



DIGITAL LANDSCAPE REPORT

March 2024

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iab.
australia



WELCOME...

To the Ipsos iris and IAB Australia Digital Landscape Report.

This report is designed to provide IAB members and Ipsos iris subscribers with an overview of the Australian Digital Landscape with information about:

- How many people are accessing the internet
- How often they do so
- Who they are
- What they are doing
- What devices they are using to access different types of content
- Any interesting changes YOY

We will be evolving our reports over time, so feedback about what else you would like to see is welcome and we can be contacted at support-au@ipsosiris.com



CONTENTS

Snapshot of The Australian Online Population	4
YOY Comparison Australian Online Population - Snapshot	5
YOY Comparison Australian Online Population – Users and Frequency	6
DEVICE OWNERSHIP & USAGE	
Device Penetration	8
Device Overlap	9
Smartphone Ownership & Usage	10
Smartphone Ownership & Usage YOY Comparison	11
Tablet Ownership & Usage	13
Computer Ownership & Usage	14
Smart TV Ownership	15
Other Device Ownership	16

Other Device Ownership YOY comparison	17
Devices Used To Stream (Last 7 Days)	18
YOY Comparison Smartphone Free Online TV streaming	19

ONLINE MEDIA BEHAVIOUR

Average Time Streaming (Last 7 Days)	21
Average Time Streaming (Last 7 Days) YOY comparison	22
Online media consumption	23
Online media consumption by age	24
Paid streaming consumption YOY comparison	25

KEY TAKEOUTS

Key Takeouts	27,28
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SURVEY PROFILE

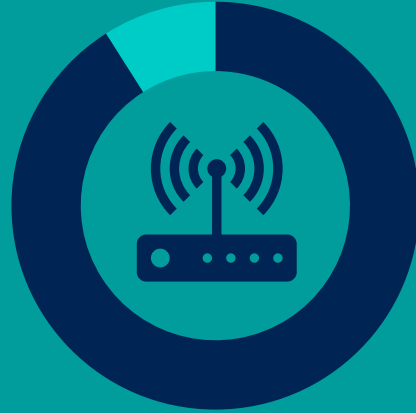
Demographic Profile	30
Methodology	31

SNAPSHOT OF THE AUSTRALIAN ONLINE POPULATION



21.61M

Australians aged 14+ are online each month



93%

Of the 14+ population were online yesterday



81%

Are online more than once or twice a day



About 1.4%

Of people 14+ have never been online

95.2%

Of people 14-34 years old were online yesterday



ACT

Has the highest online penetration of internet users with 96% online yesterday (14+)

THERE ARE 950,000 MORE AUSTRALIANS ONLINE IN 2024 VS. 2023

MAR-23



20.66M

Australians aged 14+ are online each month



MAR-24



21.61M

Australians aged 14+ are online each month



FREQUENCY OF ONLINE USAGE CONTINUES TO GROW & NON-USERS ARE DECLINING IN 2024 VS. 2023

MAR-23



93%

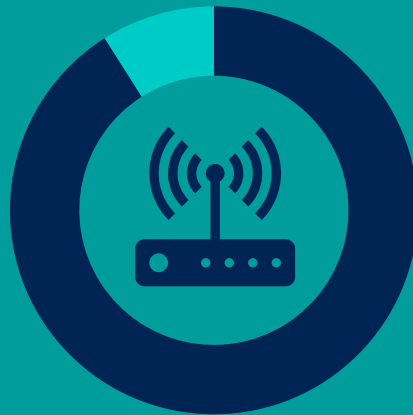
Of the 14+ population were online yesterday



78%

Are online more than once or twice a day

MAR-24



93%

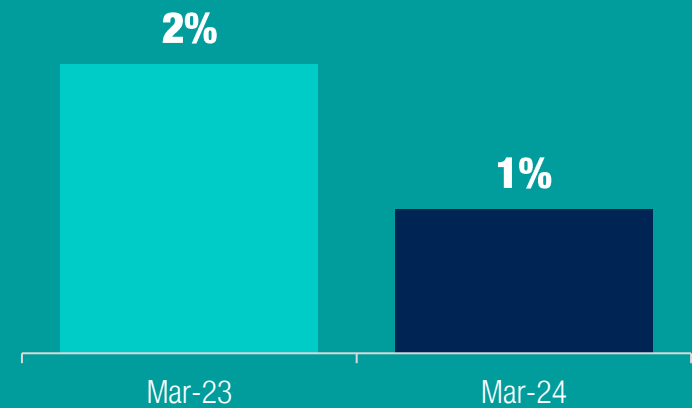
Of the 14+ population were online yesterday



81%

Are online more than once or twice a day

Non-Users



People 14+ who have never been online

DEVICE OWNERSHIP & USAGE

21.2M PEOPLE 14+ OWN A SMARTPHONE FOR PERSONAL USE, WHILE THERE ARE OVER 19M COMPUTERS AND 26M SMARTPHONES IN AUSTRALIAN HOUSEHOLDS

PERSONALLY USED DEVICES

NUMBER OF DEVICES



24.2M

Smartphones



11.8M

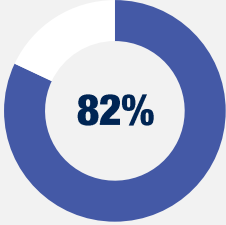
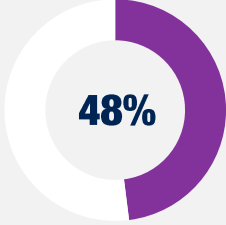
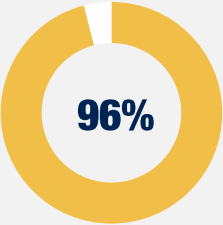
Tablets



23.8M

Computers

USE PENETRATION



DEVICES IN HOUSEHOLD

NUMBER OF DEVICES



26.6M

Smartphones



10.4M

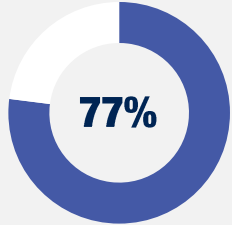
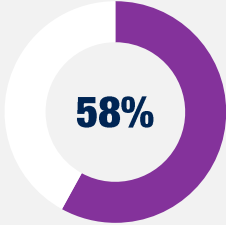
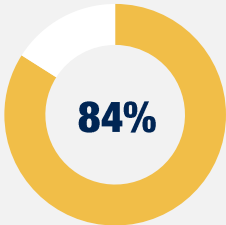
Tablets



