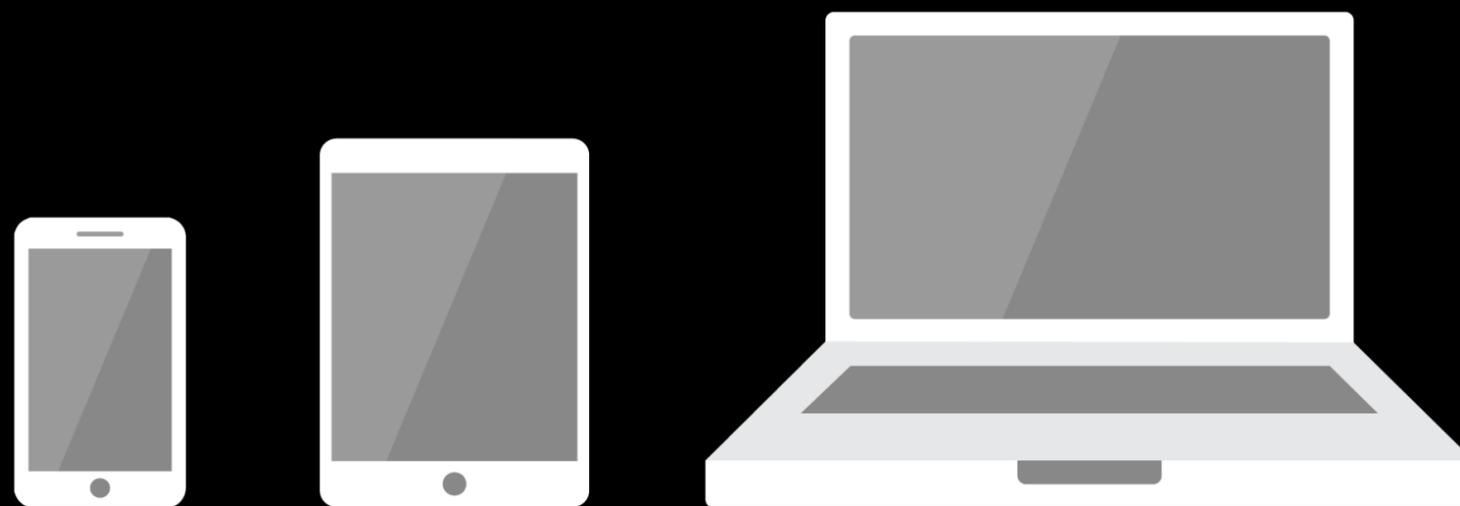


DEVICE OWNERSHIP AND TRENDS

SEPTEMBER 2017



iab.
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nielsen
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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, 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.

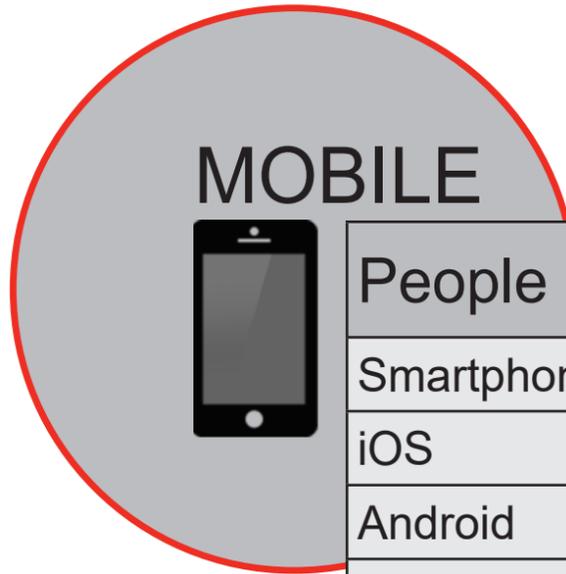
The data in this report, exclusive to IAB members, is primarily generated from this regular market enumeration study.



