



DEVICE OWNERSHIP & TRENDS

July 2019

BACKGROUND & METHODOLOGY

As part of IAB Australia's role in managing the digital audience measurement currency endorsement process, it is vital that there is continual tracking of macro digital device ownership and usage trends to ensure that our measurement systems are built to reflect the Australian population.

Nielsen, as the endorsed currency provider, survey 1,000 Australians every month to assess their individual digital device ownership, operating systems used and estimated frequency of usage. This data is used to design the panel that is then combined with granular census site data to provide the market with our world leading digital measurement solution.

The IAB Measurement Council, which comprises representatives from 20 different commercial organisations, review and assess enumeration and currency data every month to ensure the currency continues to evolve and map consumer media usage habits.

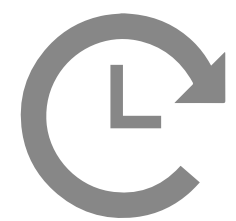
The data in this report, exclusive to IAB members, is primarily generated from this regular market enumeration study.

KEY POINTS

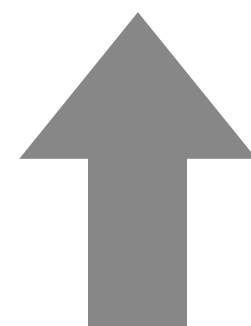
- 21m Australians online in July 2019
- 16.8m Australians online on their phone daily
- 89% of people aged 14+ have a smartphone
- 2.2m more Australians online daily on smartphones than 2 years ago
- Tablet ownership has decreased slightly to 56% of people 14+
- 6m Australians access internet content via a tv screen daily
- Nearly 3m Australians have a smart speaker at home
- 10.6m Australians (51%) have access to Internet at work via desktop

*Sources: Nielsen Digital Panel text July 2019 PC 2+, Smartphone and Tablet 18+ ;
Nielsen Enumeration Survey Jun-July 2019, P 14+, n=3000 per quarter*

SUMMARY – MARCH 2019



112hrs online per person (18+)



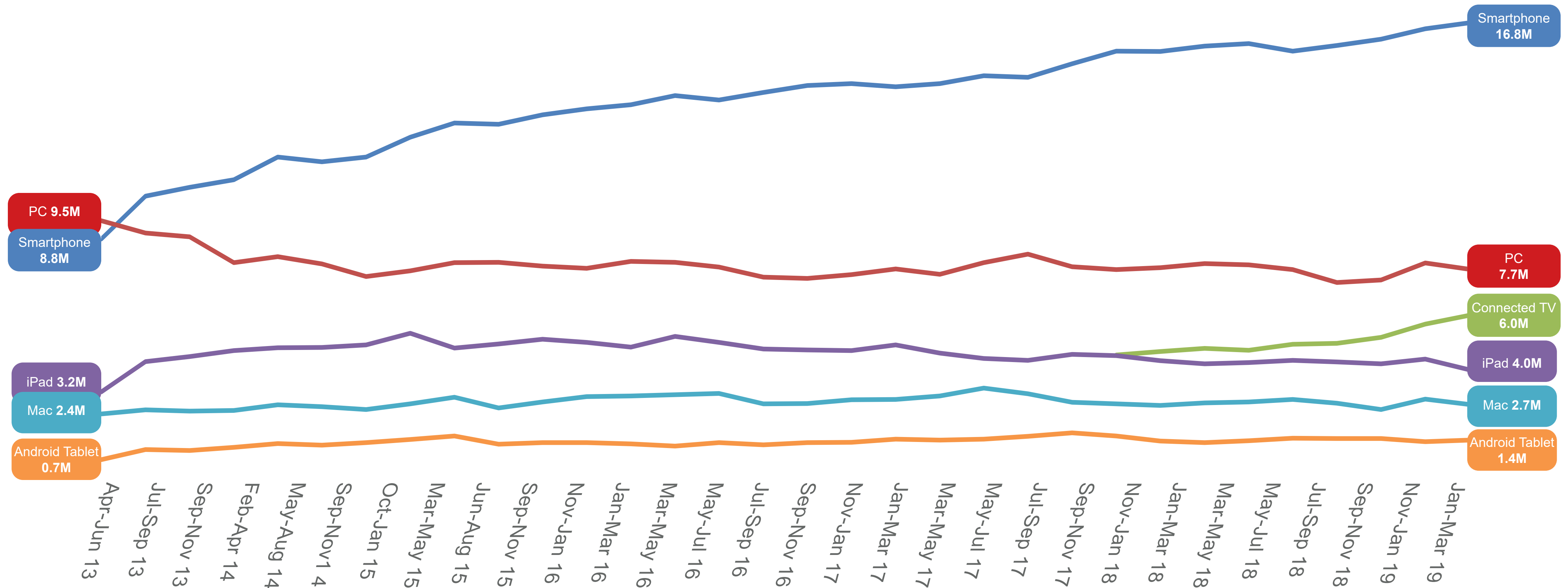
29% YOY increase in total time online for Computer, Smartphone & Tablet