19.5M

Computers

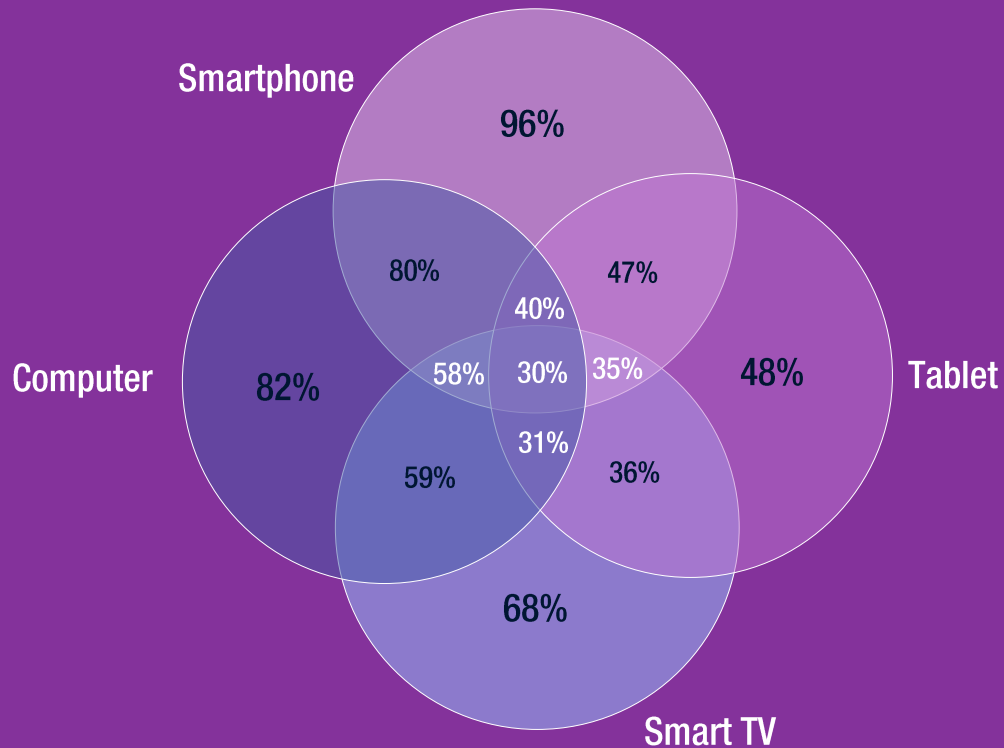
USE PENETRATION



SMART TVS ARE MOST LIKELY TO BE IN HOUSEHOLDS WHICH ARE USING BOTH SMARTPHONES AND COMPUTERS

DEVICE OVERLAP

Devices for Personal Use



30%

Of Australians own a smartphone, computer and tablet for personal use and also have a smart TV in their household

2.8

Average number of any personally used devices (excl. smart TV)

Devices include: Smartphones, Tablets and Computers

SMARTPHONE OWNERSHIP & USAGE

Apple dominates in Australia both for recency and operating system.

AVERAGE DEVICES

2.88



Average number of smartphones per household

1.12



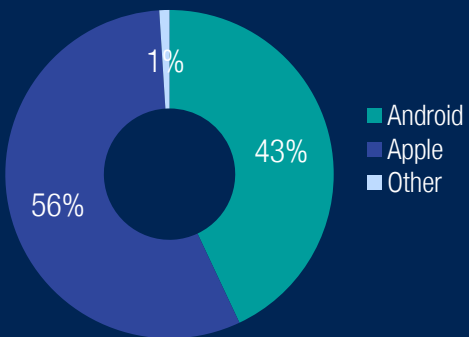
Average number of smartphones per person

1.21*



Average owned by an employer or educational institutional

OPERATING SYSTEM



USAGE



85% of 45-54 year olds used a work smartphone in the past day, vs. 77% of 25-34 year olds.

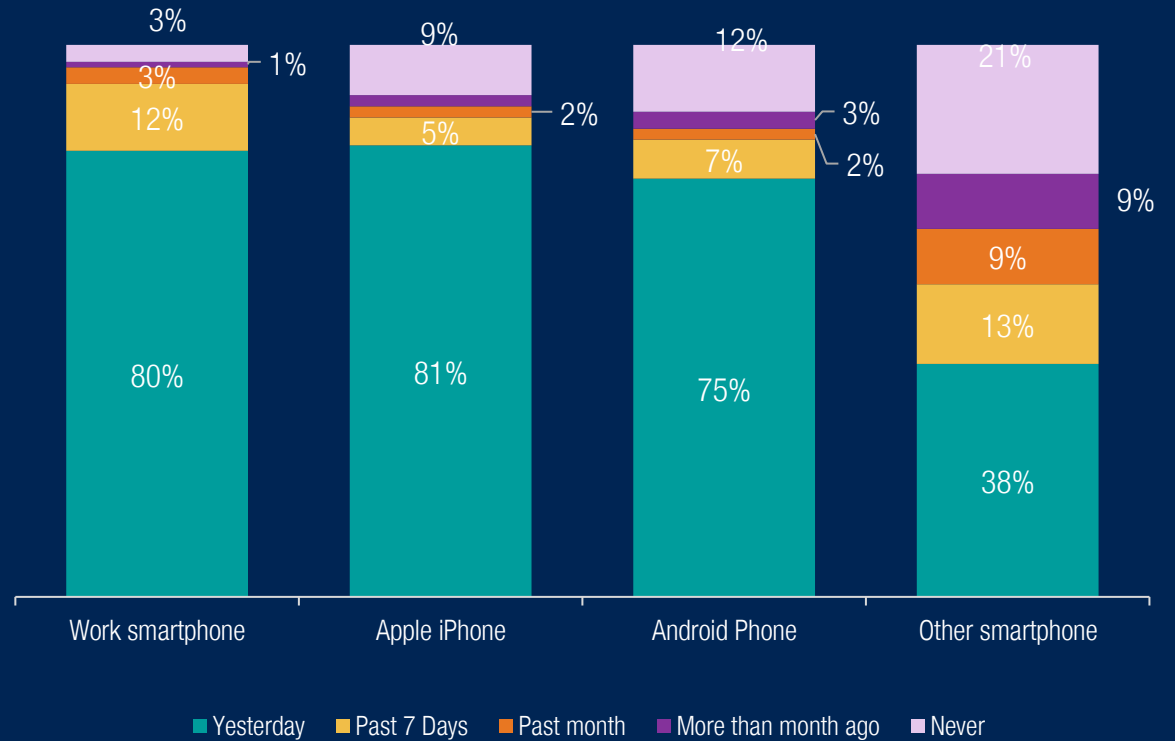


60% of Females own an Apple iPhone vs 53% of Males (Males have a stronger affinity for Androids vs. females).



Queenslanders have the highest average number of smartphones in the HH at 3.76.

DEVICE REGENCY



Source: Ipsos iris Establishment Survey, March 2024, N=12,810 P14+

*Filter; P14+ who are employed or studying.

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SMARTPHONE OWNERSHIP & USAGE 2024 VS. 2023


Apple still leads the pack in Australia but the 25+ aged demo has seen a sharp increase in Android usage

MAR-23


MAR-24

AVERAGE DEVICES


2.59

 Average number of smartphones per household

1.13


 Average number of smartphones per person

0.53*


 Average owned by an employer or educational institutional

AVERAGE DEVICES


2.88

 Average number of smartphones per household

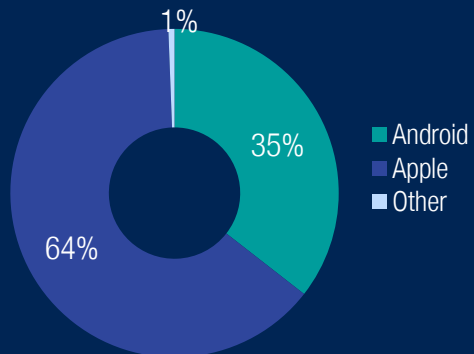
1.12

 Average number of smartphones per person

1.21*

 Average owned by an employer or educational institutional

OPERATING SYSTEM



USAGE

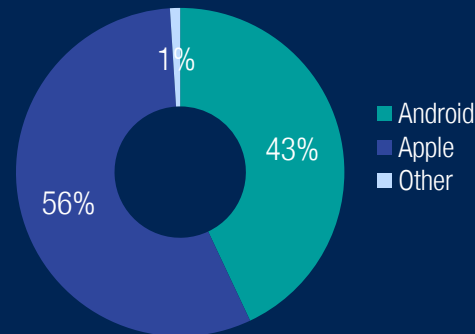


98% of P14-24 own a smartphone for personal use vs 87% of P65+ who own one.



