DIGITAL LANDSCAPE REPORT

September 2025

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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 insights that may come up regarding the above

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@ipsos.com

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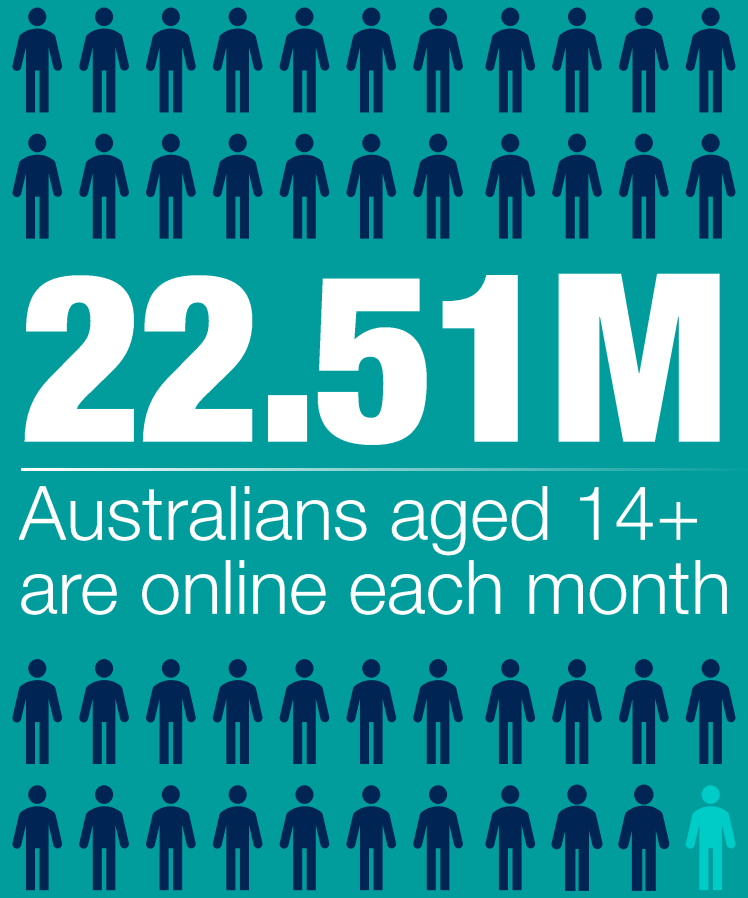
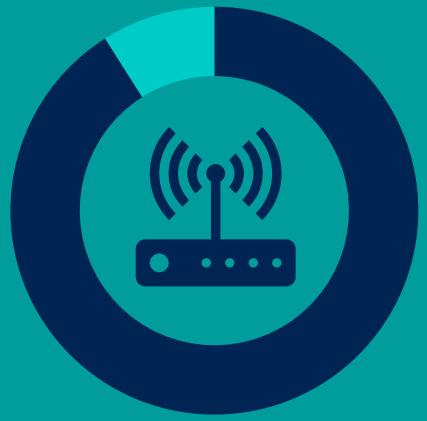
SNAPSHOT OF THE AUSTRALIAN ONLINE POPULATION 14+



22.51M

Australians aged 14+ are online each month



96%

Of the 14+ population were online yesterday

87%

Are online more than once or twice a day

About 0.1%

Of people 14+ have never been online

96.5%

Of people 16-17 years old were online yesterday

QLD

96% of QLD internet users aged 14+ were online yesterday

Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+

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DEVICE OWNERSHIP & USAGE

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22.25M PEOPLE 14+ OWN AT LEAST ONE SMARTPHONE FOR PERSONAL USE, WHILE THERE ARE 17.2M COMPUTERS AND 22.4M SMARTPHONES IN AUSTRALIAN HOUSEHOLDS.

