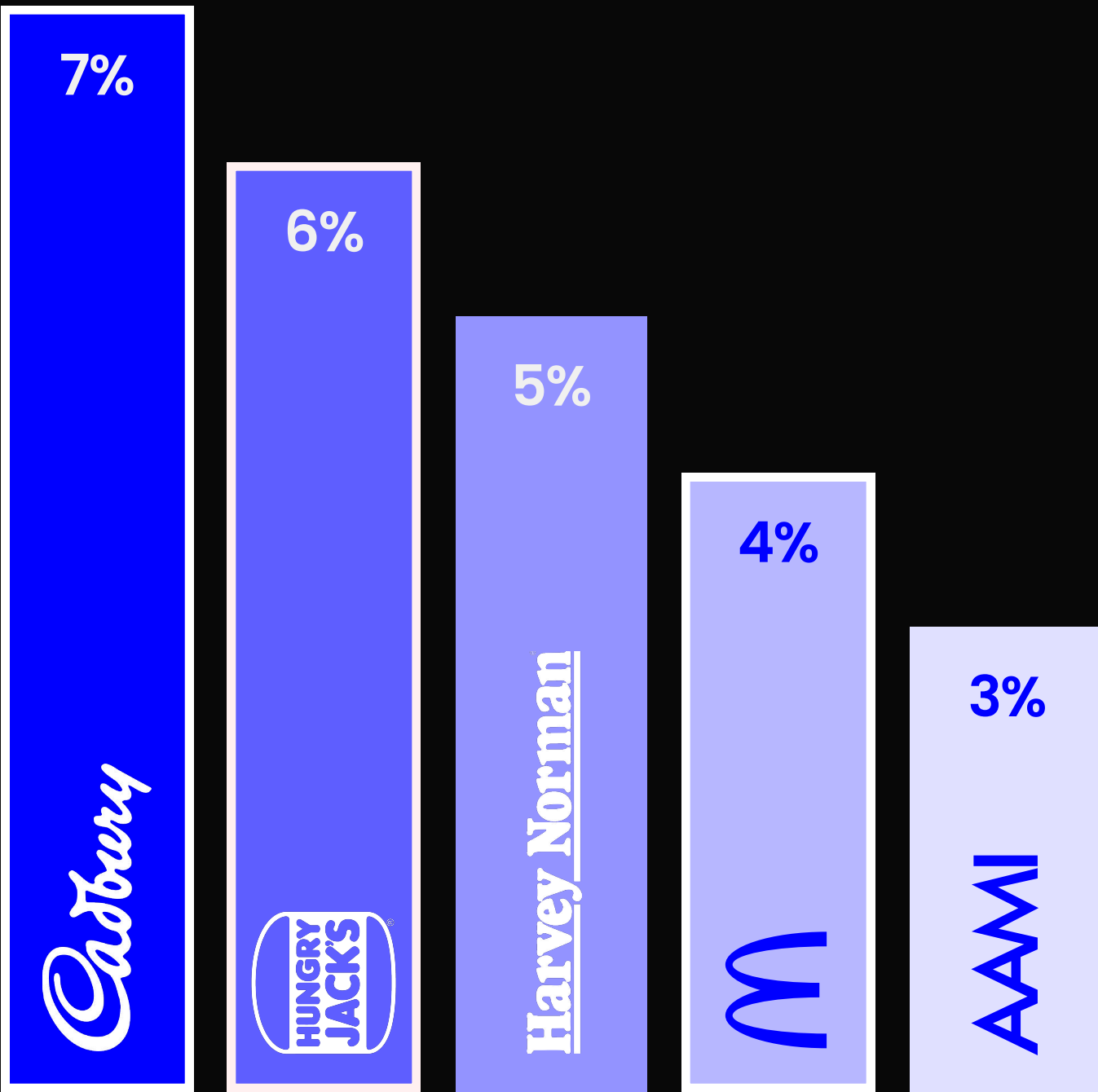
Winning brands by ad impressions, online conversation, and social sentiment

