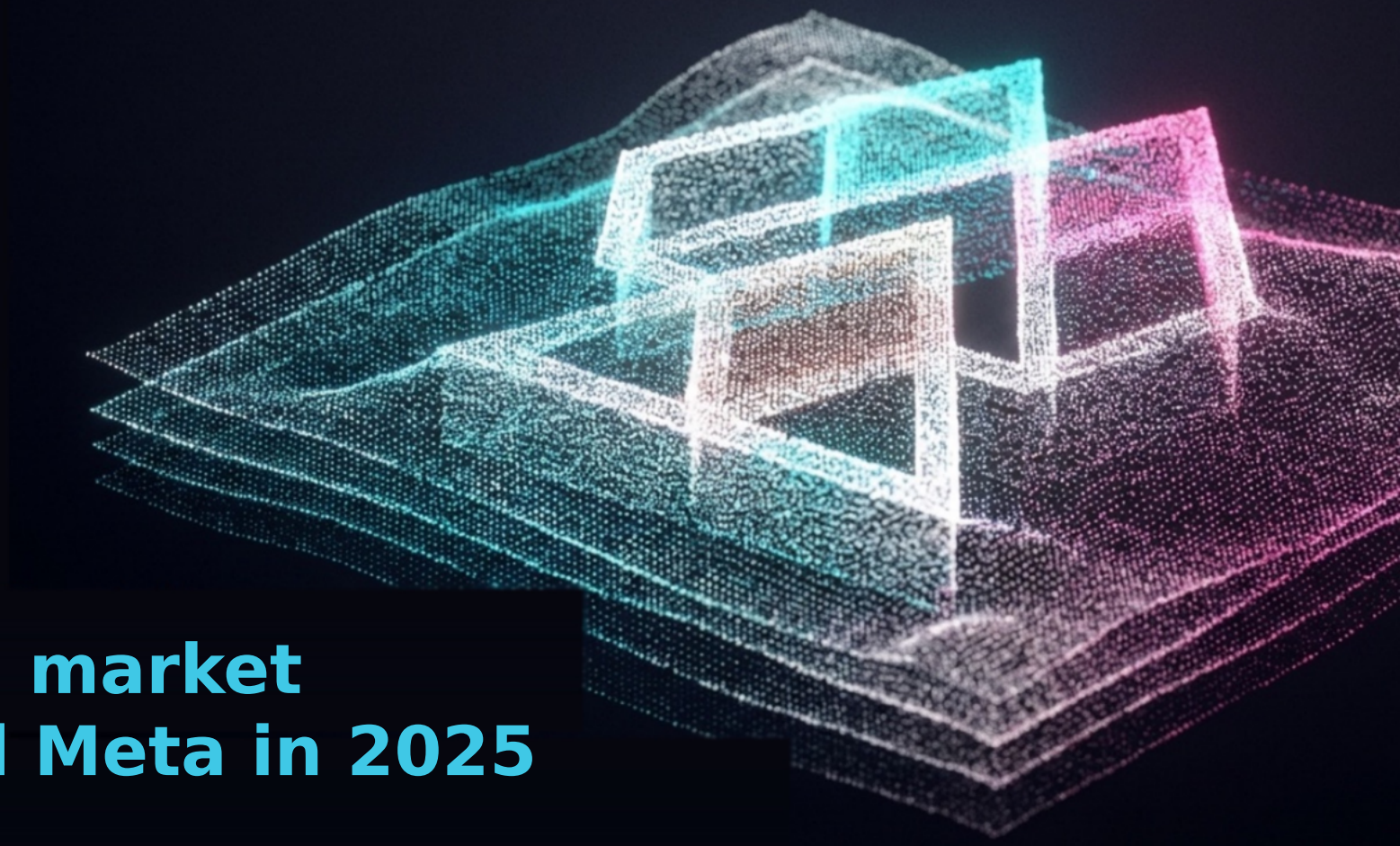
ZIRCON TREE



The Austrian digital market through Google and Meta in 2025

A look at real data from Google Ads Transparency Center and Meta Ad Library

ZIRCON TREE • 2025 in numbers

The digital advertising market via Google nearly doubled year-over-year

257,4 mld

impressions of ads active in 2025 (upper estimate)

+65 % year-over-year

201 798

active advertisers

+57 % year-over-year

3,13 mil

active ads

+73 % year-over-year

5+1

channels (Search, YouTube, Play, Maps, Shopping + Display and others in the remainder)

Tens of thousands of new advertisers turned Google advertising into an absolute standard in Austria, even for the smallest businesses. Local services, tradespeople and brick-and-mortar shops that once relied on recommendations or flyers have moved online at scale. Notably, the number of advertisers grew by 57 %, but the number of ads more than that — by 73 % — which means companies are producing many more creatives and variations than before. 2025 shows a saturated, highly automated market: launching an ad is easier than ever, but standing out among 3,1 million active ads takes real momentum and technological proficiency.