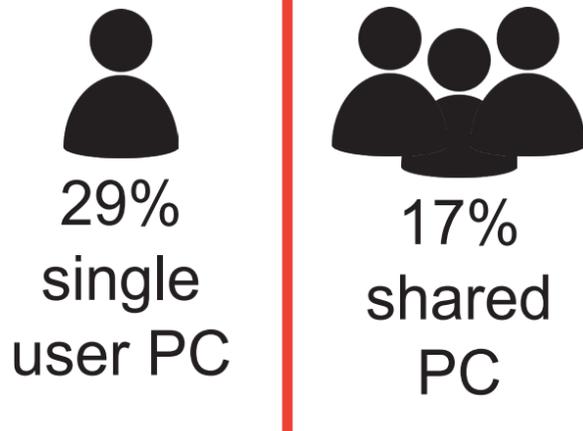
KEY POINTS

- 20.2 million Australians online in September 2017
- 14.9 million Australians online on their phone daily
- 86% of people aged 14+ have a smartphone
- 74% of people aged 14+ access internet every day on their phone
- 7% of people aged 14+ use more than one smartphone
- Smartphone OS share steady for 3 yrs— iOS 55% vs Android 42%
- 3 million more Australians online daily on smartphones than 3 years ago
- Slight increase in tablet ownership but frequency of usage is dropping

SUMMARY – SEPTEMBER 2017



46% ppl 14+ access from work

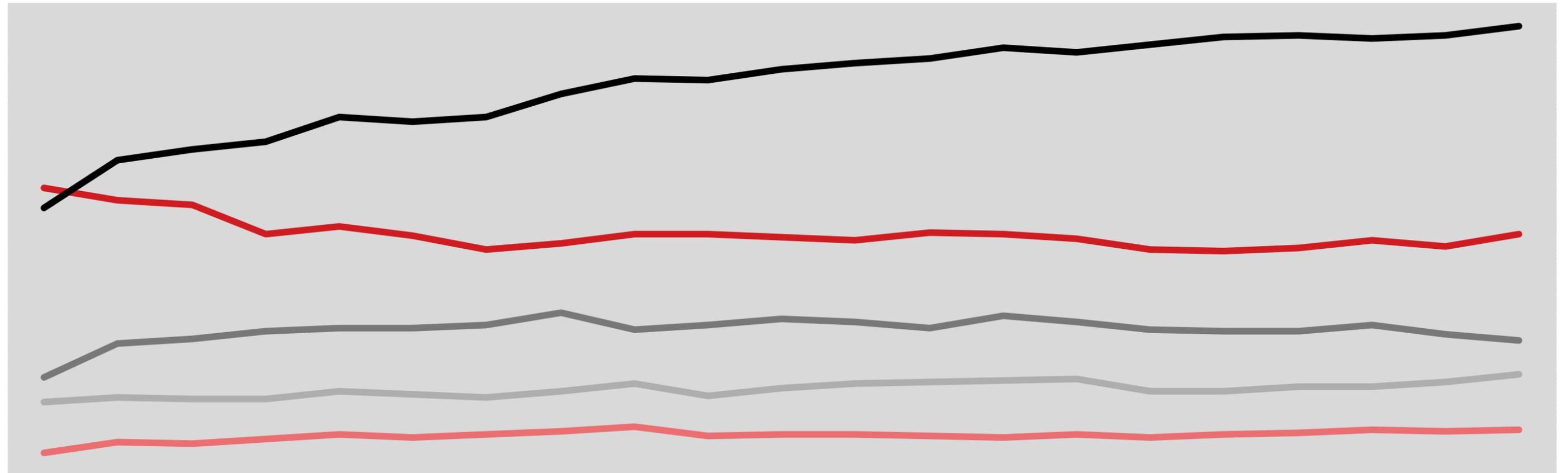


People 14+	('000)	%
Smartphone Ownership	17,323	86%
iOS	9,719	48%
Android	7,110	35%
Other OS	494	2%
Own more than 1 Smartphone	1,397	7%
Daily Use of Internet on Smartphone	14,863	74%

People 14+	('000)	%
Tablet Ownership	12,018	60%
iPad	8,378	42%
Android Tablet	3,640	15%
Use iPad daily	4,411	22%
Use Android tablet daily	1,429	7%

DAILY INTERNET USAGE BY DEVICE

- 3 million more Australians online daily on their smartphones than 3 years ago
- 6.9 million more people going online with a smartphone compared to a PC each day