AMONG TOP 10 ADVERTISERS BASED ON TV AD IMPRESSIONS, H1 2025

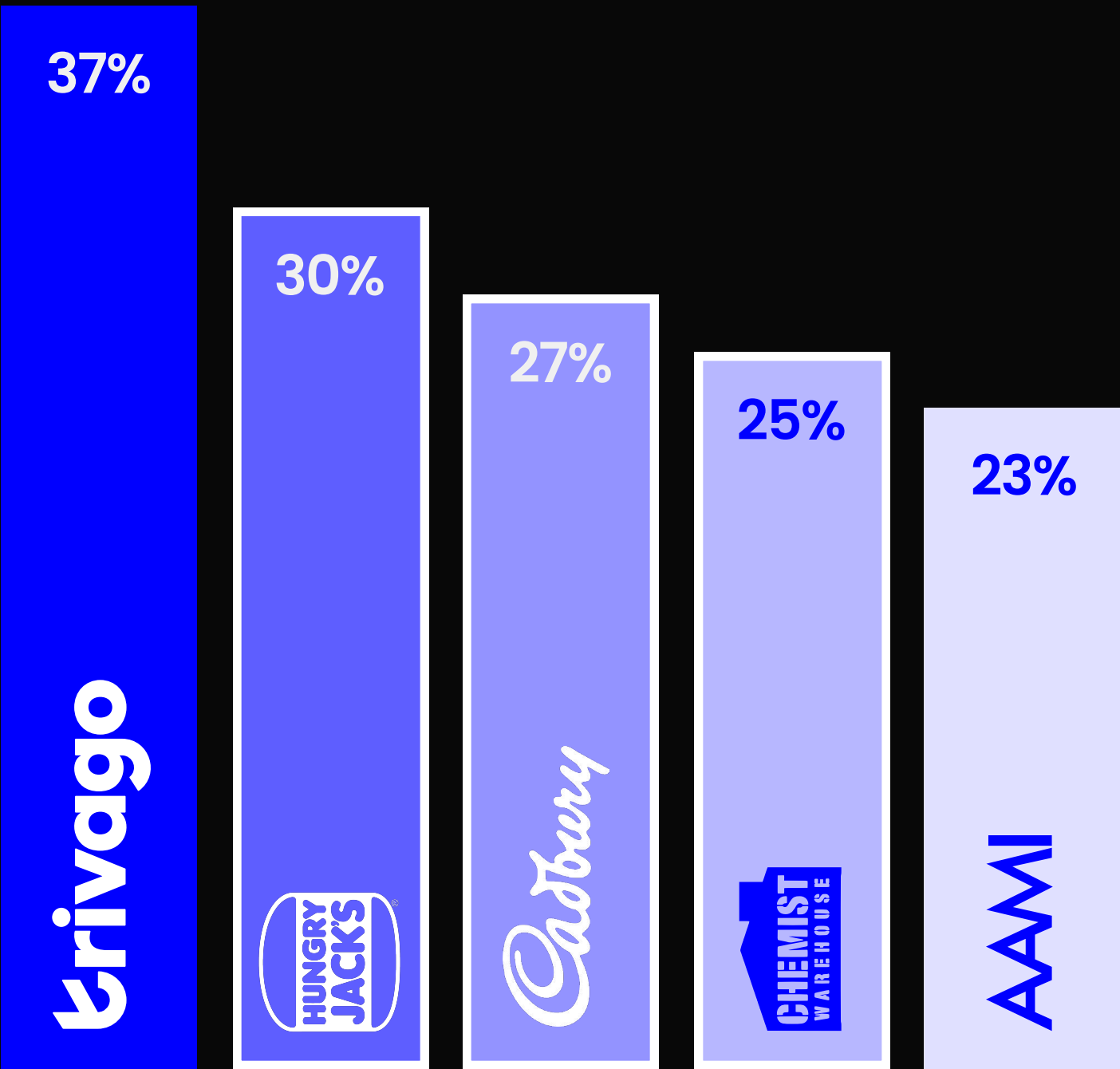
TV ad impressions



Positive online sentiment %



Positive social sentiment %



SOURCES: TV AD IMPRESSIONS AND ONLINE SENTIMENT, SAMBA TV. SOCIAL SENTIMENT, MELTWATER.



Cadbury, Hungry Jack’s, and Harvey Norman Drove the Most Positive Online Sentiment

During the first half of 2025, the brands generating the most positive conversation did so by highlighting their customer satisfaction and competitive advantage in powerful campaigns. For example, Cadbury’s “It could only be Cadbury Dairy Milk” campaign generated buzz around the unique flavour and texture of its products, sparking conversation from fans who prefer it to other chocolate brands.

Hungry Jack’s earned high sentiment by emphasising convenience and value. Its “Whopper Goal” and app-driven deals tied to its AFL sponsorship of the West Coast Eagles sparked positive conversation, along with its Wishmarker campaign in partnership with Make-A-Wish Australia.



Highest positive online sentiment among top 10 advertisers based on ad impressions

BRAND	POSITIVE SENTIMENT	NEGATIVE SENTIMENT	KEY POSITIVE THEMES
	7%	1%	• Customer enthusiasm and satisfaction • Unique releases like colour-changing chocolate bars and salted caramel flavours • Favorable comparisons to other chocolate brands
	6%	1%	• Solid promotions and deals • Good locations
	5%	1%	• Competitive pricing • Excellent customer service • Community involvement



Entertainment and Retail Dominate Share of Voice in TV Ad Impressions

The H1 2025 advertising landscape was overwhelmingly led by the Entertainment vertical, which commanded 25% of all ad impressions—almost double the next closest category. This immense spend highlights the high-stakes battle for viewership among broadcasters and their streaming counterparts, who are using their own airtime for self-promotion campaigns, aiming to engage and gain audiences in a fragmented media world. Following behind were the core pillars of consumer spending: Retail Stores (13%), Home & Garden (7%), and Food & Beverage (7%).