YouTube shot up by 163 % and is the fastest-growing channel

YouTube has taken over the role of the main growth engine. Impressions soared by 163 % year-over-year and the number of advertisers on YouTube rose from 46 472 to 83 961 (+81 %). Big players are massively increasing their video budgets and new advertisers are appearing in large numbers.

CHANNEL	2025	YoY
Search	120,77 mld	+28 %
Display & others*	68,40 mld	+108 %
YouTube	**57,03 mld**	**+163 %**
Maps	6,20 mld	+38 %
Play	3,94 mld	+114 %
Shopping	1,02 mld	+3 %

* Display and others — the remainder of total impressions after subtracting the measured channels. We assume GDN dominates here, but it also includes Gmail, Discover and other unattributed placements.

TOP 10 advertisers in 2025.
9 out of 10 are retail and e-commerce

KEY FINDINGS

- **9 of the top 10 are retail, e-commerce or marketplaces** — the only exception is telecom T-Mobile Austria (#6).
- **Temu enters straight at #1** (6,65 mld) — it was not in the 2024 top 20.
- Former leader **Amazon slipped to #2**, falling from 4,68 to 3,94 mld (−16 %).
- Austrian retailers climbed: **XXXLutz #5→#4** (+57 %), **Otto #6→#5** (+60 %), IKEA #10→#9.
- **OBI (2024 #7) and Hornbach (#9) dropped out** of the top 10.
- The top 3 delivered ~13,0 mld — about **5,1 % of all measured impressions**.

ADVERTISER	IMPRESSIONS	YoY
1. ELEMENTARY (Temu)	6,65 mld	**NEW**
2. Amazon	3,94 mld	**−16 %**
3. Fruugo	2,43 mld	**+13 %**
4. XXXLutz	1,97 mld	**+57 %**
5. Otto	1,93 mld	**+60 %**
6. T-Mobile Austria	1,61 mld	**NEW**
7. Thomann	1,39 mld	**+1 %**
8. Thalia	1,37 mld	**+8 %**
9. IKEA	1,31 mld	**+37 %**
10. Etsy	1,19 mld	**+8 %**

TOP 10 in Search.
Amazon still leads, but declines as Temu breaks in

KEY FINDINGS

- **Amazon stays #1** but declined from 4,03 to 3,30 mld (−18 %).
- **Temu breaks in at #2** (1,86 mld) — new to the ranking.
- **Otto surged #7→#4** (+70 %), XXXLutz held #3 while growing +55 %, and **H&M entered from #12**.
- **Thalia (2024 #9) and Hornbach (#10) dropped out** of the top 10.
- Search is **entirely retail and marketplace-driven** — all 10 are shopping advertisers.

ADVERTISER	SEARCH IMPRESSIONS	YoY
1. Amazon	3,30 mld	**−18 %**
2. ELEMENTARY (Temu)	1,86 mld	**NEW**
3. XXXLutz	1,65 mld	**+55 %**
4. Otto	1,64 mld	**+70 %**
5. Fruugo	1,44 mld	**+17 %**
6. IKEA	1,11 mld	**+24 %**
7. Etsy	1,09 mld	**+7 %**
8. OBI	1,04 mld	**+2 %**
9. Thomann	1,02 mld	**+0 %**
10. H&M	0,85 mld	**+46 %**

TOP 10 on YouTube.
Where FMCG brands and video budgets move in

KEY FINDINGS

- **Temu leads YouTube** (1,24 mld), entering as a new #1.
- YouTube is the only channel where classic FMCG brands appear — **Procter & Gamble and L'Oréal enter straight into the top 5**, both new.
- **Heavy churn — five of the 2024 top 10 dropped out** (incl. Thomann, Kaufland Marketplace, Shop-Apotheke).
- **Vinted jumped #12→#8** (+77 %); four of the top 10 are new entrants (Temu, P&G, L'Oréal, MJAM).

ADVERTISER	YOUTUBE IMPRESSIONS	YoY
1. ELEMENTARY (Temu)	1,24 mld	**NEW**
2. Fruugo	0,67 mld	**+11 %**
3. Thalia	0,60 mld	**+8 %**
4. Procter & Gamble	0,49 mld	**NEW**
5. L'Oréal	0,42 mld	**NEW**
6. JOYTUNES	0,33 mld	**+37 %**
7. MJAM	0,30 mld	**NEW**
8. Vinted	0,29 mld	**+77 %**
9. Etsy	0,26 mld	**+3 %**
10. eBay	0,26 mld	**+23 %**

The most significant players in Display. Temu dominates the largest hidden segment

KEY FINDINGS

- **Display & others is the second-largest segment** at 68,4 mld (+108 %), roughly 27 % of all measured impressions.
- **Temu exploded from #16 (0,19 mld) to #1 (3,80 mld)**, +1907 % — far ahead of the field.
- Biggest local risers: **T-Mobile Austria #4→#2** (+304 %), **Hofer #11→#3** (+220 %), travel player **FMTG #19→#7**.
- Former leader **Adobe slipped #1→#4**; Thomann and bonprix dropped out of the top 10.