PERSONALLY USED DEVICES

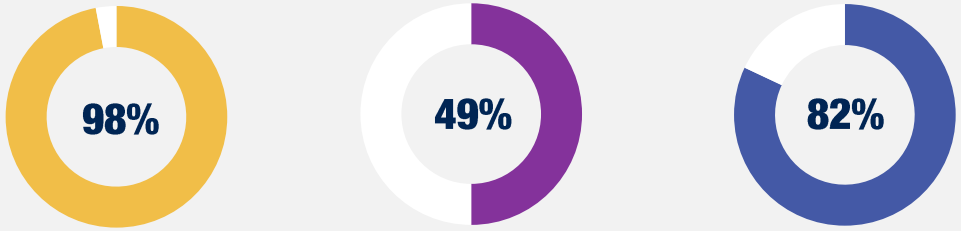
NUMBER OF DEVICES

25M Smartphones

12.4M Tablets

23.6M Computers

USE PENETRATION



DEVICES IN HOUSEHOLD

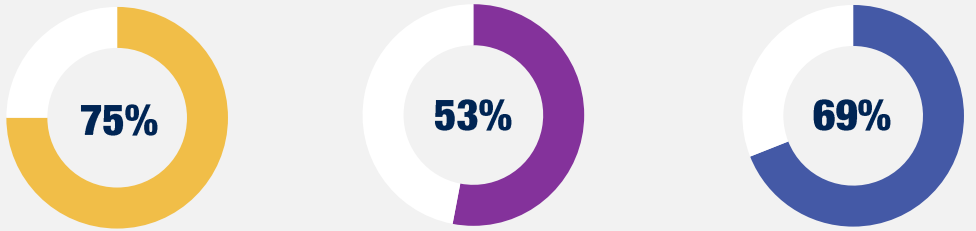
NUMBER OF DEVICES

22.4M Smartphones

9.9M Tablets

17.2M Computers

USE PENETRATION



Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+

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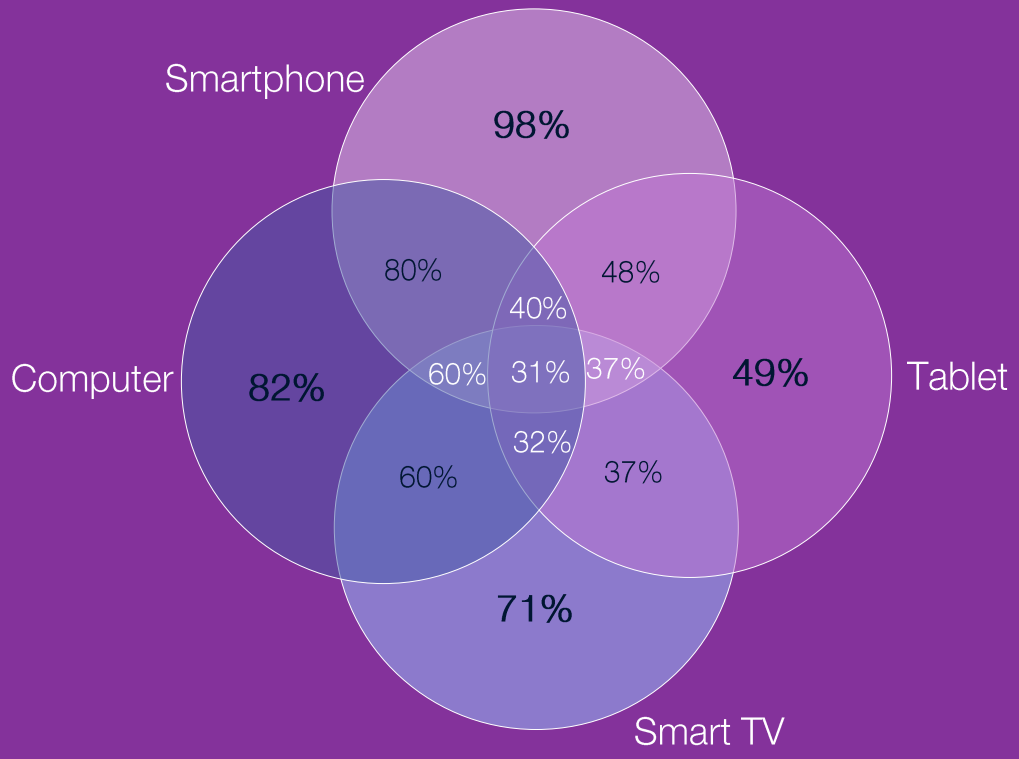
ALMOST ONE-THIRD OF AUSTRALIANS OWN A SMARTPHONE, COMPUTER, AND TABLET FOR PERSONAL USE AND ALSO HAVE A SMART TV IN THEIR HOUSEHOLD.

DEVICE OVERLAP

Devices for Personal Use



31%

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

2.7

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

Devices include: Smartphones, Tablets and Computers

Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+

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SMARTPHONE OWNERSHIP & USAGE

56% of females are Apple iPhone users, while SA and NT residents prefer Android smartphones.