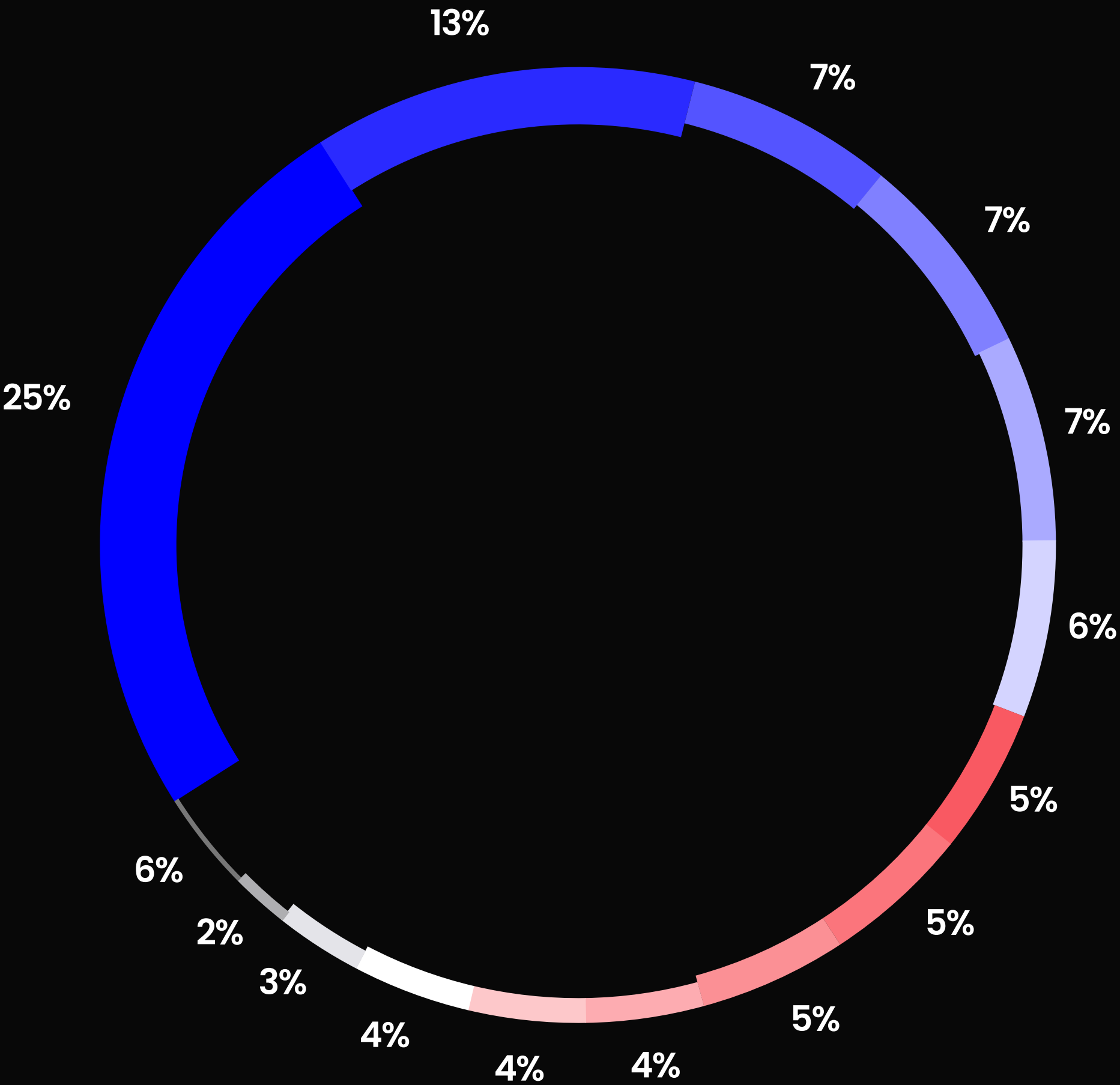
Notable increases in share of voice came from Business, Finance, Legal, and Logistics, which increased its share 6%, and Insurance, which was up 26%.



Total TV ad impressions by category

H1 2025

VERTICAL	IMPRESSIONS	PERCENTAGE
Entertainment	30B	25%
Retail Stores	16B	13%
Home & Garden	9B	7%
Food & Beverage	8B	7%
Business, Finance, Legal, and Logistics	8B	7%
Insurance	8B	6%
Vehicles Manufacturers	7B	5%
Government, Politics, and Social Concerns	6B	5%
Travel	6B	5%
Health & Beauty	5B	4%
Restaurants	5B	4%
Pharmaceutical	4B	4%
Electronics & Communication	3B	3%
Energy & Power	2B	2%
Other	7B	6%





Consumer Priorities Shift: A Focus on the Necessities Drives Insurance and Pharmaceutical Advertisers to Spend More