| PEOPLE 14+ | Millions | % |
|-------------------------------------|----------|-----|
| Smartphone Ownership | 18.6 | 90% |
| iOS | 10.6 | 51% |
| Android | 7.7 | 37% |
| Other OS | 0.3 | 2% |
| Own more than 1 Smartphone | 1.9 | 9% |
| Daily Use of Internet on Smartphone | 16.8 | 81% |

| PEOPLE 14+ | Millions | % |
|--------------------------|----------|-----|
| Tablet Ownership | 11.6 | 56% |
| iPad | 8.3 | 40% |
| Android tablet | 3.3 | 16% |
| Use iPad daily | 4.0 | 19% |
| Use Android tablet daily | 1.4 | 7% |

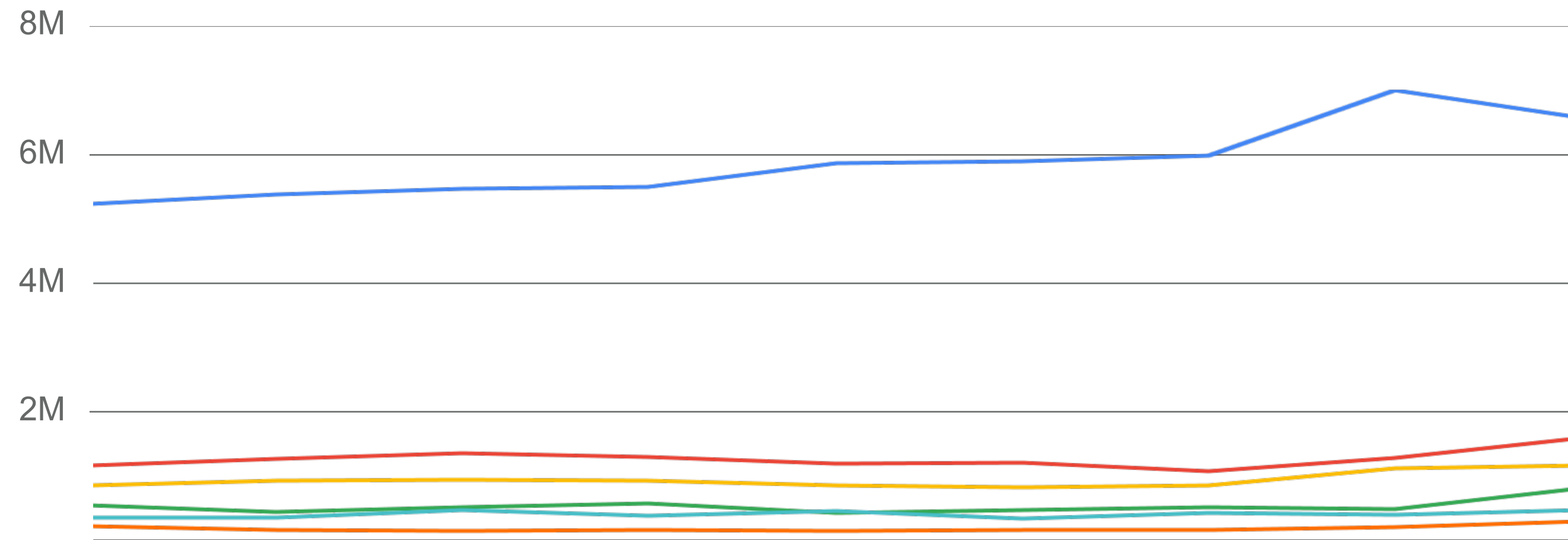
DAILY INTERNET USAGE BY DEVICE

- 2.2 million more Australians online daily on their smartphones than 2 years ago.
- More than double the amount of people online with a smartphone compared to a PC each day.
- 32% increase in the number of people consuming CTV content everyday from beginning of 2018.