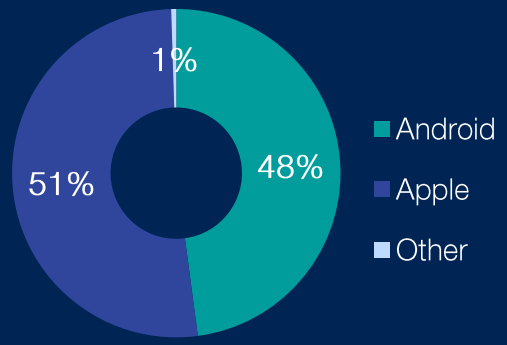
AVERAGE DEVICES

2.71
Average number of smartphones per household

1.11
Average number of smartphones per person

0.38*
Average owned by an employer or educational institutional

OPERATING SYSTEM



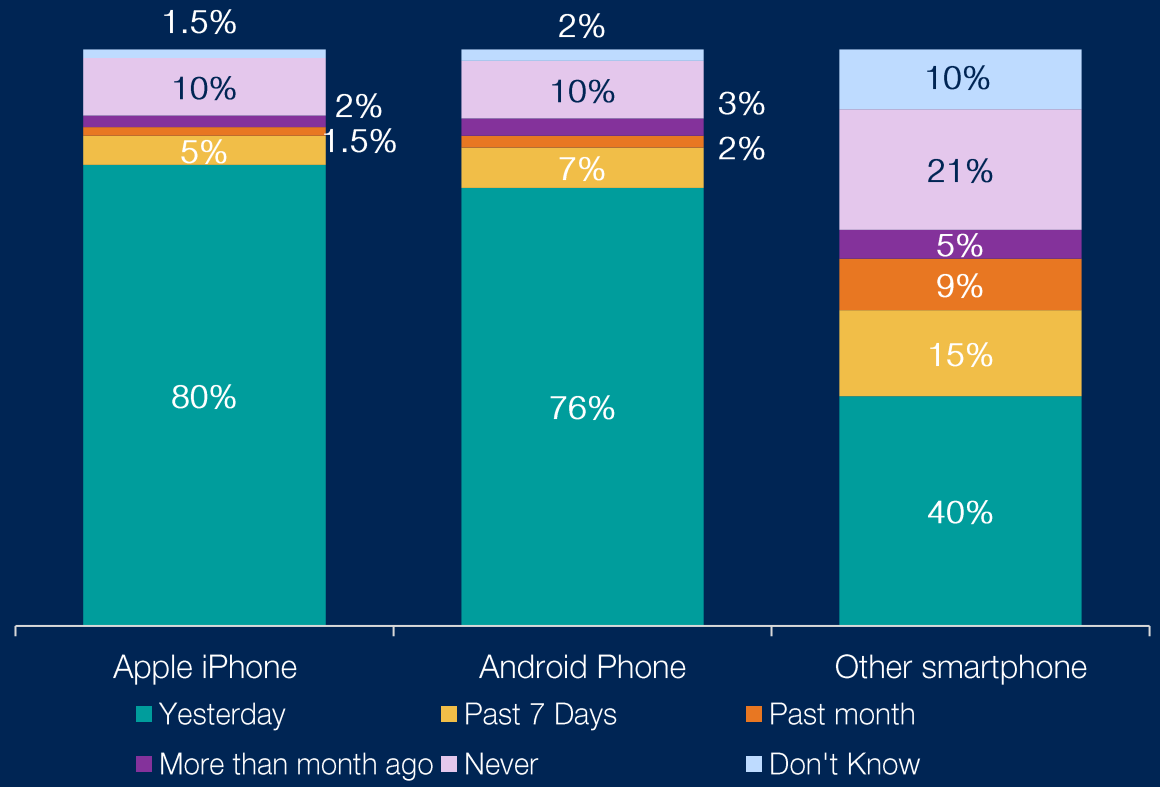
USAGE

People aged 18 to 24 are most inclined to use Apple smartphones.

In contrast, those 35 and over predominantly use Android smartphones.

Additionally, women are more prone to using Apple iPhones at 56%, whereas men tend to use Android smartphones at 52%.

DEVICE RECENCY



Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+
**Filter; P14+ who are employed or studying.*

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TABLET OWNERSHIP & USAGE

Apple iPad users are likely to be main or joint grocery buyers at a higher rate than users of Android tablets.