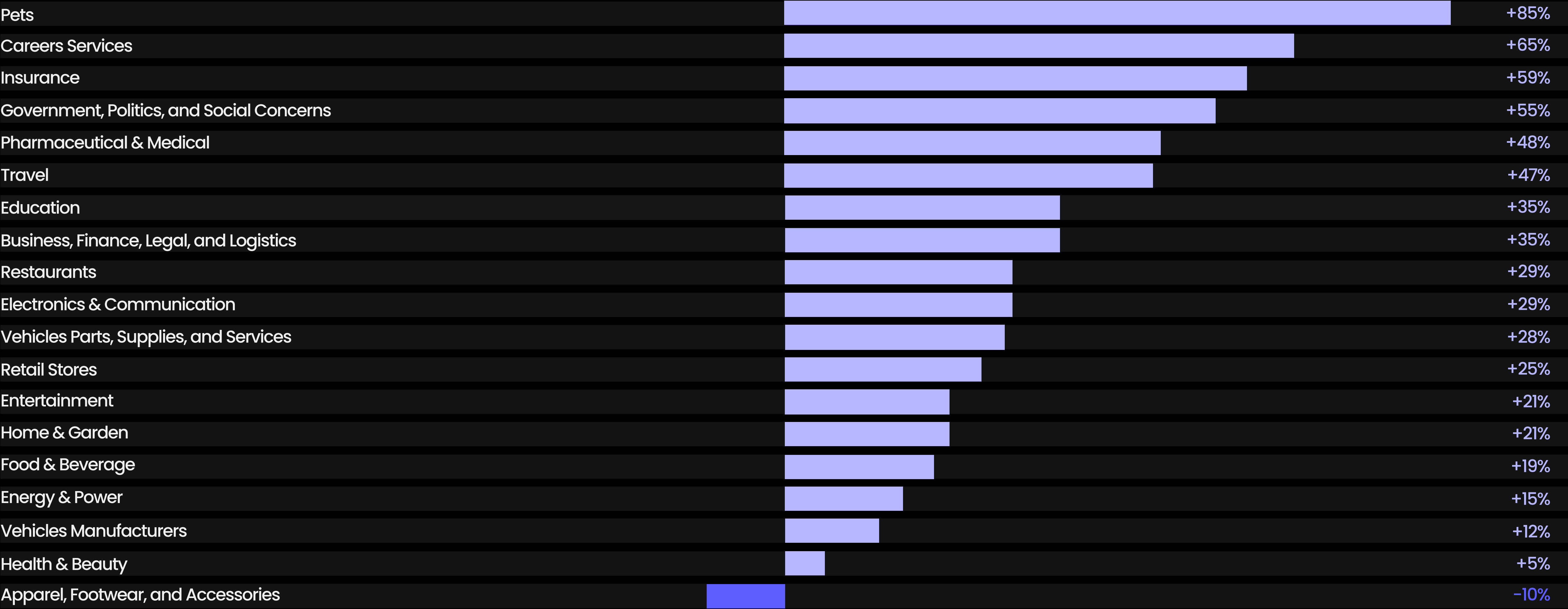
Almost every advertising vertical increased TV ad impressions during the first half of 2025, illustrating how intense the fight for market share is between brands. The categories that increased spend most significantly, however, were largely considered essential rather than discretionary, such as Insurance (+59%) and Pharmaceutical & Medical (+48%), as Australians focus more on the necessities.

Perhaps most telling is where advertisers see new growth opportunities: personal development. Ad impressions for Career Services (+65%) and Education (+35%) saw notable increases. In an uncertain economic climate, advertisers are clearly tapping into a consumer mindset that is more receptive to messages about investing in personal and professional futures.



Change in TV ad impressions by category

PERCENT CHANGE: H1 2025 VS H1 2024





Health & Beauty Brands See Biggest Ad Growth

Although the Health & Beauty category as a whole saw impressions increase by only 5% in the first half of 2025, several of the fastest growing brands came from that category. For example, La Roche-Posay, Gillette Venus, and Sensodyne all increased impressions by triple-digit margins.

The two advertisers that increased ad impressions the most, however, were automotive brand Skoda (+9,468%), which launched a major brand recovery with its emotional "Be More Elroq" campaign to reverse a sales slump, and the South Australia Tourism Commission (+4,654%), which used its "Celebrate the Simple Pleasures" campaign to create an authentic, arts-focused invitation to the state.

TOP 25 ADVERTISERS BASED ON YEAR-OVER-YEAR GROWTH IN TV AD IMPRESSIONS

AMONG TOP 500 ADVERTISERS

PERCENT CHANGE: H1 2025 VS H1 2024

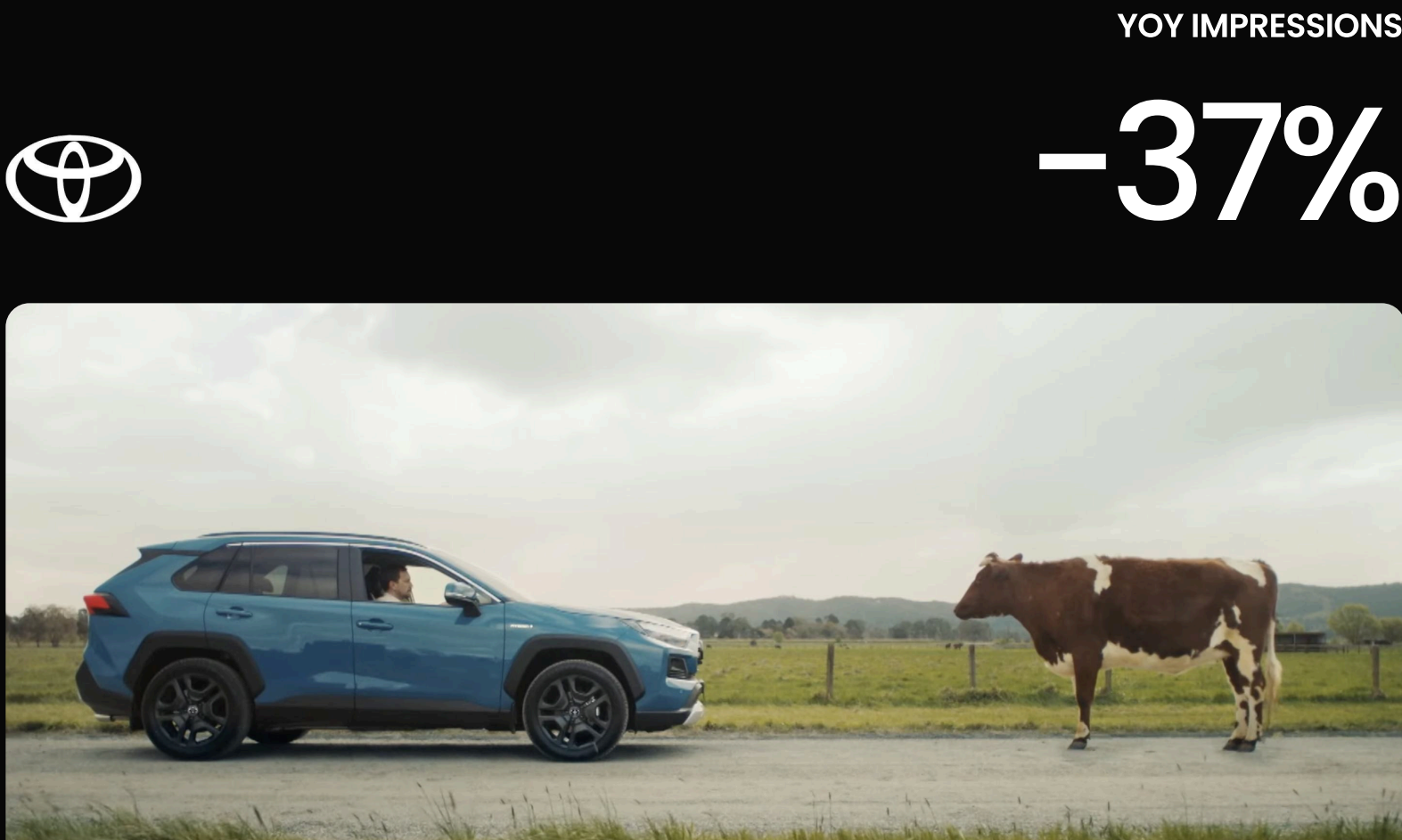
1	Skoda	9,468%
2	South Australia Tourism Commission	4,654%
3	Drive	4,517%
4	Bare Cremation	3,624%
5	Dairy Australia	2,336%
6	Reddy Express	817%
7	Lemsip	795%
8	Allianz	785%
9	Primo	747%
10	La Roche-Posay	675%
11	BYD Auto	672%
12	Aussie	510%
13	Fancy Feast	494%
14	ESPN	411%
15	Ostelin	405%
16	The Man Shake	390%
17	Gillette Venus	381%
18	Mahindra	379%
19	Felix Mobile	378%
20	Sove CPAP Clinic	348%
21	ESPN2	340%
22	Simparica	311%
23	Foxtel One	301%
24	TLC	300%
25	Sensodyne	295%



