

DEVICE OWNERSHIP AND TRENDS

NOVEMBER 2016



iab.
australia

nielsen
.....

BACKGROUND AND 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, surveys 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 16 different media organisations as well as the Media Federation of Australia, reviews and assesses enumeration and currency data every month to ensure the currency continues to evolve and reflect consumer media usage habits.

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

KEY POINTS

19.8m Australians online in November 2016

84% of people aged 14+ have a smartphone

72% of people aged 14+ access internet every day on their phone

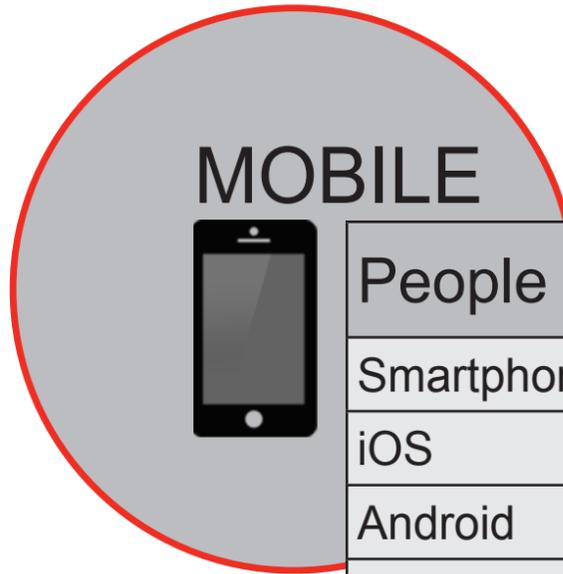
6% of people aged 14+ use more than one smartphone

iOS dominant on smartphones with 56% share of smartphones

1.5m less people going online on their desktop daily than 3 years ago

Tablet ownership (iPad & Android) penetration retracted 2% vs. last year

SUMMARY - NOVEMBER 2016



49% of people 14+ have access to a computer at work

| People 14+ | ('000) | % |
|-------------------------------------|--------|-----|
| Smartphone Ownership | 16,621 | 84% |
| iOS | 9,275 | 47% |
| Android | 6,610 | 33% |
| Other OS | 736 | 4% |
| Own more than 1 Smartphone | 1,260 | 6% |
| Daily Use of Internet on Smartphone | 14,246 | 72% |

72 hours online per person

30% access via single user computer

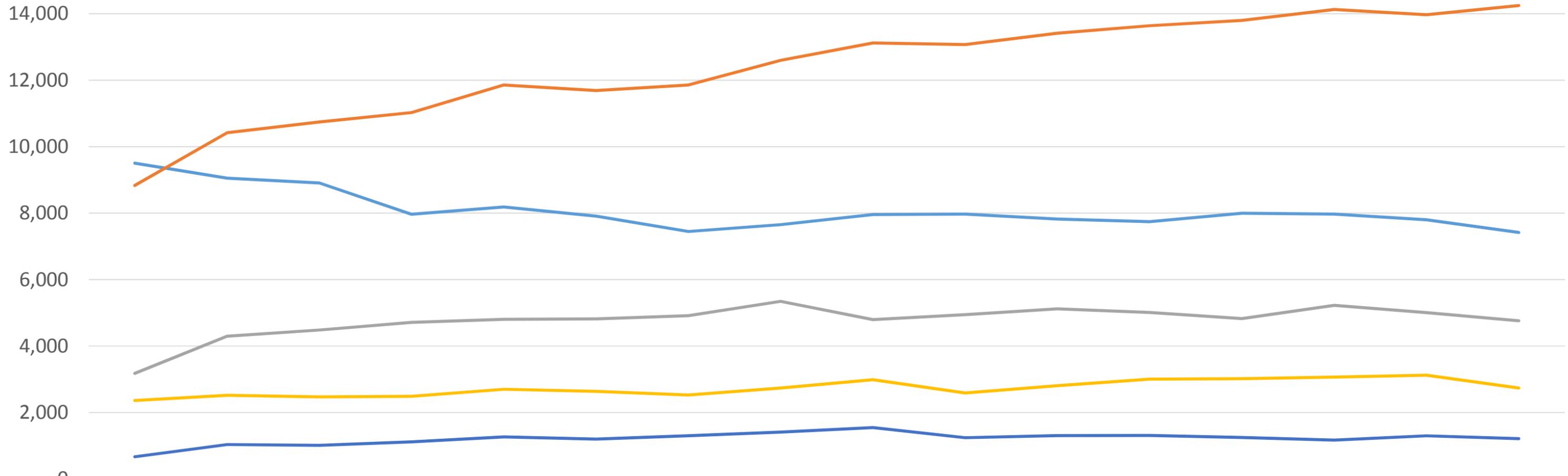
20% of people have access to a shared computer



| People 14+ | ('000) | % |
|--------------------------|--------|-----|
| Tablet Ownership | 11,118 | 56% |
| iPad | 8,194 | 41% |
| Android Tablet | 2,924 | 15% |
| Use iPad daily | 4,762 | 24% |
| Use Android tablet daily | 1,215 | 6% |