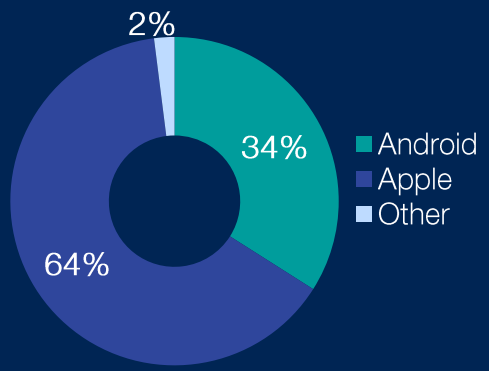
AVERAGE DEVICES

1.19
Average number of tablets per household

0.72
Average number of tablets per person

0.36*
Average owned by an employer or educational institutional

OPERATING SYSTEM

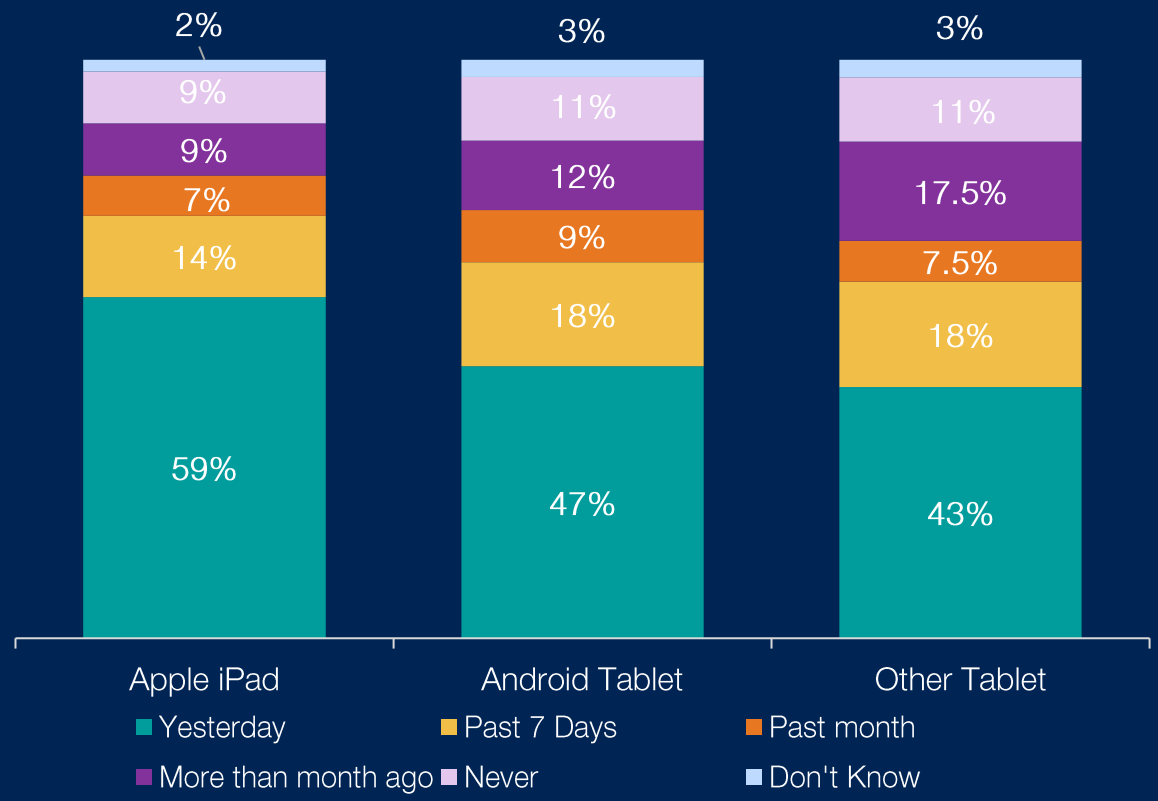


USAGE

Android tablet users are likely to be from Regional areas at 38% compared to Metro areas at 32%

iPad tablet users are more likely to be residing in ACT at 71%, compared with 25% for Android tablet users

DEVICE RECENCY



Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+
**Filter; P14+ who are employed or studying.*

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COMPUTER OWNERSHIP & USAGE

83% of Australians 65 and older use a Windows computer, while 40% in Paid Employment rely on computers at work.

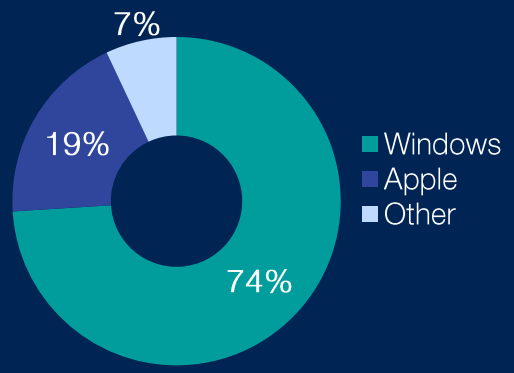
AVERAGE DEVICES

2.08
Average number of computers per household

1.13
Average number of computers per person

0.58*
Average owned by an employer or educational institutional

OPERATING SYSTEM

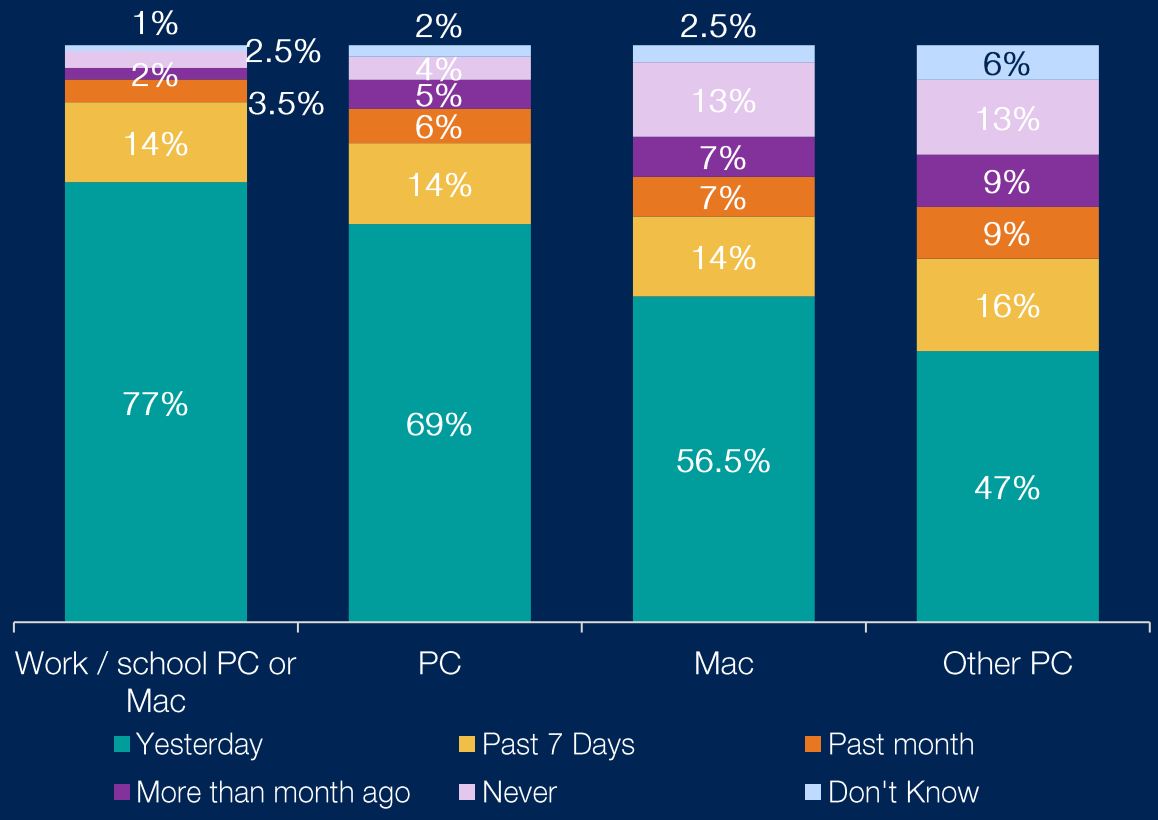


USAGE

40% in paid employment Australians use a computer at their workplace or educational setting (not in the home).