Automotive Brands Cut Ad Spending the Most

In a counter-narrative to the market's hyper-growth players, a group of established brands strategically scaled back their TV investment in H1 2025. This retreat was led by automotive brands like LDV (–78%) and market leader Toyota (–37%), as well as financial services like Wallet Wizard (–46%) and ClearScore (–43%).

This pullback highlights a profound strategic fragmentation, particularly within the auto sector. It suggests that while challengers are spending to build awareness, some incumbents believe their established brand equity allows them to reallocate TV funds to other channels without sacrificing significant market share.



BOTTOM 25 ADVERTISERS BASED ON YEAR-OVER-YEAR GROWTH IN TV AD IMPRESSIONS

AMONG TOP 500 ADVERTISERS

PERCENT CHANGE: H1 2025 VS H1 2024

1	LDV	–78%
2	RAM Trucks	–69%
3	Everyday Insurance	–57%
4	EnergyAustralia	–51%
5	Metamucil	–48%
6	BHP	–47%
7	Wallet Wizard	–46%
8	ClearScore	–43%
9	SsangYong	–41%
10	LocalAgentFinder	–41%
11	Emma	–41%
12	Olay	–40%
13	Priceline Pharmacy	–40%
14	Citi	–40%
15	Government of South Australia	–38%
16	smoothfm	–38%
17	Kellogg's	–38%
18	Toyota	–37%
19	Independent Grocers of Australia (IGA)	–36%
20	Victoria State Government	–35%
21	Lexus	–34%
22	eHarmony	–34%
23	Oral-B	–33%
24	Arnott's	–33%
25	Audible	–32%



Automotive Shake-Up: RAM Trucks Hits the Brakes While Skoda Accelerates

In a market shaped by cautious consumer spending, European value brand Skoda and American niche utility brand RAM Trucks took opposite paths. Skoda launched an all-out TV offensive to capture value-conscious buyers, boosting impressions by over 9,468%. In contrast, RAM Trucks pulled back from the broadcast airwaves, cutting its presence by 69% .

This divergence reflects two distinct reactions to a sluggish economy. Skoda's massive spend is a response to a market defined by high living costs, betting that a strong value message ("European manufacturing," "sharp pricing") can win over budget-conscious buyers. RAM's pullback suggests the opposite calculation.





AD OVERLOAD

TV Ads Are Oversaturated
For Many Consumers.
90% of Ads Go to Only
50% of Households

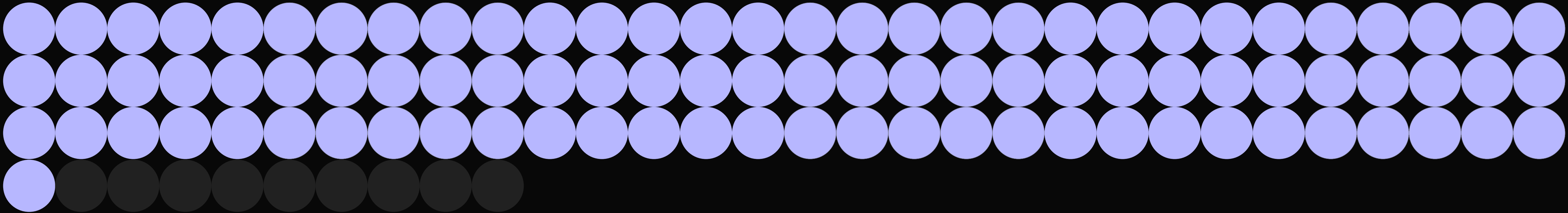
The distribution of TV advertising remains heavily imbalanced, creating a significant challenge and opportunity for brands. During the first half of 2025, the top 50% of linear TV households were bombarded with an average of 116 ads per day, accounting for a staggering 90% of all TV ad impressions. This extreme over-exposure creates ad fatigue and creative burnout, diminishing the impact of campaign spending.