DAILY INTERNET USAGE BY DEVICE

14 million Australians aged 14+ using a smartphone to go online everyday



| | Jun-13 | Sep-13 | Nov-13 | Feb-14 | Aug-14 | Nov-14 | Jan-15 | May-15 | Aug-15 | Nov-15 | Jan-16 | Mar-16 | May-16 | Jul-16 | Sep-16 | Nov-16 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| PC | 9,504 | 9,052 | 8,907 | 7,964 | 8,183 | 7,907 | 7,446 | 7,654 | 7,958 | 7,969 | 7,822 | 7,743 | 7,997 | 7,970 | 7,798 | 7,416, |
| Smartphone | 8,832 | 10,416 | 10,744 | 11,023 | 11,857 | 11,688 | 11,857 | 12,597 | 13,120 | 13,071 | 13,413 | 13,638 | 13,798 | 14,125 | 13,967 | 14,245 |
| iPad | 3,178 | 4,297 | 4,483 | 4,712 | 4,805 | 4,816 | 4,913 | 5,346 | 4,796 | 4,948 | 5,119 | 5,010 | 4,825 | 5,224 | 5,005 | 4,761, |
| Mac | 2,362 | 2,517 | 2,468 | 2,489 | 2,701 | 2,636 | 2,528 | 2,739 | 2,988 | 2,589 | 2,810 | 3,005 | 3,021 | 3,065 | 3,124 | 2,740, |
| Android Tab | 669 | 1,038 | 1,011 | 1,120 | 1,268 | 1,202 | 1,303 | 1,414 | 1,546 | 1,244 | 1,307 | 1,310 | 1,250 | 1,170 | 1,300 | 1,215, |

Source: IAB Australia Enumeration Study Nov 2016, ages 14+, n=3000 per quarter

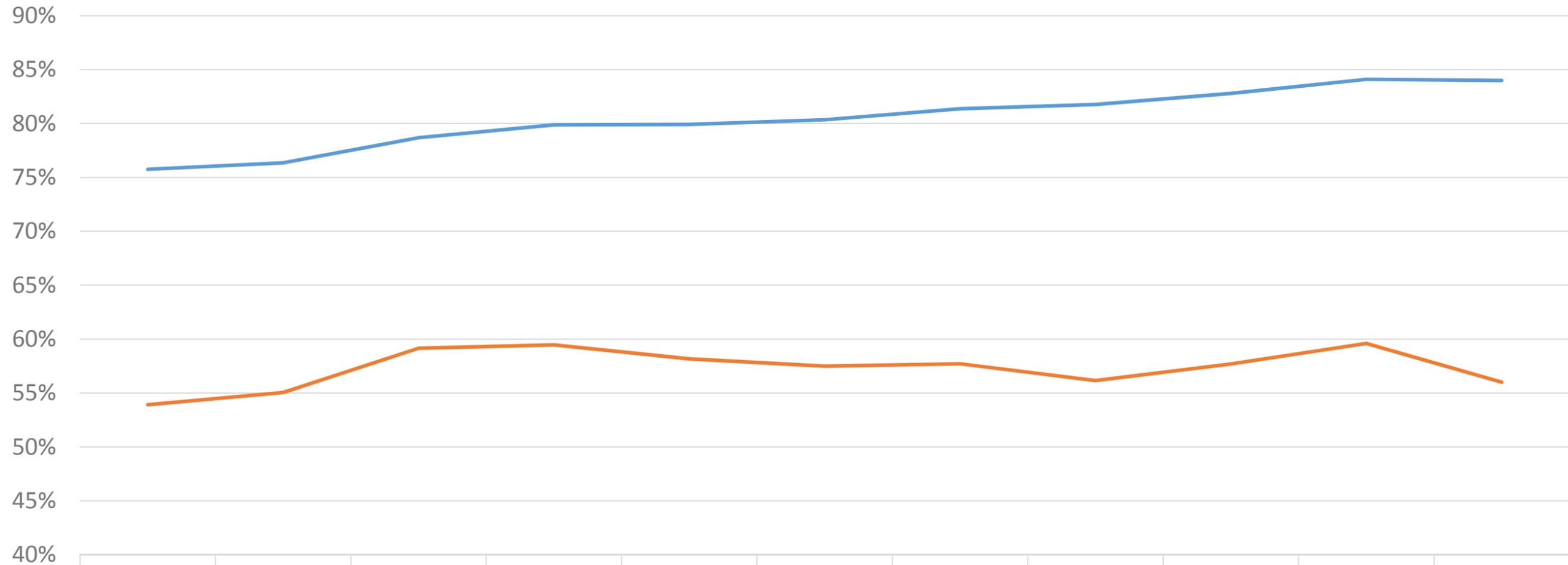
DEVICE OWNERSHIP TREND



84% of Australians 14+ own a smartphone



Tablet ownership retracted slightly in Nov.