83% of 65 and older online Australians use a Windows PC

DEVICE RECENCY



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**Filter; P14+ who are employed or studying.*

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73% OF ONLINE AUSTRALIANS HAVE A SMART TV IN THE HOUSEHOLD

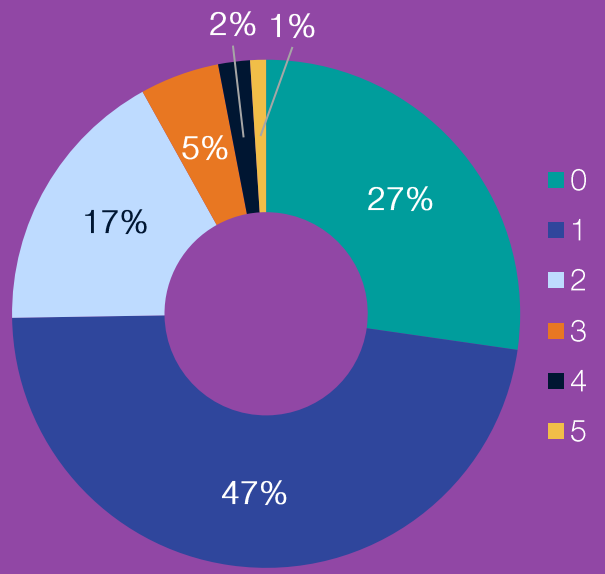
SMART TV OWNERSHIP

1.08

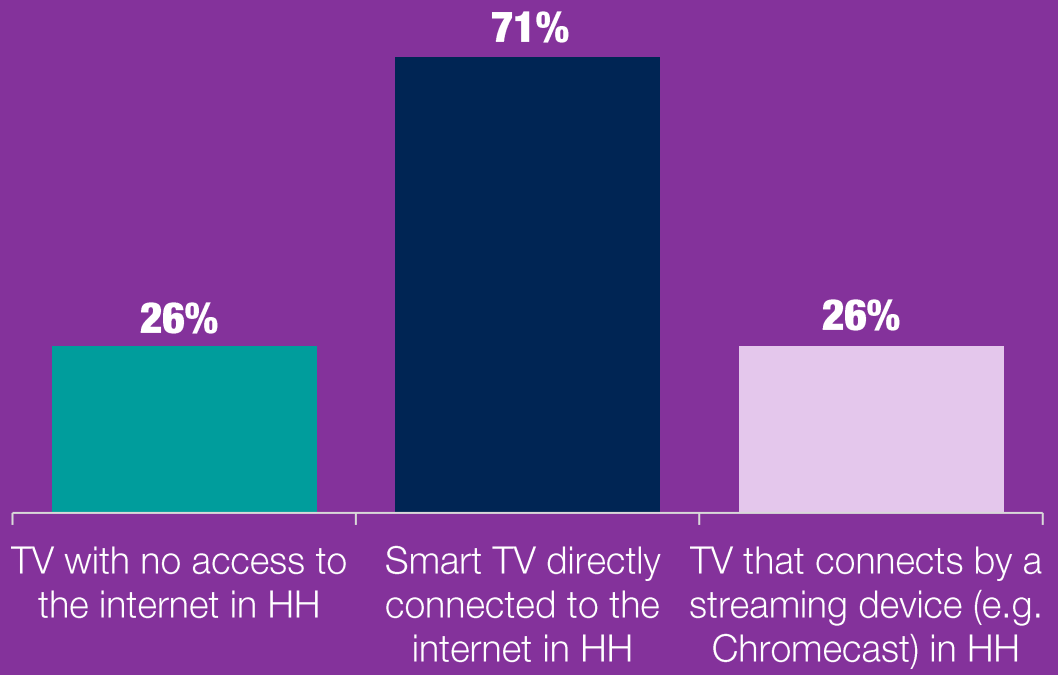
Average number of smart TVs per household

73% of online households have at least one smart TV in their home

NUMBER OF SMART TV'S IN ONLINE HOUSEHOLDS



SMART TV OWNERSHIP TOTAL HOUSEHOLDS



Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+
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IN ADDITION TO THE PRIMARY DEVICES IN THE HOUSEHOLD, STREAMING DEVICES, GAMING CONSOLES, AND SMART WATCHES ARE THE NEXT MOST COMMONLY OWNED.