	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	Jan-17	Mar-17	May-17	Jul-17	Sep-17
PC	9.5m	9.1m	8.9m	8.0m	8.2m	7.9m	7.4m	7.7m	8.0m	8.0m	7.8m	7.7m	8.0m	8.0m	7.8m	7.4m	7.4m	7.5m	7.7m	7.5m	8.0m
Smartphone	8.8m	10.4m	10.7m	11.0m	11.9m	11.7m	11.9m	12.6m	13.1m	13.1m	13.4m	13.6m	13.8m	14.1m	14.0m	14.2m	14.5m	14.6m	14.5m	14.6m	14.9m
iPad	3.2m	4.3m	4.5m	4.7m	4.8m	4.8m	4.9m	5.3m	4.8m	4.9m	5.1m	5.0m	4.8m	5.2m	5.0m	4.8m	4.7m	4.7m	4.9m	4.6m	4.4m
Mac	2.4m	2.5m	2.5m	2.5m	2.7m	2.6m	2.5m	2.7m	3.0m	2.6m	2.8m	3.0m	3.0m	3.1m	3.1m	2.7m	2.7m	2.9m	2.9m	3.0m	3.3m
Android Tab	0.7m	1.0m	1.0m	1.1m	1.3m	1.2m	1.3m	1.4m	1.5m	1.2m	1.3m	1.3m	1.2m	1.2m	1.3m	1.2m	1.3m	1.3m	1.4m	1.4m	1.4m

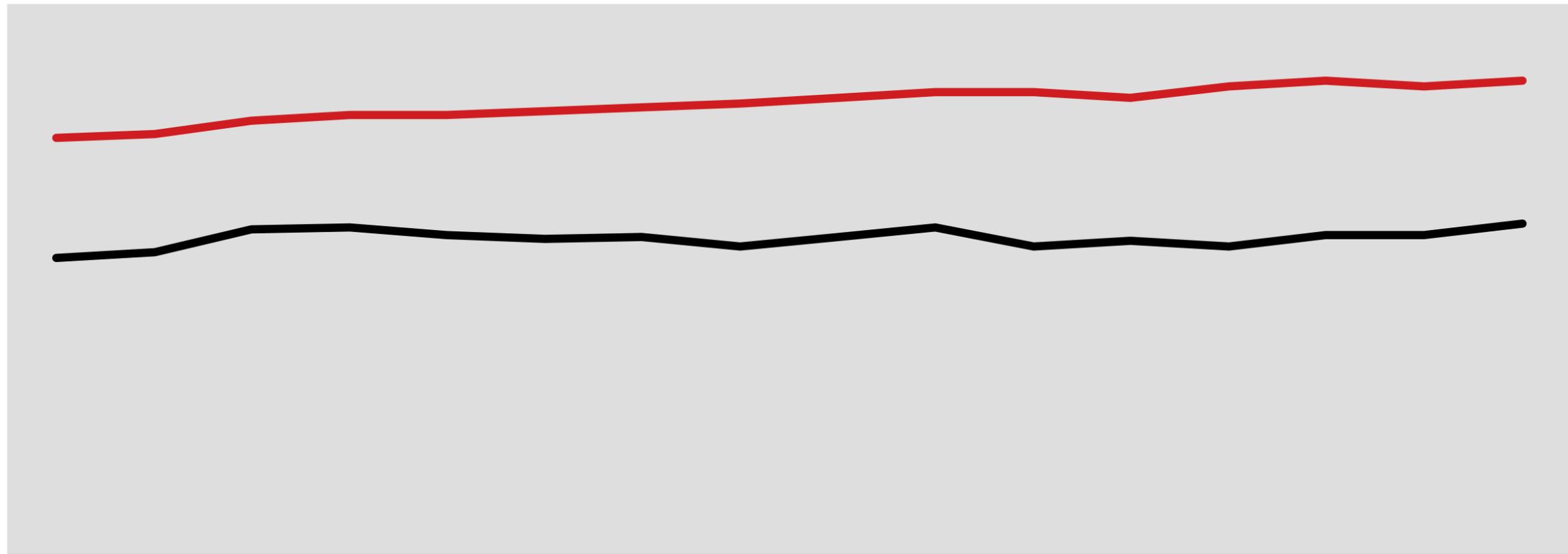
— PC — Smartphone — iPad — Mac — Android Tab

DEVICE OWNERSHIP TREND



86% of Australians 14+ own a smartphone, up 2% pts in 12 months

Slight increase in tablet ownership but usage is down - 22% of Android tablet owners go online with their device less than weekly, 14% of iPad users are online less than weekly