71% of P14-24 own an Apple iPhone vs 59% of P65+

OPERATING SYSTEM



USAGE



98% of P14-24 own a smartphone for personal use vs 89% of P65+ who own one.



71% of P14-24 own an Apple iPhone vs 56% of P65+

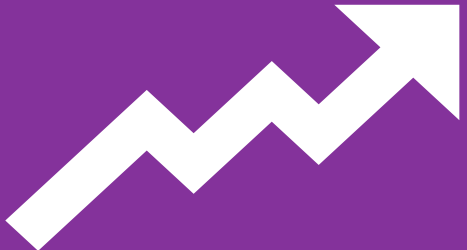
ANDROID SEES AN 8 PERCENTAGE POINT INCREASE IN USAGE YOY IN THE 25+ AGE DEMO, WHICH WAS STRONGLY DRIVEN BY THE 45-54 DEMO WITH A 15 PERCENTAGE POINT INCREASE

ANDROID SMARTPHONE USAGE

MAR-23

38%

Australians aged 25+



MAR-24

46%


Australians aged 25+

TABLET OWNERSHIP & USAGE


There are less tablets on average in each household than other devices.

AVERAGE DEVICES


1.13

 Average number of tablets per household

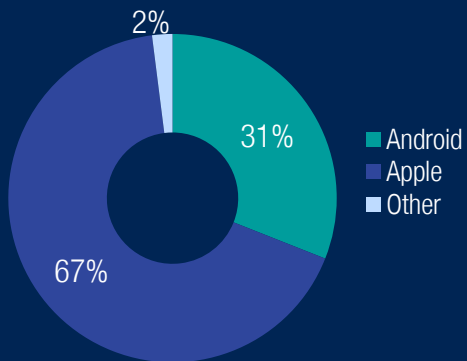
0.65

 Average number of tablets per person

0.23*

 Average owned by an employer or educational institutional

OPERATING SYSTEM



USAGE

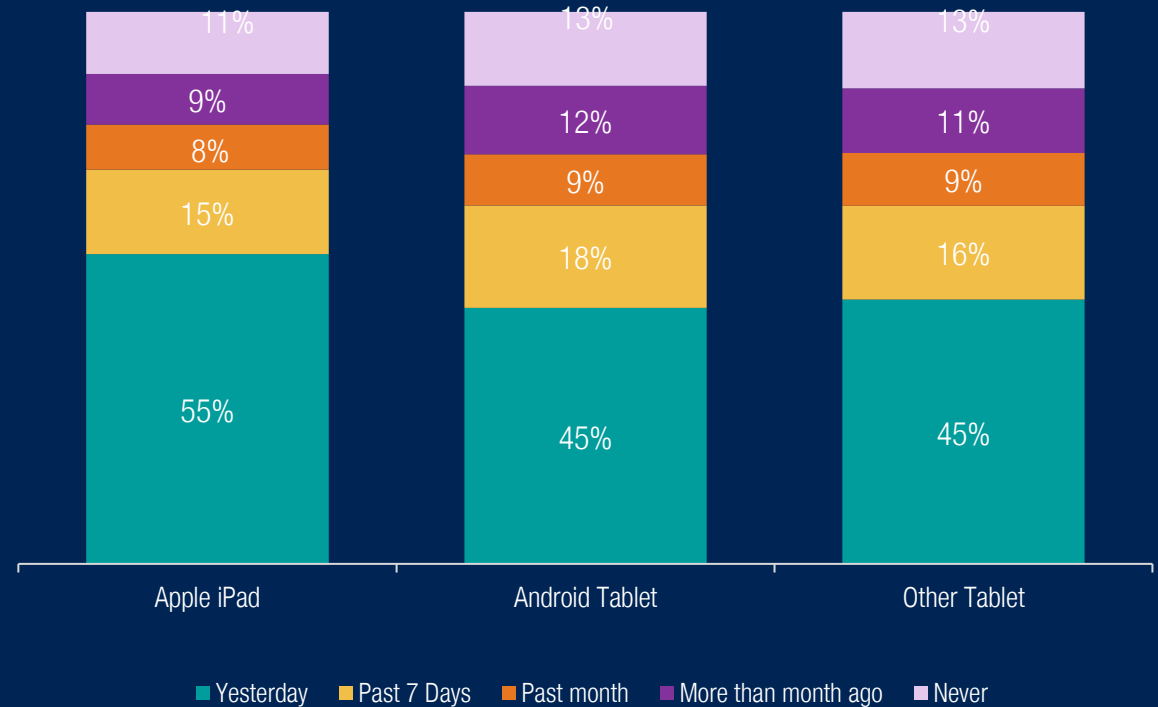


Tertiary educated Australians have a higher penetration of personal tablet ownership vs. their non-tertiary educated counterparts.



82% of 18-24 year olds most often use an Apple iPad, with 16% using an Android. In comparison, 38% of 45-54 year olds use an Android Tablet, which is more than double that of the 18-24 age group.

DEVICE REGENCY



Source: Ipsos iris Establishment Survey, March 2024, N=12,810 P14+

*Filter; P14+ who are employed or studying.

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COMPUTER OWNERSHIP & USAGE

Almost one in three use a computer that remains outside of the home.