OTHER DEVICES IN HOUSEHOLD

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

45% Of household own a smart home devices and a smart watch

26% Of NSW households have an internet connected set top box

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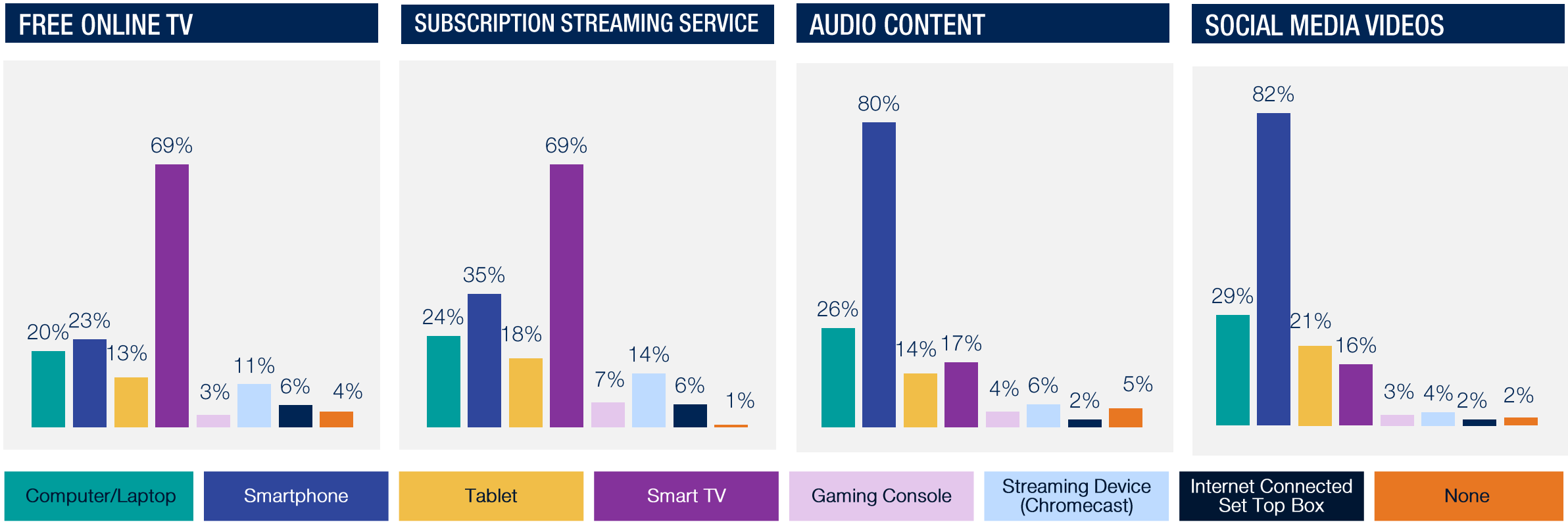
SMART TVs REMAIN THE MOST POPULAR DEVICES FOR SUBSCRIPTION STREAMING AND FREE ONLINE TV, WITH AUDIO AND SOCIAL MEDIA MOST CONSUMED WITH SMARTPHONES

DEVICES USED TO STREAM (LAST 7 DAYS)



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ONLINE MEDIA BEHAVIOUR

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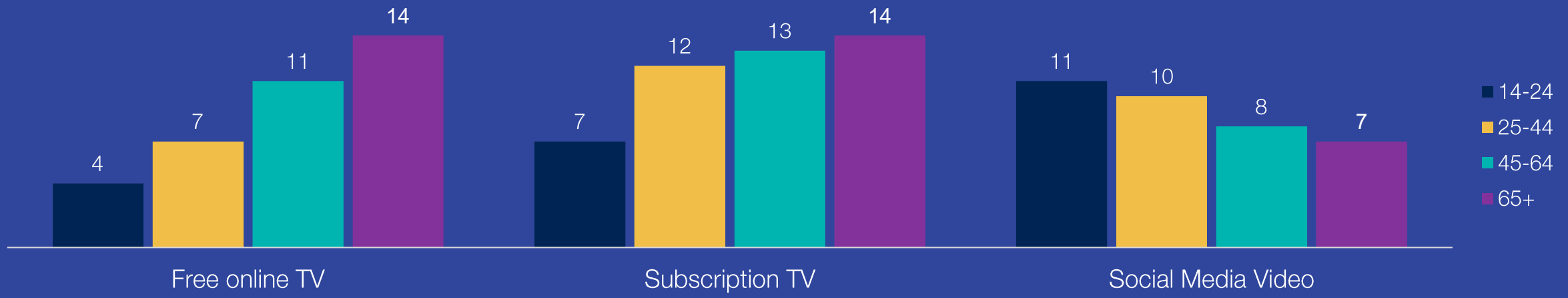
PEOPLE AGED 45 AND ABOVE STILL DEVOTE THE MOST TIME TO BOTH FREE ONLINE AND SUBSCRIPTION TV. PEOPLE AGED 14-24 SPEND THE MOST TIME WITH SOCIAL MEDIA VIDEO.

AVERAGE HOURS SPENT PER WEEK (CLAIMED) ON ANY DEVICE



20.6

Average number of hours Australians 14+ claim to spend watching free online TV, subscription TV or social media videos per week. Among all age groups, those aged 45 and over watch the most, averaging 21.3 hours per week, followed by those aged 25 – 44 with 21 hours per week and 17.8 hours for those aged14-24.

Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+
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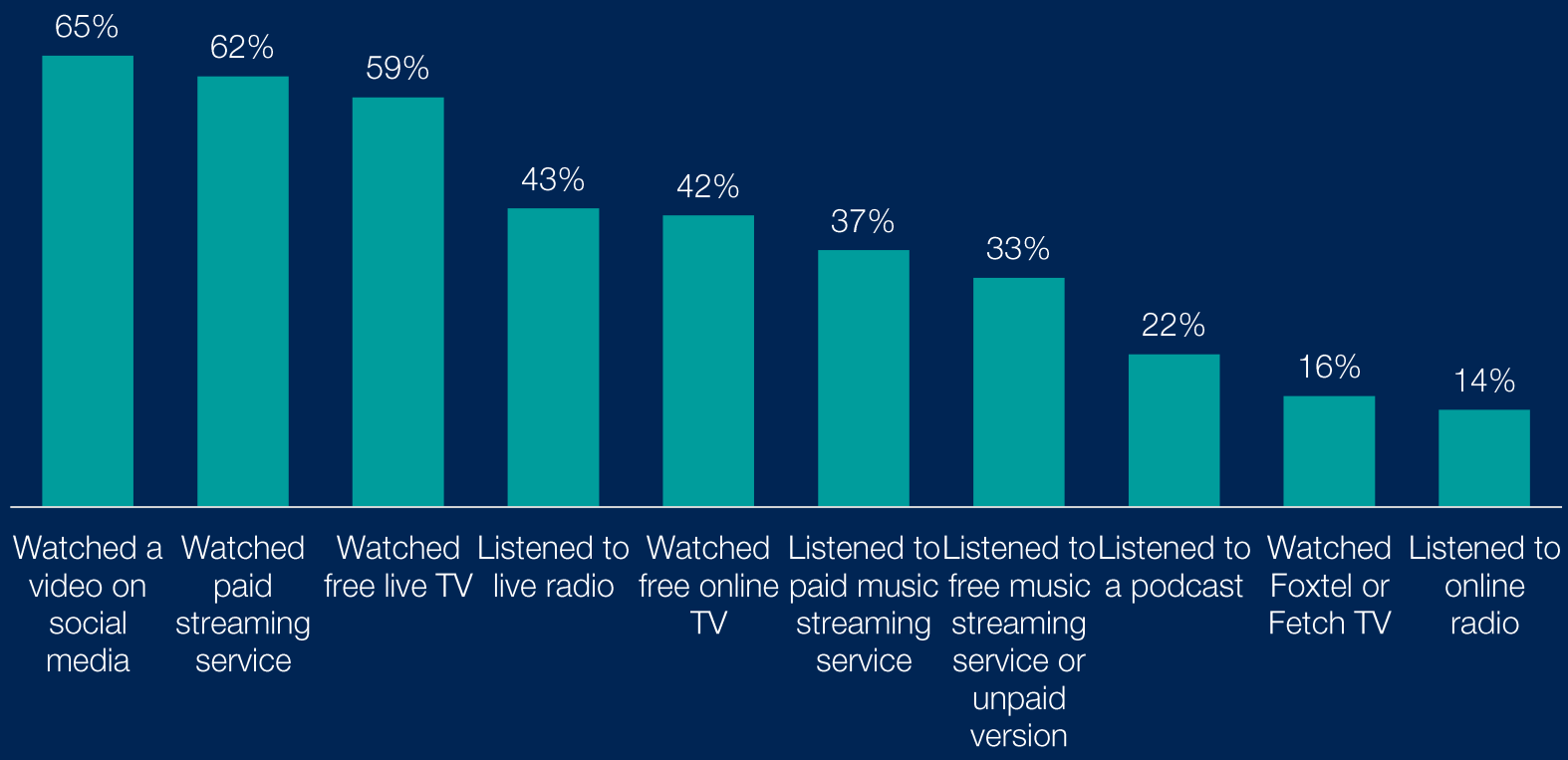
VIDEO ON SOCIAL MEDIA AND PAID STREAMING SERVICES HAVE BEEN THE MOST CONSUMED TYPES OF ONLINE MEDIA IN THE LAST 7 DAYS.

ONLINE MEDIA CONSUMPTION (L7D) ON ANY DEVICE

86%
Watched any video online in the past 7 days

66%
Listened to any audio online in the past 7 days



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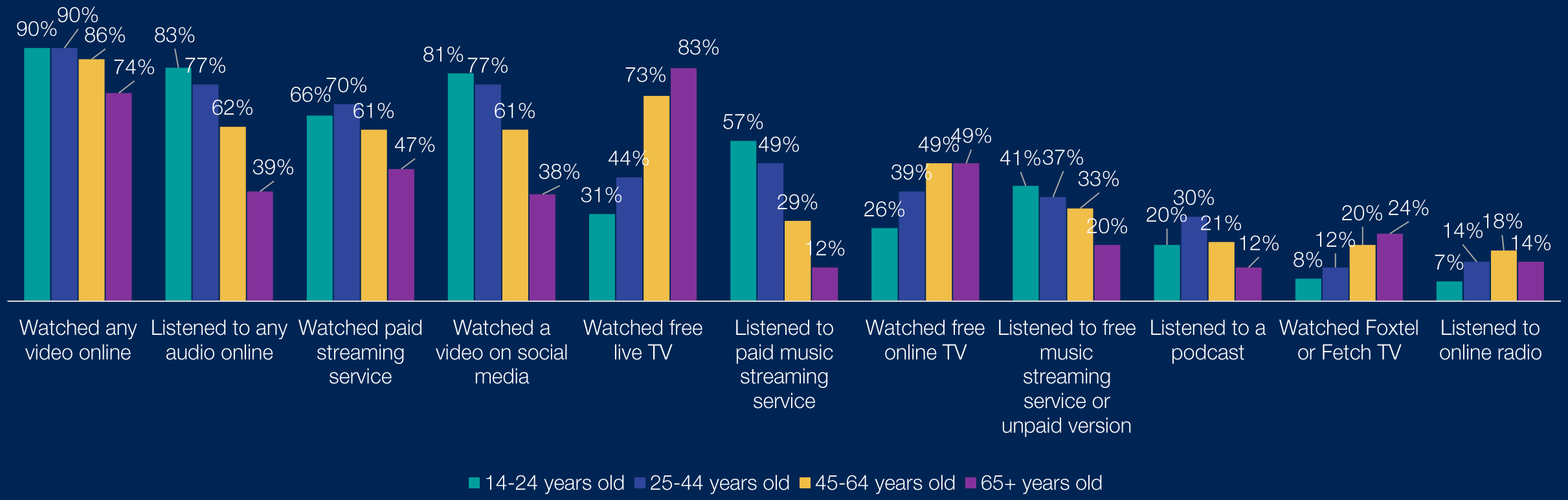
THOSE UNDER 44 ARE MORE LIKELY TO CONSUME SOCIAL MEDIA VIDEOS, WHEREAS THOSE AGED 45 AND ABOVE ARE MORE LIKELY TO HAVE WATCHED FREE ONLINE TV, LIKE BVOD.