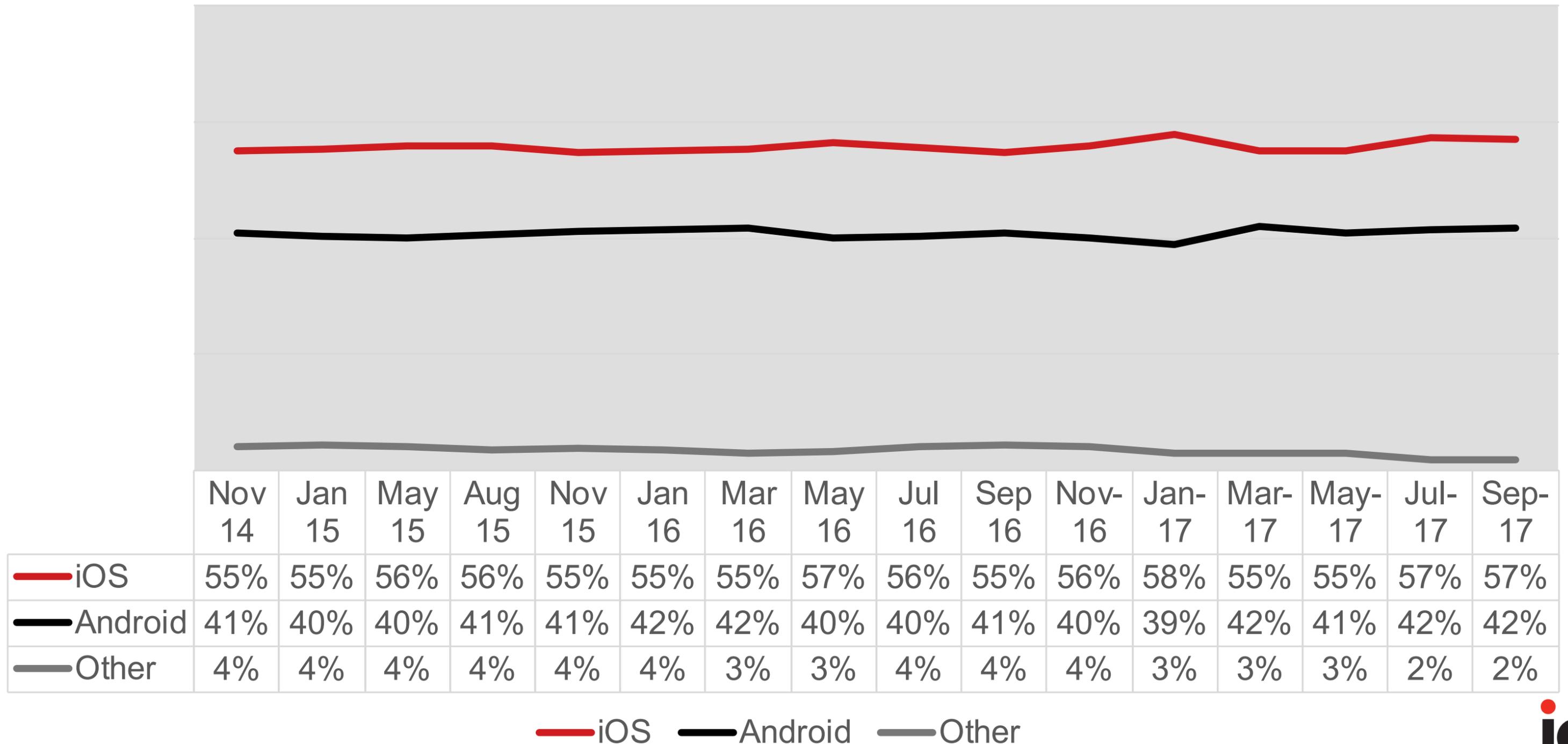
	Nov 14	Jan 15	May 15	Aug 15	Nov 15	Jan 16	Mar 16	May 16	Jul 16	Sep 16	Nov-16	Jan-17	Mar-17	May-17	Jul-17	Sep-17
Smartphone	76%	76%	79%	80%	80%	80%	81%	82%	83%	84%	84%	83%	85%	86%	85%	86%
Tablet	54%	55%	59%	59%	58%	57%	58%	56%	58%	60%	56%	57%	56%	58%	58%	60%

— Smartphone — Tablet

Source: IAB Australia Enumeration Study Sept 2017, ages 14+, n=3000 per quarter

SMARTPHONE OS SHARE TREND

- Operating system share between iOS and Android remains steady
- Other operating systems now represent only 2% of the market



Source: IAB Australia Enumeration Study Sept 2017, 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

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