INTERNET CONTENT ON TV SCREEN

- 6.0m Australians accessed yesterday – nearly a third of Australians 14+.
- Half of CTV viewers mostly or always watch with someone else.



Half of Connected TV viewers mostly or always watch with someone else

| HOW IS THE CONTENT VIEWED? | % of Connected TV Viewers |
|---|---------------------------|
| Always viewing alone | 8% |
| Mostly viewing alone | 14% |
| Viewing with another household member about half the time | 27% |
| Mostly viewing with another household member | 37% |
| Always viewing with another household member | 14% |

90% of CTV Consumers Accessed CTV Content in the Last Week

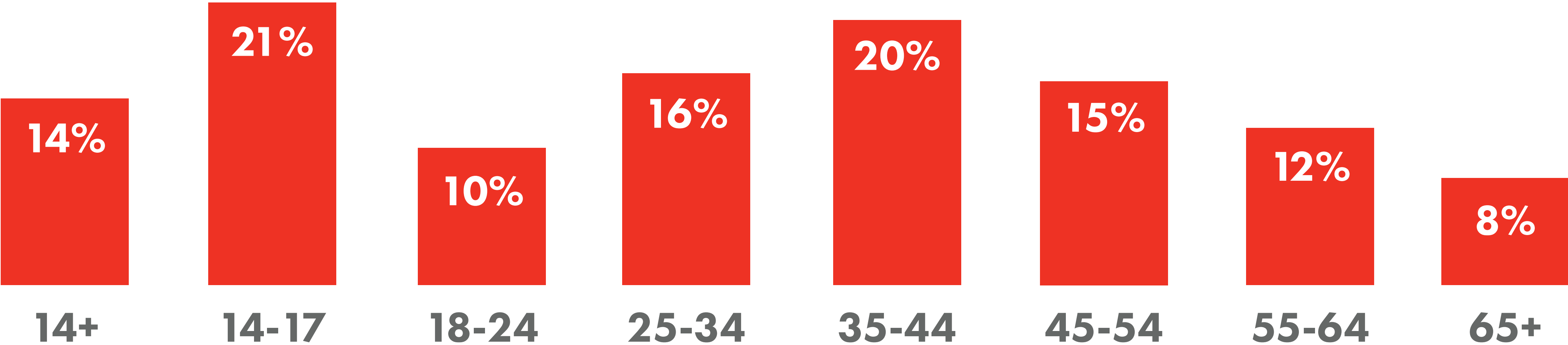
| | % of Total Population 14+ | % of Connected TV Population |
|-------------------------|---------------------------|------------------------------|
| Yesterday | 29% | 65% |
| Past week | 12% | 28% |
| Past two weeks | 2% | 4% |
| Past month | 1% | 3% |
| Longer than a month ago | 0% | 1% |

| AUSTRALIANS 14+ VIEWED INTERNET CONTENT ON TV | | | | | | | | | |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Jan-Mar 2018 | Mar-May 2018 | May-Jul 2018 | Jul-Sep 2018 | Sep-Nov 2018 | Nov-Jan 2019 | Jan-Mar 2019 | Mar-May 2019 | Jun-Jul 2019 |
| Smart TV ('000) | 5,222,882 | 5,356,188 | 5,439,106 | 5,477,964 | 5,821,869 | 5,850,041 | 5,940,164 | 6,926,234 | 6,509,291 |
| Apple TV ('000) | 1,299,977 | 1,394,120 | 1,478,065 | 1,416,446 | 1,328,704 | 1,330,670 | 1,209,313 | 1,409,396 | 1,711,737 |
| Chromecast ('000) | 995,204 | 1,069,704 | 1,085,582 | 1,068,841 | 989,518 | 967,432 | 1,001,614 | 1,257,109 | 1,297,388 |
| Telstra TV ('000) | 692,084 | 597,950 | 668,228 | 721,111 | 584,346 | 621,371 | 665,165 | 636,945 | 953,404 |
| Fetch TV ('000) | 380,802 | 320,189 | 318,806 | 332,279 | 307,482 | 328,938 | 321,525 | 376,627 | 461,137 |
| Other Device ('000) | 508,404 | 506,741 | 628,292 | 547,039 | 606,613 | 501,590 | 581,493 | 559,211 | 626,635 |

SMART SPEAKER OWNERSHIP

- Nearly 3 million Australians have a smart speaker at home
- 57% use it weekly.
- 69% use it monthly.