Conversely, the bottom 50% of households (a significant and largely untapped audience) saw just 13 ads per day. This highlights a major efficiency gap and missed opportunity to reach valuable audiences.



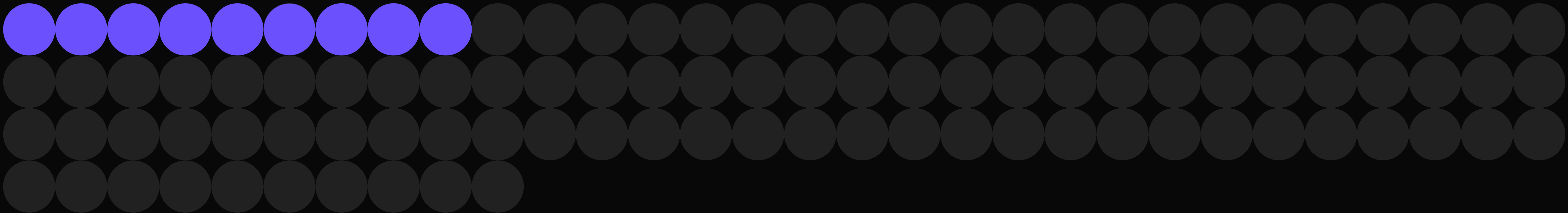
90% of TV ad impressions reached the top 50% of linear TV households

116 Average number of TV ads seen per day by the top 50% of linear TV households



10% of TV ad impressions reached the bottom 50% of linear TV households

13 Average number of TV ads seen per day by the top 50% of linear TV households





KEY TAKEAWAYS ON ADVERTISING TRENDS

Investing Through Uncertainty

The vast majority of top advertisers increased TV ad impressions to win market share in a slow-growth economy.

Broadcasters Drive Viewers to Streaming

Broadcasters are strategically using valuable primetime ad slots to funnel their massive linear audience directly to their own streaming services.

Earning Sentiment

Winning online conversation doesn't always require the highest ad spend. Brands like Cadbury and Hungry Jack's earned top sentiment through campaigns focused on efficacy and community goodwill.

Ad Overload

TV ad delivery is incredibly imbalanced. The top 50% of TV households see 90% of all ad impressions, while the bottom 50% see just 9%.

Insurance and Pharma Increase Ads

As consumers prioritise life essentials, advertisers within categories like insurance and pharmaceutical upped spend dramatically.





HOW SAMBA CAN HELP

Connect TV Attention and Online Attention

Driving consideration is critical. By understanding what your audience is watching on TV and where they are spending time online, Samba TV can activate campaigns that help you nurture users at precise moments of the marketing funnel. Customers who are stuck mid-funnel are killing your bottom line.

Conquest New Audiences

Identify households exposed to competitor ads, allowing you to run highly effective and targeted conquering campaigns to drive growth.

Get Competitive Intelligence

Use clear, actionable intelligence on competitor spend across viewership and behavioural signals enabling you to implement smarter offensive and defensive ad strategies.

Target with Precision

Use Samba first-party viewership data to build custom audience segments (e.g., "at-home value seekers") for efficient and relevant targeting.

Invest in a Holistic Media Mix Across TV and Digital

Ensure your media mix is diversified, and measure what's working with Samba's True Reach and Frequency measurement solutions.

[ADVERTISING



REPORT]

[03]

Vertical Deep-Dives



AUTOMOTIVE SHAKE-UP

Toyota Eases Off as Challengers Hit the Accelerator

The Australian automotive ad market was a story of strategic divergence in H1 2025. Market leader Toyota dramatically cut its TV presence by 37%, yet still dominated the airwaves with over 1.1B impressions. This pullback was mirrored by other incumbents like Mitsubishi (-14%) and Hyundai (-13%), who also scaled back their TV investment.

In stark contrast, a wave of challengers hit the accelerator. Mazda seized the opportunity with a 136% surge, reviving its iconic and nostalgic "Zoom-Zoom" campaign to reconnect with the brand's core identity of driving joy. Nissan (+103%), KIA (+53%), and Subaru (+70%) also aggressively increased their spend.

The most explosive moves, however, came from new entrants and relaunching brands. European manufacturer Skoda (+9468%) launched its emotional "Be More Elroq" campaign as part of a major brand recovery, while Chinese electric vehicle maker BYD (+672%) used a significant TV budget to launch itself into the mainstream.