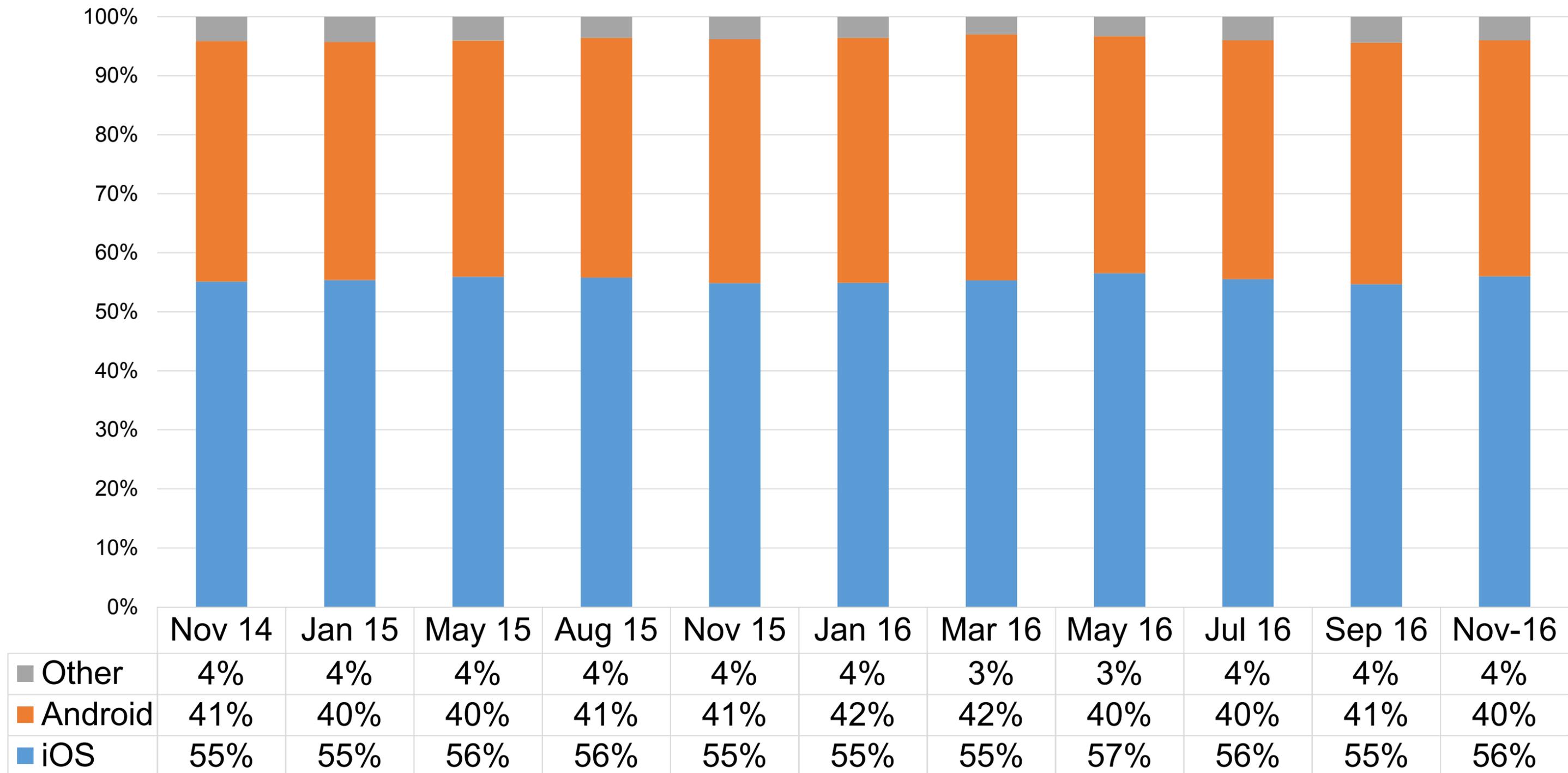


| | Nov 14 | Jan 15 | May 15 | Aug 15 | Nov 15 | Jan 16 | Mar 16 | May 16 | Jul 16 | Sep 16 | Nov-16 |
|--------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| — Smartphone | 76% | 76% | 79% | 80% | 80% | 80% | 81% | 82% | 83% | 84% | 84% |
| — Tablet | 54% | 55% | 59% | 59% | 58% | 57% | 58% | 56% | 58% | 60% | 56% |