AVERAGE DEVICES

2.11



Average number of computers per household

1.15



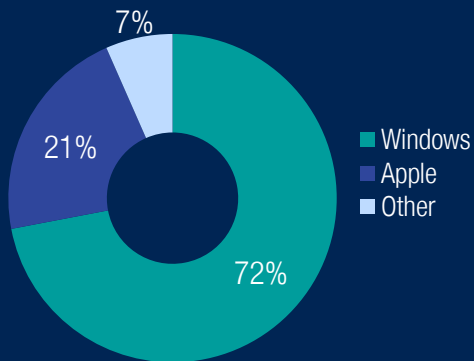
Average number of computers per person

0.60*



Average owned by an employer or educational institutional

OPERATING SYSTEM



USAGE

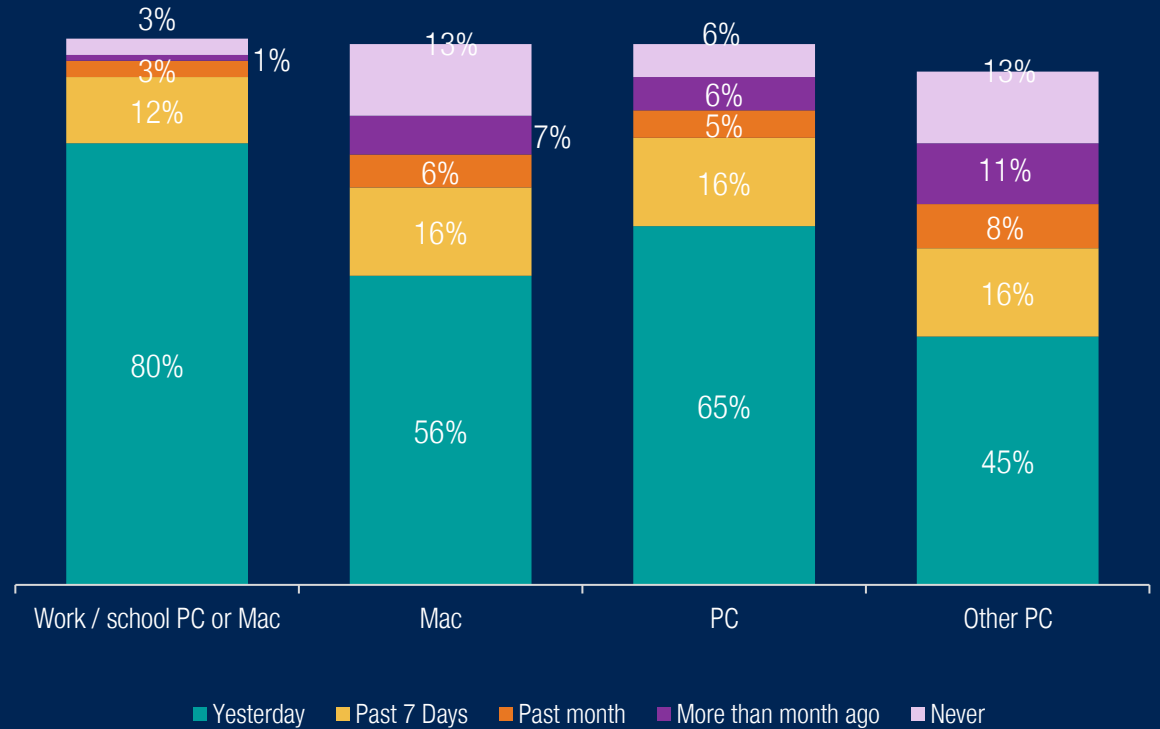


29.4% of online Australians use a computer that remains at their place of work or education (not in the home).



1 in 4 online Australians share their most used computer with others.

DEVICE REGENCY



78% OF ALL ONLINE AUSTRALIANS 14+ HAVE AT LEAST ONE SMART TV CONNECTED TO THE INTERNET IN THE HH, AND 1 IN 4 HAVE MULTIPLE SMART TV'S

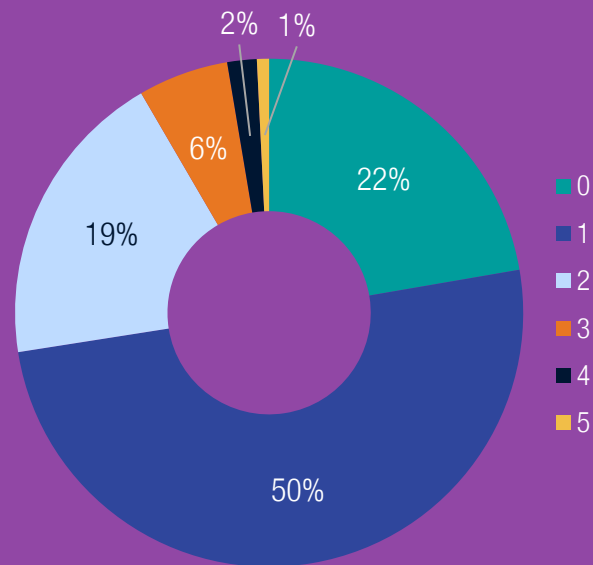
SMART TV OWNERSHIP

1.04

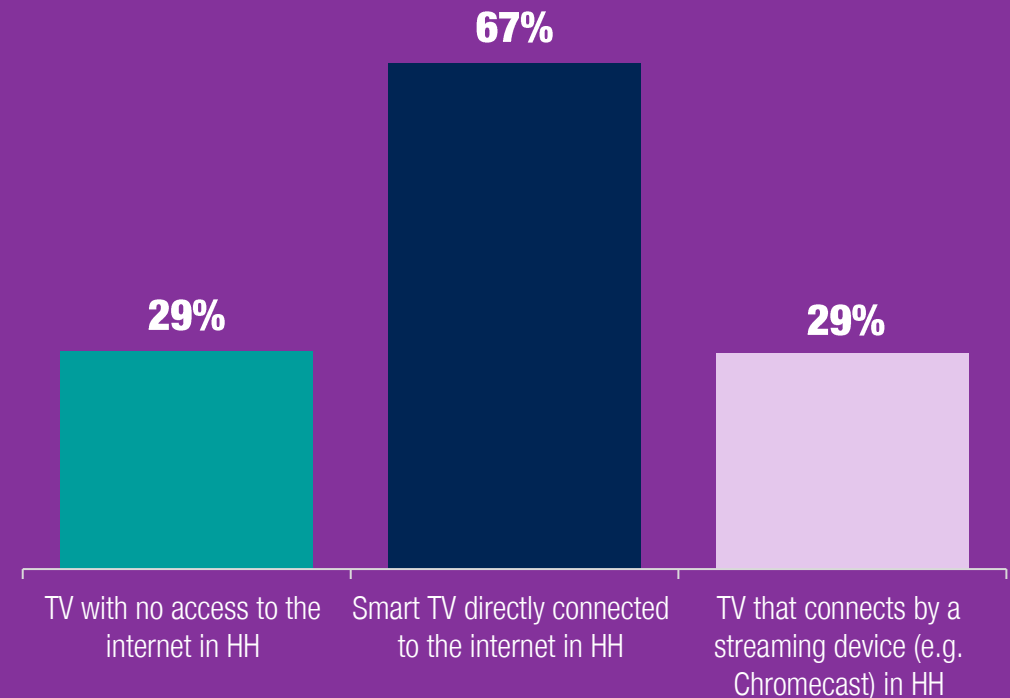
Average number of smart TVs per household*