+12%
Automotive ads increased by
12% year-over-year

Top Automotive advertisers by ad impressions

H1 2025 VS. H1 2024

01	Toyota	-37%		699M
02	Mazda		+136%	686M
03	KIA		+53%	640M
04	Mitsubishi	-14%		578M
05	Nissan		+103%	446M
06	Ford		+18%	366M
07	Subaru		+70%	321M
08	Hyundai	-13%		320M
09	Isuzu UTE		+16%	297M
10	MG Motor	-2%		259M

GROWING BRANDS
TOP INCREASES AMONG INSURANCE BRANDS IN TOP
500 ADVERTISERS

SKODA

+9,468%



+672%



+147%



+136%

NISSAN

+103%



THE INSURANCE ARMS RACE

A Universal Surge in Ad Spend

+59%
Insurance ads increased by
59% year-over-year

The Australian insurance sector was a hyper-competitive battleground in H1 2025, with every one of the top 10 advertisers increasing their TV ad impressions year-over-year. The charge was led by Youi, which cemented its position as the category's top spender by boosting its impressions by a massive 215%. There was also strong, sustained growth from established players like AAMI (+46%) and Budget Direct (+62%), indicating that brands are compelled to match competitors' spending to avoid being drowned out, driving up the cost of advertising for all participants and making creative cut-through more critical than ever.

The most dramatic moves came from brands executing aggressive growth strategies. Allianz launched its emotional "Care You Can Count On" campaign, fueling a massive 785% surge in impressions. It was joined by other high-growth players like Australian Seniors (+136%) and Suncorp (+107%), reinforcing the sector's universal commitment to using TV as the primary weapon for capturing market share.



Top Insurance advertisers by ad impressions

H1 2025 VS. H1 2024

01	youi		+215%	1.4B
02	AAMI		+46%	952M
03	Budget Direct		+62%	721M
04	Allianz		+785%	565M
05	Bupa		+9%	503M
06	Real Insurance		+20%	451M
07	HCF		+26%	388M
08	Australian Seniors		+136%	381M
09	Suncorp		+107%	379M
10	Medibank		+18%	235M

GROWING BRANDS
TOP INCREASES AMONG INSURANCE BRANDS IN TOP
500 ADVERTISERS

Allianz

+785%

youi

+215%

RAA

+168%

AUSTRALIAN
Seniors

+136%

GMHBa

+123%



RETAIL'S GREAT DIVIDE

Specialised Retailers Double Down as Supermarkets Diverge

Australia's retail advertising landscape is a tale of two strategies, with giants Harvey Norman (+61%) and Bunnings (+50%) leading a charge of specialty retailers who are aggressively increasing their TV investment. This group, including Officeworks (+59%) and Anaconda (+72%), is doubling down on television's mass reach to drive sales and reinforce their market positions.

This surge stands in stark contrast to the country's two largest supermarkets, Woolworths (-19%) and Coles (-9%), which both significantly reduced their TV presence. This retreat has been capitalised on by challenger ALDI (+52%), while the most dramatic growth comes from digitally native brands like Temple & Webster (+217%) and Amazon Prime (+202%), who are turning to traditional TV to build mainstream brand awareness.

+25%

Retail ads increased by 25% year-over-year



Top Retail advertisers by ad impressions

H1 2025 VS. H1 2024

01	Harvey Norman			+61%	1.7B
02	Chemist Warehouse		17%		1.4B
03	Woolworths	-19%			1.1B
04	ALDI			+52%	768M
05	Coles	-9%			639M
06	Nick Scali		+21%		631M
07	Bunnings Warehouse			+50%	602M
08	Officeworks			+59%	548M
09	Anaconda			+72%	538M
10	Spotlight			+62%	534M

GROWING CHANNELS
TOP INCREASES AMONG RETAIL BRANDS IN TOP
500 ADVERTISERS



+817%



+275%

Harris Scarfe

+233%

TEMPLE & WEBSTER

+217%

prime

+202%



THE BATTLE FOR THE BOOKING

Travel Sector Sees Explosive Growth

+47%

Travel ad impressions increased by 47% year-over-year

Australia's travel advertising sector roared back to life in H1 2025, with price comparison sites leading an aggressive push to capture the post-pandemic travel boom. Trivago became the category's top advertiser, boosting its impressions by 129%, while rivals Booking.com (+126%) and Stayz (+118%) also more than doubled their TV presence. This signals a clear strategy to own the customer relationship by being the first point of contact for booking.

This prompted a massive counter-investment from direct providers and destinations. National carrier Qantas tripled its TV spend with a 200% increase to encourage direct bookings, while the most dramatic move came from the South Australian government, which launched a breakout "Celebrate the Simple Pleasures" campaign, increasing its impressions by 4,654% to drive tourism to the state.



Top Travel advertisers by ad impressions

H1 2025 VS. H1 2024

01	Trivago		+129%	933M
02	TripADeal		+72%	710M
03	Qantas		+200%	381M
04	NSW Government	-8%		295M
05	Scenic		+77%	281M
06	Queensland Government		+39%	278M
07	Viking		+33%	274M
08	Government of Western Australia		+21%	274M
09	Booking.com		+126%	234M
10	Stayz		+118%	219M

GROWING BRANDS
TOP INCREASES AMONG TRAVEL BRANDS IN TOP
500 ADVERTISERS

SOUTH AUSTRALIA

+4,652%

QANTAS

+200%

TRAFALGAR

+161%

Trivago

+129%

Booking.com

+126%



FMCGS ON TV

Household Brands Vie for Share of Pantry

+19%

Food & Beverage ad impressions increased by 19% year-over-year in

The FMCG sector was a key battleground on Australian TV in H1 2025, with Cadbury leading an aggressive charge. Cadbury boosted its TV impressions by 40% to dominate the category, using a dual strategy of product-focused ads and emotional brand stories like its “Memory” campaign to build deep consumer connections.