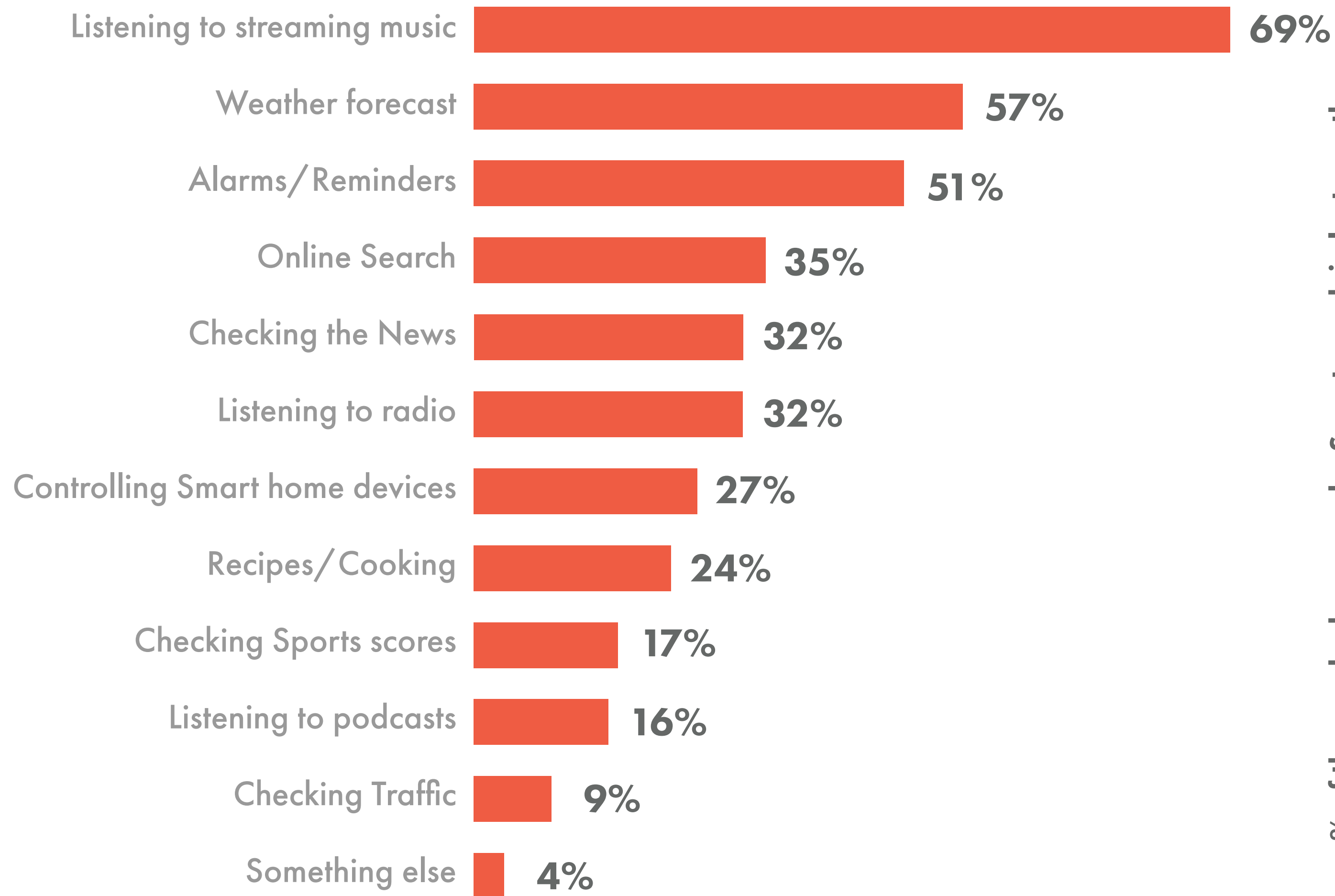
% WITH SMART SPEAKER AT HOME



Source: IAB Australia Enumeration Study Age 14+ July 2019 n=3000 per quarter

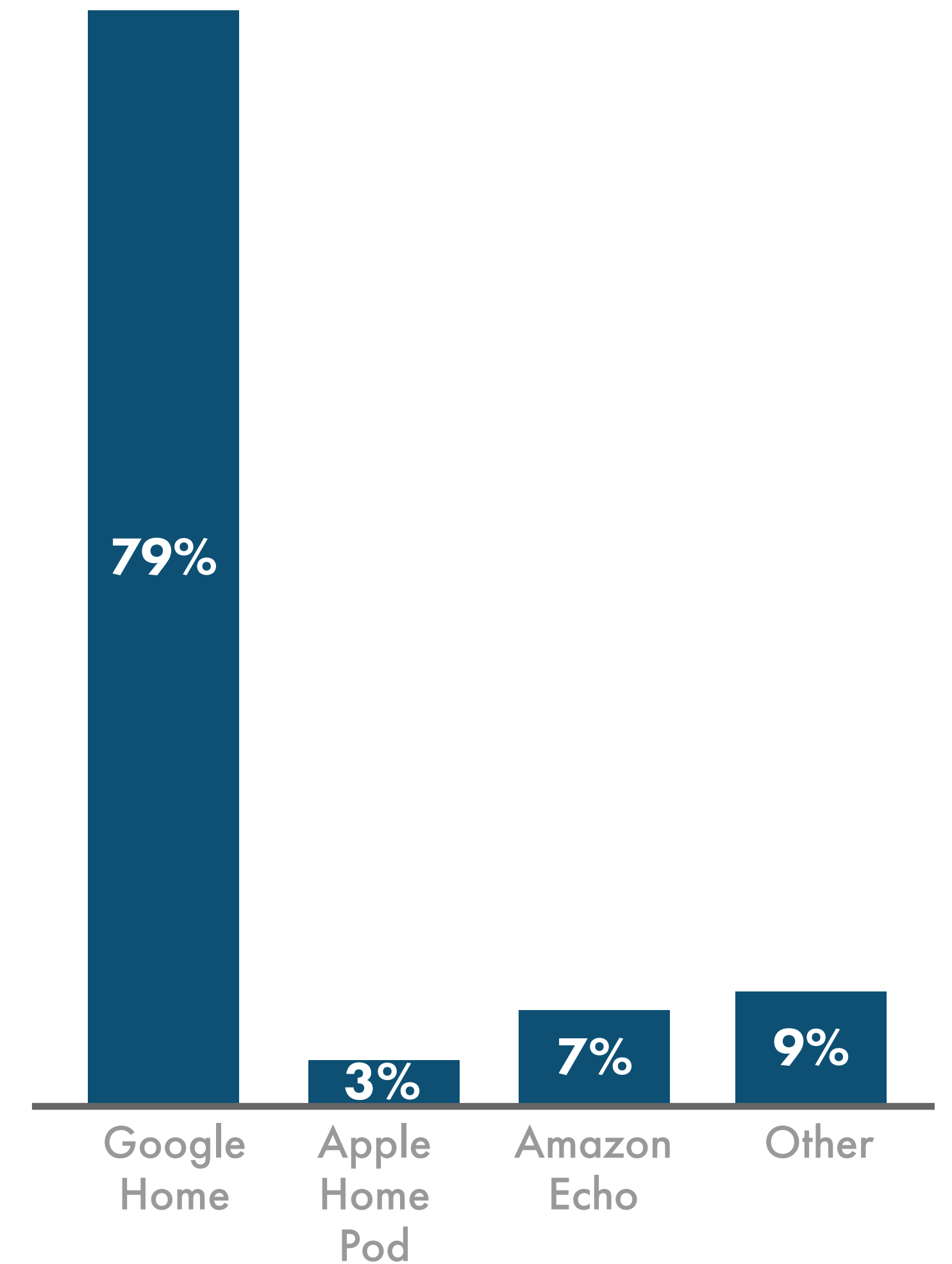
SMART SPEAKER USAGE

USES OF SMART SPEAKER % THOSE USED SMART SPEAKER IN LAST MONTH



% of those who have used a Smart speak in last month

TYPE OF SMART SPEAKER % OF OWNERS



ABOUT THE INTERACTIVE ADVERTISING BUREAU

The [Interactive Advertising Bureau](#) (IAB) Limited is the peak trade association for online advertising in Australia & was incorporated in July 2010. As one of over 43 IAB offices globally, and with a rapidly growing membership, IAB Australia's principal objective is to support and enable the media and marketing industry to ensure that they thrive in the digital economy. The role of the IAB is to work with its members and the broader advertising and marketing industry to assist marketers to identify how best to employ online as part of their marketing strategy, to better target and engage their customers and build their brands.

FOR MORE INFORMATION ON THE DATA IN THIS REPORT



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