28% of households have 2+ smart TVs in their home*

NUMBER OF SMART TV'S IN ONLINE HOUSEHOLDS

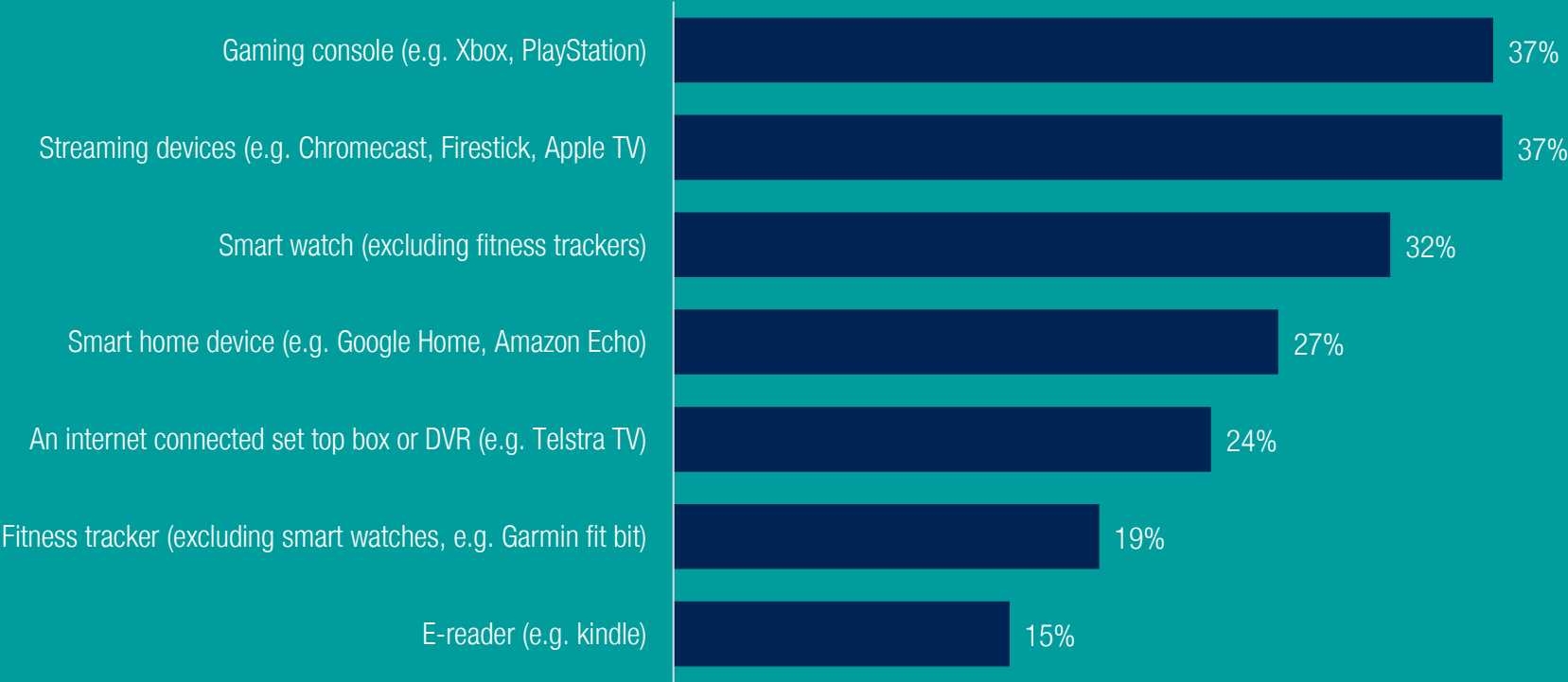


SMART TV OWNERSHIP TOTAL HOUSEHOLDS



OUTSIDE OF THE MAIN DEVICES GAMING CONSOLES AND STREAMING DEVICES ARE THE NEXT MOST COMMONLY OWNED

OTHER DEVICES IN HOUSEHOLD



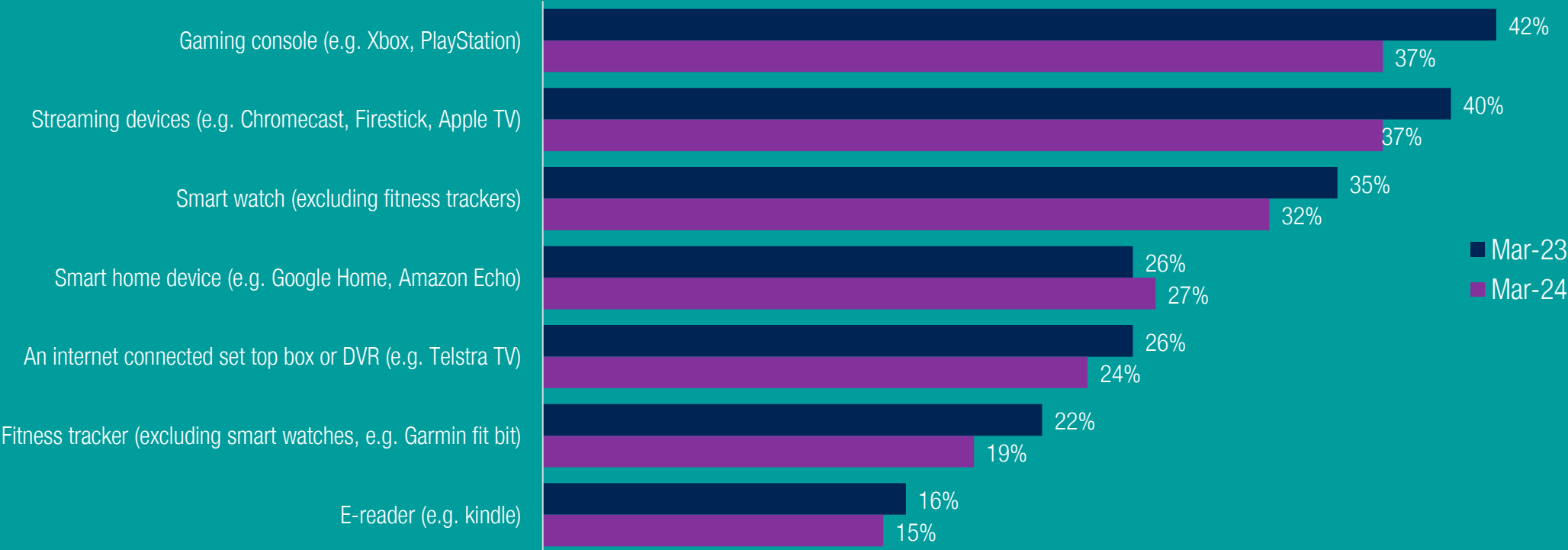
78% Of households have at least one 'other' device

45% Of households have a smart device (smart watch or home device)

63% Of Australians aged 14-24 own a gaming console

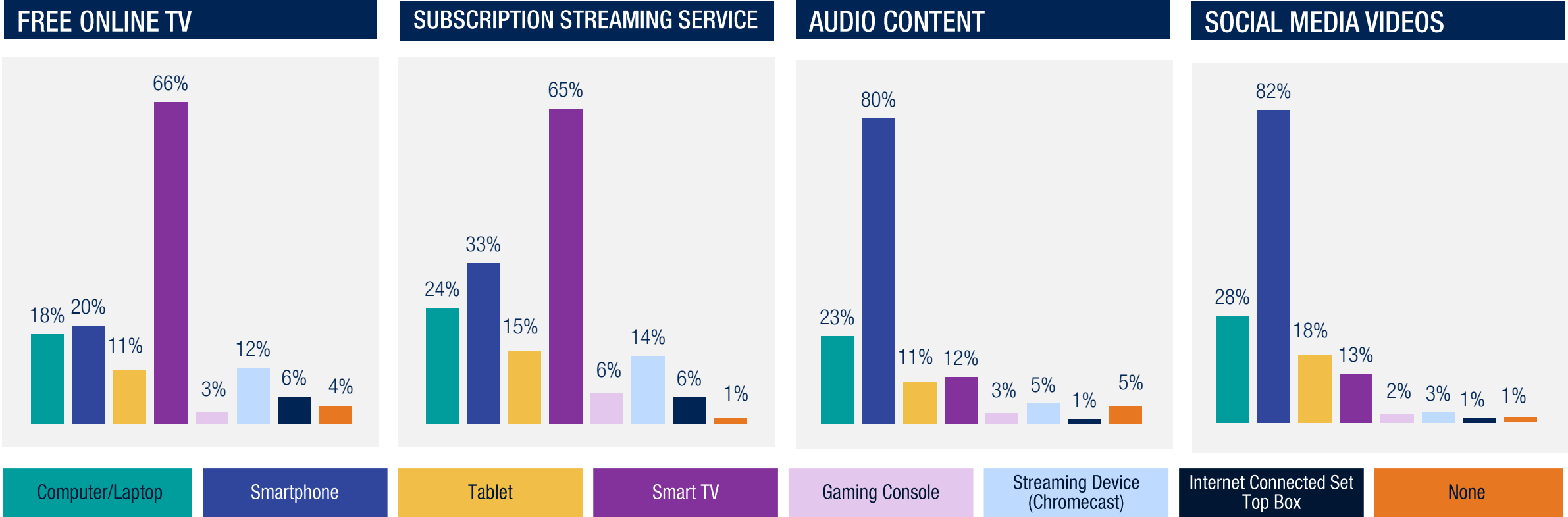
WHILE THERE HAS BEEN A DECREASE ACROSS MANY 'OTHER DEVICES' IN THE HH, POSSIBLY DUE TO TOUGHER ECONOMIC CONDITIONS, THERE HAS BEEN A SLIGHT INCREASE IN SMART HOME DEVICES