This growth was echoed across the sector, particularly in the household cleaning aisle where Pine O Clean surged by 173% and Vanish grew by 84%. The battle for the dinner plate was also fierce, with meal solutions like Lite n' Easy (+23%) and HelloFresh (+91%) significantly increasing their presence, showing a clear focus on the convenience-seeking consumer.

The most dramatic moves came from challenger food brands making a major play for consumer attention. Smallgoods brand Primo executed a massive TV push with a 747% increase in impressions, alongside huge triple-digit growth from snack brand CC's (+158%) and dairy staple Bega (+147%).

+21%

Home & Garden ad impressions increase by 21% year-over-year



Top FMCG advertisers by ad impressions

H1 2025 VS. H1 2024

01	Cadbury		+40%	1.1B
02	Lite n' Easy		+23%	836M
03	Finish	-7%		612M
04	Vanish		+84%	563M
05	Pine O Cleen		+173%	490M
06	Sanitarium		+40%	391M
07	Botanica by Air Wick		+17%	366M
08	HelloFresh		+91%	351M
09	Dettol		+51%	273M
10	Bref		+111%	272M

GROWING BRANDS TOP INCREASES AMONG FMCG BRANDS IN TOP 500 ADVERTISERS

PRIMO	+747%
PINE CLEEN	+173%
CC's	+158%
Bega GROUP	+147%
AUSTRALIAN Pork	+145%



THE STREAMING SCRAMBLE

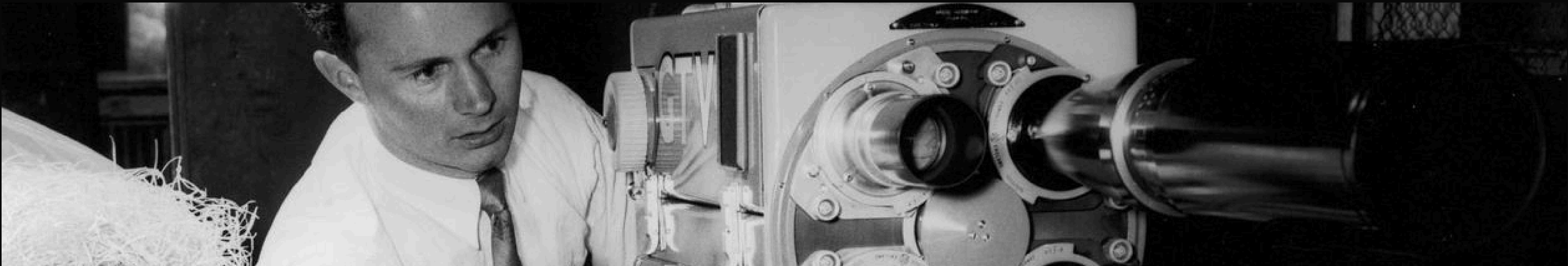
Broadcasters Battle for Digital Dominance

+21%
Entertainment ad impressions increased by 21% year-over-year

Australia's entertainment advertising landscape is dominated by the major free-to-air networks, with Channel 7, Channel 9, and Channel 10 collectively delivering over 11.5 billion impressions as they continue to heavily promote their own content. The traditional broadcasters all increased their year-over-year spend, using their massive reach to maintain audience share for their linear channels and news services.

However, the data reveals a massive strategic pivot toward streaming and on-demand platforms. The networks' own streaming services saw explosive growth, with 7plus surging by 91% and the Nine-owned Stan more than doubling its impressions by 102%. This shows a strong and clear strategy to capture audience attention with compelling content on their preferred platform.

This "streaming war" extends across the entire paid content landscape, with subscription channels making the most dramatic moves to capture viewer attention. Sports network ESPN (+411%) and pay-TV channel Foxtel One (+301%) led a wave of advertisers with triple-digit growth, highlighting the intense competition for subscribers in an increasingly fragmented media market.



Top Entertainment advertisers by ad impressions

H1 2025 VS. H1 2024

01	Channel 7		+9%	4.4B
02	Channel 9		+18%	4.4B
03	Channel 10		+23%	2.7B
04	Seven News		+59%	1.1B
05	SBS		+21%	763M
06	7plus		+91%	699M
07	9News		+72%	693M
08	ABC		+27%	660M
09	Stan		+102%	619M
10	7mate	-16%		459M

GROWING BRANDS
TOP INCREASES AMONG ENTERTAINMENT ADVERTISERS
IN TOP 500 ADVERTISERS

+411%

+340%

+301%

+300%

+221%



METHODOLOGY

Samba TV is a global leader in AI-driven media intelligence powered by first-party data from millions of opted-in connected televisions and billions of web signals across more than 50 countries. Our independent, cross-platform measurement provides advertisers and media companies a unified view of the entire consumer journey. Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV’s ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source.

As is standard industry practice, we analyse our large proprietary dataset to project household level TV viewership. We do not estimate viewership on non-TV devices, nor do we estimate co-viewing (number of people watching). We weight individual households in our dataset to create a research panel that we believe accurately represents viewership behaviours.

Samba TV does not estimate viewership on non-TV devices such as mobile phones. Samba TV measures at the household level, and does not extrapolate to the individual viewer. In certain areas throughout the report Samba first-party data is supplemented with third-party sources, such as Meltwater for social sentiment data.



For more information about Samba TV and our viewership and advertising insights, visit [Samba.tv](https://samba.tv), where you can subscribe to Samba Insights or schedule a meeting.