ADVERTISER	IMPRESSIONS	YoY
1. ELEMENTARY (Temu)	3,80 mld	**+1907 %**
2. T-Mobile Austria	1,50 mld	**+304 %**
3. Hofer	0,70 mld	**+220 %**
4. Adobe	0,70 mld	**+5 %**
5. Amazon	0,56 mld	**+0 %**
6. Österreichische Lotterien	0,56 mld	**+55 %**
7. FMTG (Falkensteiner)	0,48 mld	**+198 %**
8. go-e	0,43 mld	**+8 %**
9. Renault	0,42 mld	**NEW**
10. Fruugo	0,33 mld	**+2 %**

Digital advertising is democratizing
the number of active advertisers grew by almost 73 thousand

+73 015

advertisers year-over-year

from 128 783 (2024) to 201 798 (2025)
= year-over-year growth of +57 %

Advertisers with more than 10 000 impressions

69 254 → 109 993

Large and mid-sized advertisers who really invest in digital.

Advertisers with 10 000 impressions or fewer

59 529 → 91 805

Small businesses, local companies, individuals — the entry into digital is opening up.

The top 10 advertisers form the visible peak, but an equally important story is the long tail. In 2025 almost 73 thousand more advertisers were active via Google than in 2024. The barrier to entry is low — small businesses are gaining access to advertising once reserved for the big players.

The same brands on Meta: Amazon floods with ads, XXXLutz and IKEA win on reach

KEY FINDINGS

- Of the top 10 Google advertisers, **8 have an active Meta presence** — all run on both Facebook and Instagram.
- **Amazon is by far the most active by volume** — 5 501 ads in 2025, five times the next brand.
- But reach tells a different story: **XXXLutz (172 mil) and IKEA (152 mil)** far outreach Amazon (66 mil) — fewer, larger brand campaigns vs many small product ads.
- Magenta Telekom (ex-T-Mobile) is the **only non-retail brand** here — 480 ads, 49 mil reach.

ADVERTISER	ADS	CUM. REACH*	PLATFORMS
1. Amazon.de	5 501	66 mil	FB + IG
2. XXXLutz	1 071	172 mil	FB + IG
3. Thomann	943	9,7 mil	FB + IG
4. IKEA	835	152 mil	FB + IG
5. Magenta Telekom	480	49 mil	FB + IG
6. OTTO Österreich	424	29 mil	FB + IG
7. Thalia	192	8,3 mil	FB + IG
8. Etsy	69	8,2 mil	FB + IG

* Cumulative reach is the sum of the reach of individual ads, not unique people reached.

Methodology

DATA SOURCE	Google Ads Transparency Center and Meta Ad Library (publicly available APIs)
PERIOD	Calendar years 2024 and 2025 (Google); year 2025 (Meta)
GEOGRAPHY	Impressions / reach generated in the Austrian market
GOOGLE CHANNELS	Search, YouTube, Play, Maps, Shopping
DISPLAY AND OTHERS	The remainder of total impressions after subtracting the measured channels — we assume a dominant share of GDN, but it also includes other unattributed placements
RANKINGS WITHOUT AGENCIES	Media agencies (e.g. GroupM, Zircon Tree) are excluded from the advertiser rankings — they aggregate multiple end clients in a single account
METRICS	Number of impressions, advertisers, ads (Google) and number of ads + cumulative reach (Meta). No € estimates or calculations from rate cards.

ABOUT ZIRCON TREE

Zircon Tree is a Slovak company operating in digital advertising. We prepare this analysis with the aim of bringing a more transparent view of real digital advertising data to the Austrian market.

CONTACT

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What you need to know when reading the numbers

Our data is publicly available, but it has limitations that we acknowledge transparently.

Bucketing from the top

Google reports impressions in ranges (e.g. “more than 10M”). For such ads we use an upper estimate of 20M. Total impression figures are therefore upper estimates, not exact values. The year-over-year trends remain valid, because we make the same error in both 2024 and 2025.

Multi-year ad overlap

Ads active in 2025 may also have been running in 2024 or earlier — some run for as long as 3 years. Their impressions are counted in each year of activity. “Active in 2025” is therefore not the same as “launched in 2025”.

Display as the remainder

In the Transparency Center, Google does not list the Display Network as a separate channel. We calculate “Display and others” as the difference between total impressions and the measured channels. We assume the dominance of GDN, but it also includes Gmail, Discover and other placements.

Meta — sample and reach

For Meta we track only the brands from the Google rankings — this is not an independent ranking of all of Meta. Cumulative reach is the sum of the reach of individual ads, not unique people reached (who overlap between ads).