OTHER DEVICES IN HOUSEHOLD



SMARTPHONES ARE THE MOST POPULAR DEVICES FOR STREAMING AUDIO CONTENT AND SOCIAL MEDIA VIDEOS

DEVICES USED TO STREAM (LAST 7 DAYS)



THERE HAS BEEN A 3 PERCENTAGE POINT INCREASE IN AUSTRALIANS AGED 25-54 STREAMING FREE ONLINE TV (BVOD) ON THEIR SMARTPHONE

DEVICES USED TO STREAM FREE ONLINE TV (LAST 7 DAYS) - SMARTPHONE

MAR-23

24%

Australians aged 25-54



MAR-24

27%

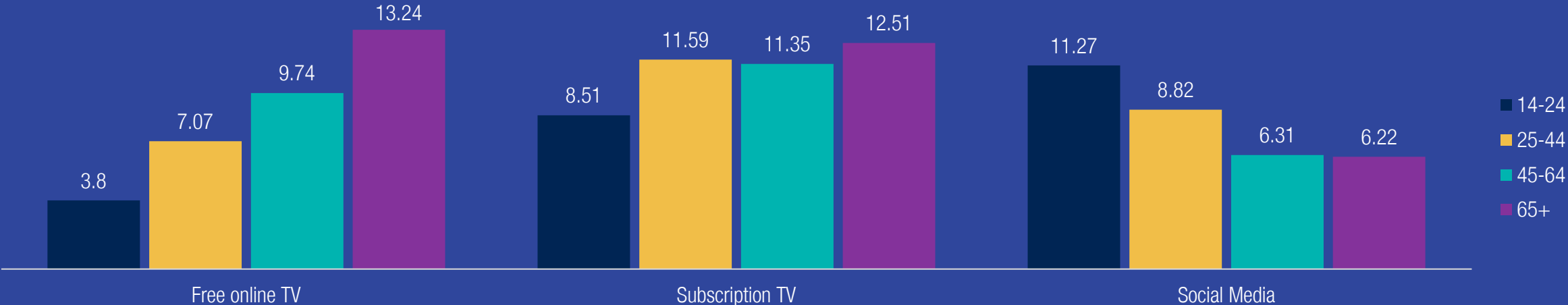
Australians aged 25-54



ONLINE MEDIA BEHAVIOUR

P65+ SPEND THE MOST TIME CONSUMING BOTH FREE ONLINE & SUBSCRIPTION TV, WHILE THE UNDER 30'S SPEND THE MOST TIME ON SOCIAL MEDIA

AVERAGE HOURS SPENT PER WEEK (CLAIMED)

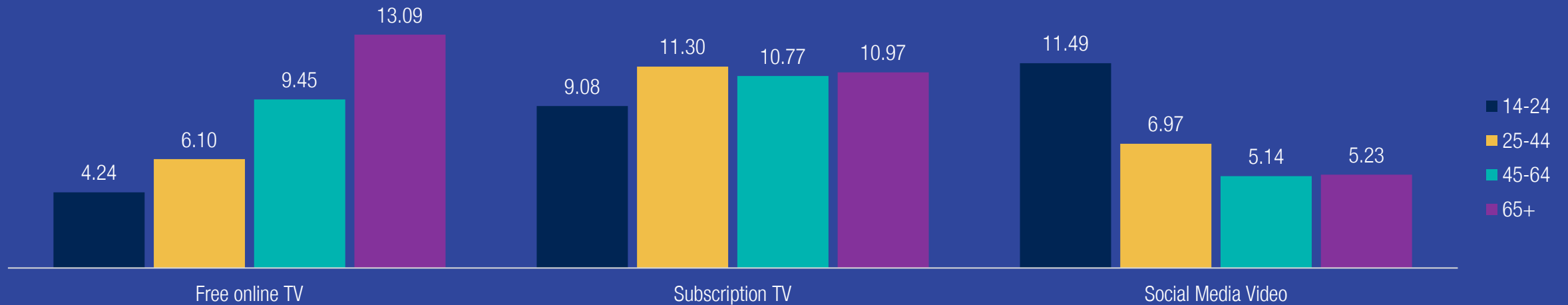


18.7

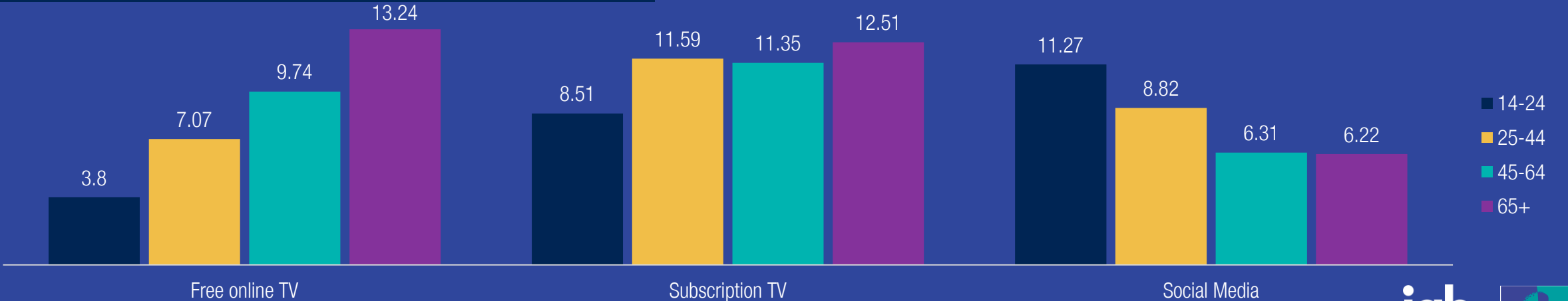
Average number of hours Australians 14+ claim to spend watching free online TV, subscription TV or social media videos per week