ONLINE MEDIA CONSUMPTION BY AGE (L7D)



Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+

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KEY TAKEOUTS

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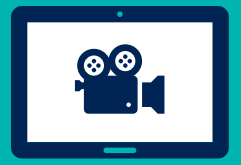
KEY TAKEOUTS September 2025

DEMOGRAPHICS DRIVE MOBILE O/S CHOICE

Smartphones are virtually universal with 98% of Australians using to access the internet in the last month.
52% of smartphone users are Apple iPhone, while 48% are Android users.
Over 35's are more likely to use Android smartphones.

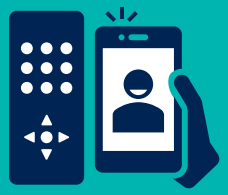
AUSTRALIANS ARE MULTI-DEVICE CONNECTED

Households 14+ average over 2.7 smartphones, 2.1 PCs, and 1.2 tablets (personal, business, or school).
Individually, 2.7 personal devices are owned per person, excluding Smart TVs



ONLINE VIDEO CONSUMPTION BY AGE

Online Australians 14+ spend approximately 20.6 hours watching free online TV, subscription TV or social media video per week.
14-24 spent 17.8 hours per week, while 65 and over spent 21.3 hours per week



VIDEO STREAMING IS MAINSTREAM AND GROWING

P65+ continue to spend the most amount of time consuming both free online & subscription TV.
14-24-year-olds are spending more time on social media content, with 90% streaming from smartphone.

Source: Ipsos iris Establishment Survey, September 2025, N=12,019 P14+
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SURVEY PROFILE

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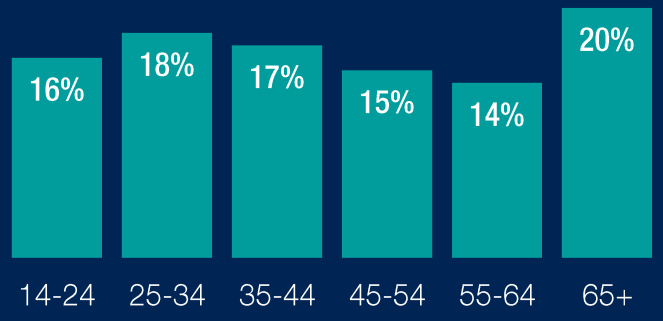
ESTABLISHMENT SURVEY PROFILE

22,514,000

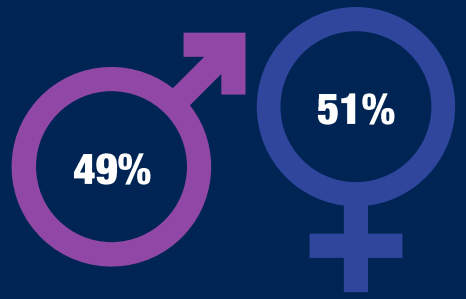
Total Internet Population*

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

AGE



GENDER

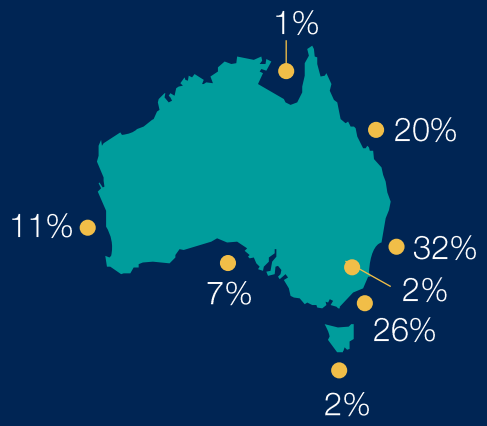


HH SIZE

17% 1 person

83% 2+ person

LOCATION



PROFILE

87% Grocery buyers

54% In paid employment

64% Live in metro areas (5 cap)

27% Tertiary educated

ETHNICITY

- Caucasian, 75%
- Asian (excl. Middle East), 14%
- Other ethnicities, 5%
- Aboriginal or Torres Strait Islander, 5%

Source: Ipsos iris Establishment Survey, September 2025, N=12, 019 P14+

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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.

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