Source: IAB Australia Enumeration Study Nov 2016, ages 14+, n=3000 per quarter

SMARTPHONE OS MARKETSHARE TREND

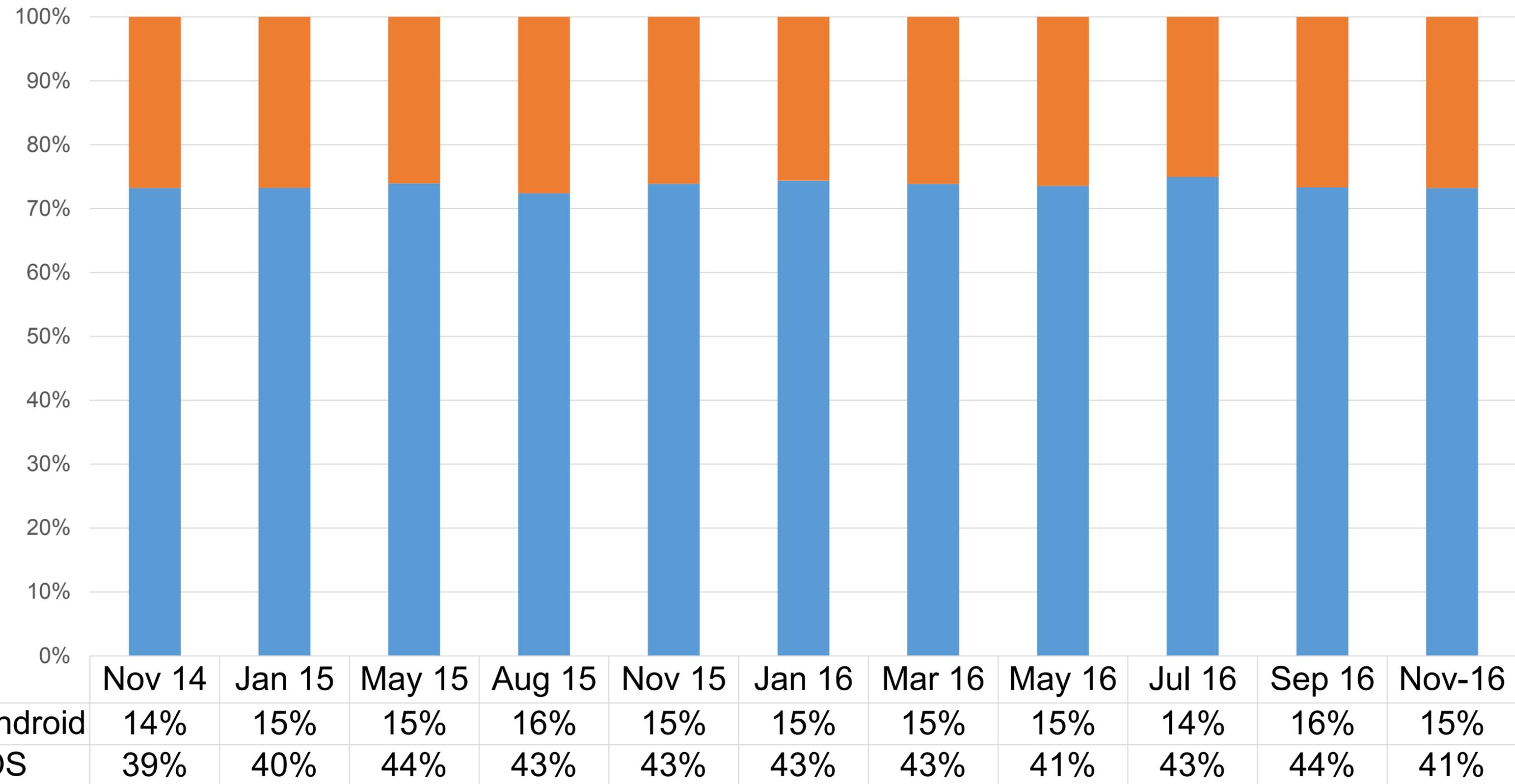
Smartphone OS share steady with iOS dominant



Source: IAB Australia Enumeration Study Nov 2016, ages 14+, n=3000 per quarter

TABLET OS MARKETSHARE TREND

iPad more than double Android ownership share



Source: IAB Australia Enumeration Study Nov 2016, ages 14+, n=3000 per quarter



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.

Further information on the data in this report

Gai Le Roy

Director of Research

E: gai.leroy@iabaustralia.com.au