THE 25-44S ARE CONSUMING MORE HOURS ON SOCIAL MEDIA & 65+ ARE SPENDING MORE TIME ON SUBSCRIPTION TV

AVERAGE HOURS SPENT PER WEEK (CLAIMED) MAR-23



AVERAGE HOURS SPENT PER WEEK (CLAIMED) MAR - 24



SOCIAL MEDIA & PAID STREAMING SERVICES ARE THE MOST CONSUMED ONLINE MEDIA IN THE PAST 7 DAYS

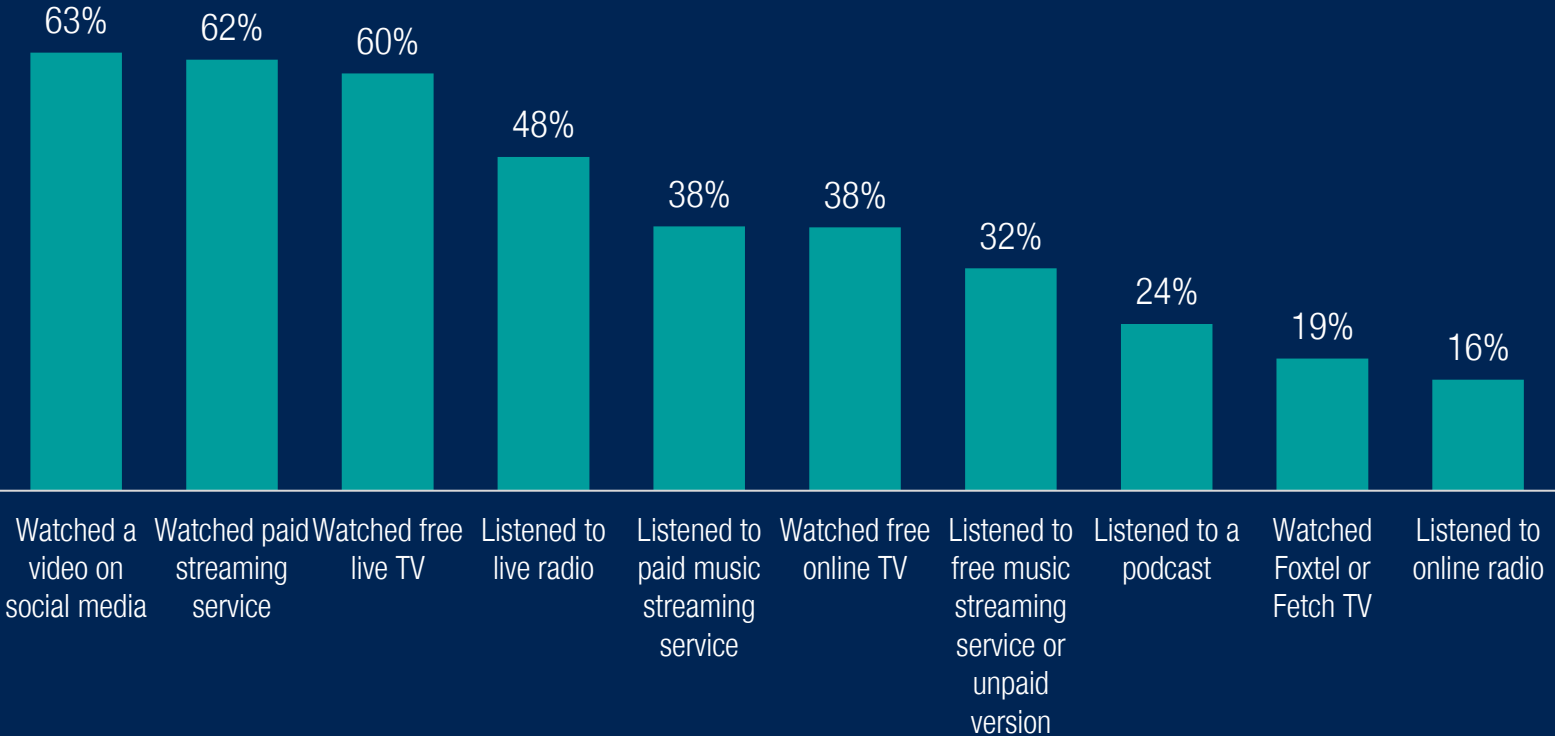
ONLINE MEDIA CONSUMPTION (L7D)

84%

Watched any video online in the past 7 days

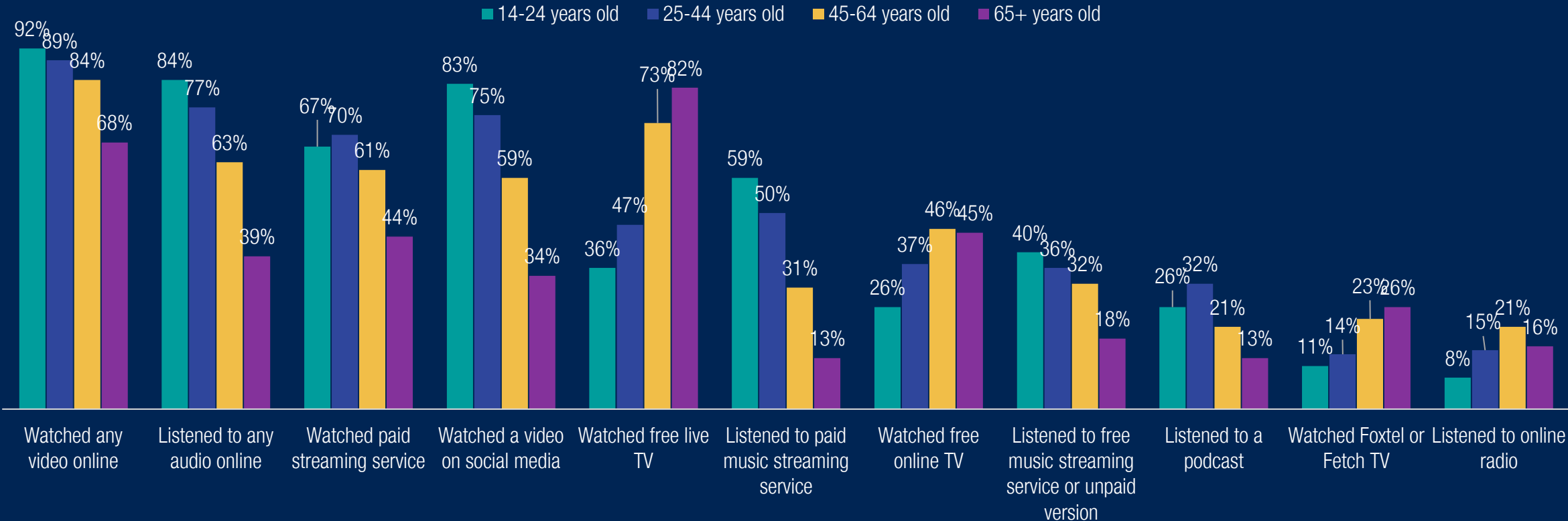
66%

Listed to any audio online in the past 7 days



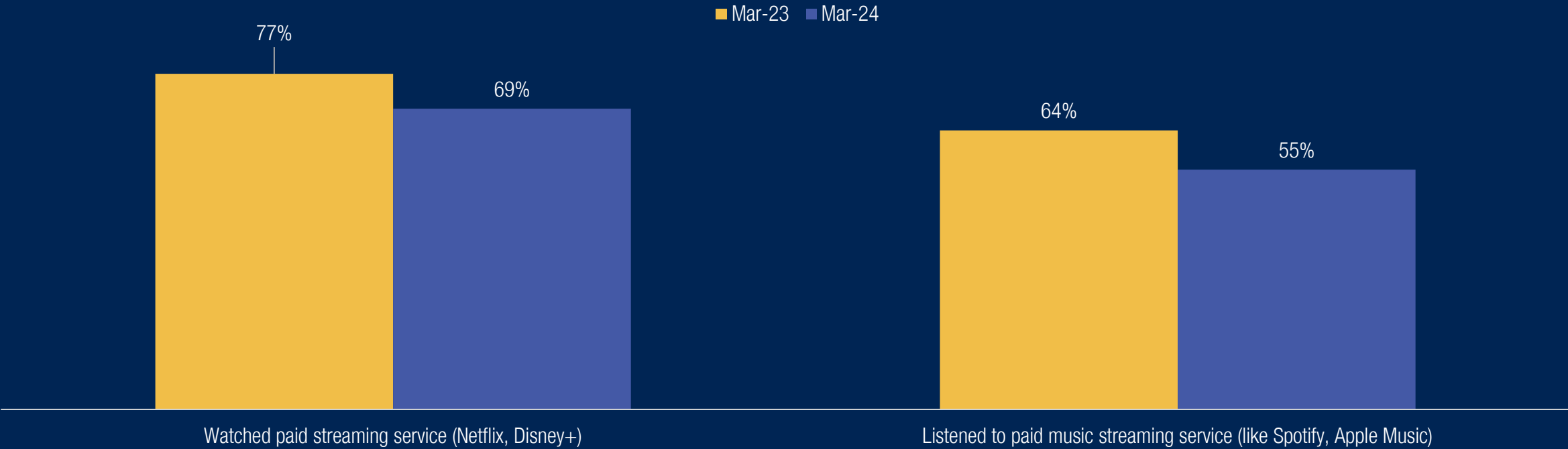
THE UNDER 30'S DEMOGRAPHIC ARE HEAVY CONSUMERS OF SOCIAL MEDIA ALONG WITH VIDEO AND AUDIO STREAMING SERVICES

ONLINE MEDIA CONSUMPTION BY AGE (L7D)



COST OF LIVING PRESSURE CONTINUES TO DRIVE ATTRITION IN PAID STREAMING SERVICE ACROSS BOTH VIDEO AND AUDIO, PARTICULARLY IN THE UNDER 45s

PAID STREAMING CONSUMPTION 14-44 YEARS OLD (L7D) – MAR 24 VS. MAR 23





KEY TAKEOUTS

KEY TAKEOUTS MARCH 2024



SMARTPHONES ARE #1 FOR STREAMING

Smartphones are the most used device for streaming audio content and social media videos, and are the second most used device for watching free online TV or subscription services.



AUSTRALIANS ARE MULTI-DEVICE CONNECTED

30% of Australians 14+ own a smartphone, computer and tablet for personal use and have a smart TV in their household



SOCIAL MEDIA & PAID STREAMING REIGN

Social Media platforms are the most consumed online media platform in the past 7 days, followed closely by paid streaming.



DIFFERENCES BETWEEN DEMOGRAPHICS

Australians 65+ spend the highest average amount of time consuming both free online & subscription tv, while the under 30's spend the most time on social media

KEY YOY TRENDS – MARCH 2024 VS. MARCH 2023



ONLINE USAGE GROWS BY 950,000 YEAR ON YEAR

Online usage continues to increase with more people 65+ transitioning online. Frequency of usage also continues to increase.



ANDROID INCREASES USAGE IN THE 25+ DEMO

Android sees an 8 percentage point increase in usage YOY in the 25+ age demo, which was strongly driven by the 45-54 demo with a 15 percentage point increase



AUSTRALIANS REDUCE THE NUMBER OF DEVICES IN THE HH

There has been a decrease across the board in “other devices” in the HH, possibly due to tougher economic conditions



PAID STREAMING CONSUMPTION DECREASES

Cost of living pressure continues to drive attrition in paid streaming service across both video and audio. This decrease is seen most in the under 45 age demo



SURVEY PROFILE

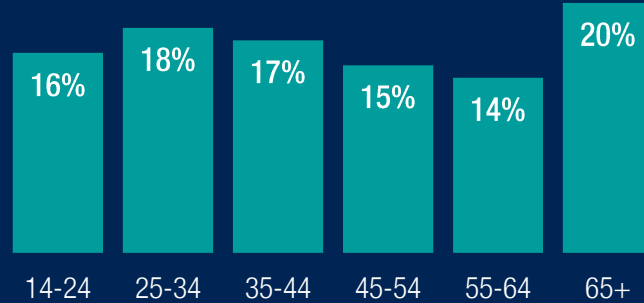
ESTABLISHMENT SURVEY PROFILE

21,617,000

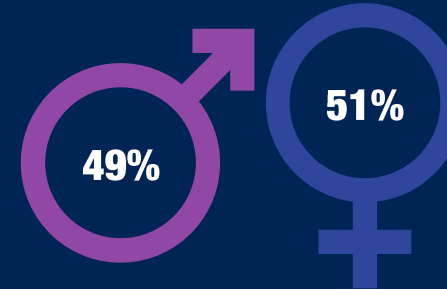
Total Internet Population*

*Australians 14+ who have accessed the internet in the past month

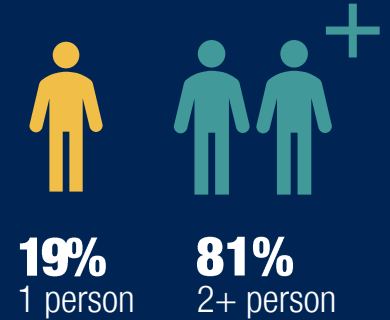
AGE



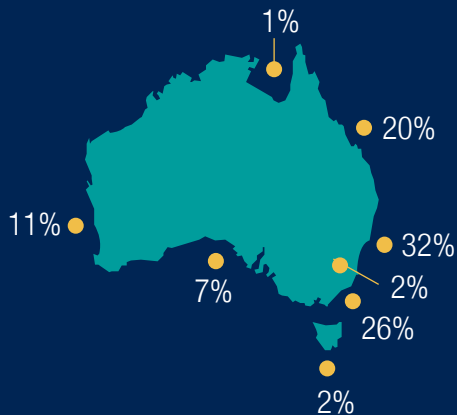
GENDER



HH SIZE



LOCATION



PROFILE



87%
Grocery buyers



56%
In paid employment



64%
Live in metro areas (5 cap)



27%
Tertiary educated

ETHNICITY



BACKGROUND & METHODOLOGY

As the preferred digital currency provider, Ipsos surveys 12,000 Australians aged 14 and over per annum to capture their digital device ownership and usage at both a household and personal level.

The survey is designed to create a digital universe on which to project online audiences and to provide panel recruitment targets covering demographics and device type ownership and usage. This is an Ipsos run combination of a phone-based survey (via CATI) and online survey (via Ipsos Interactive Services) set up specifically for Ipsos iris that will provide quality statistics vital for panel control and weighting.

The survey delivers a true understanding of the Australian digital landscape covering demography and geography; personal and household digital device usage and type as well as frequency of using the internet.

The survey includes questions common to OzTAM Establishment Survey to enable CTV data integration in the future.

