

# DIGITAL LANDSCAPE REPORT

December 2025



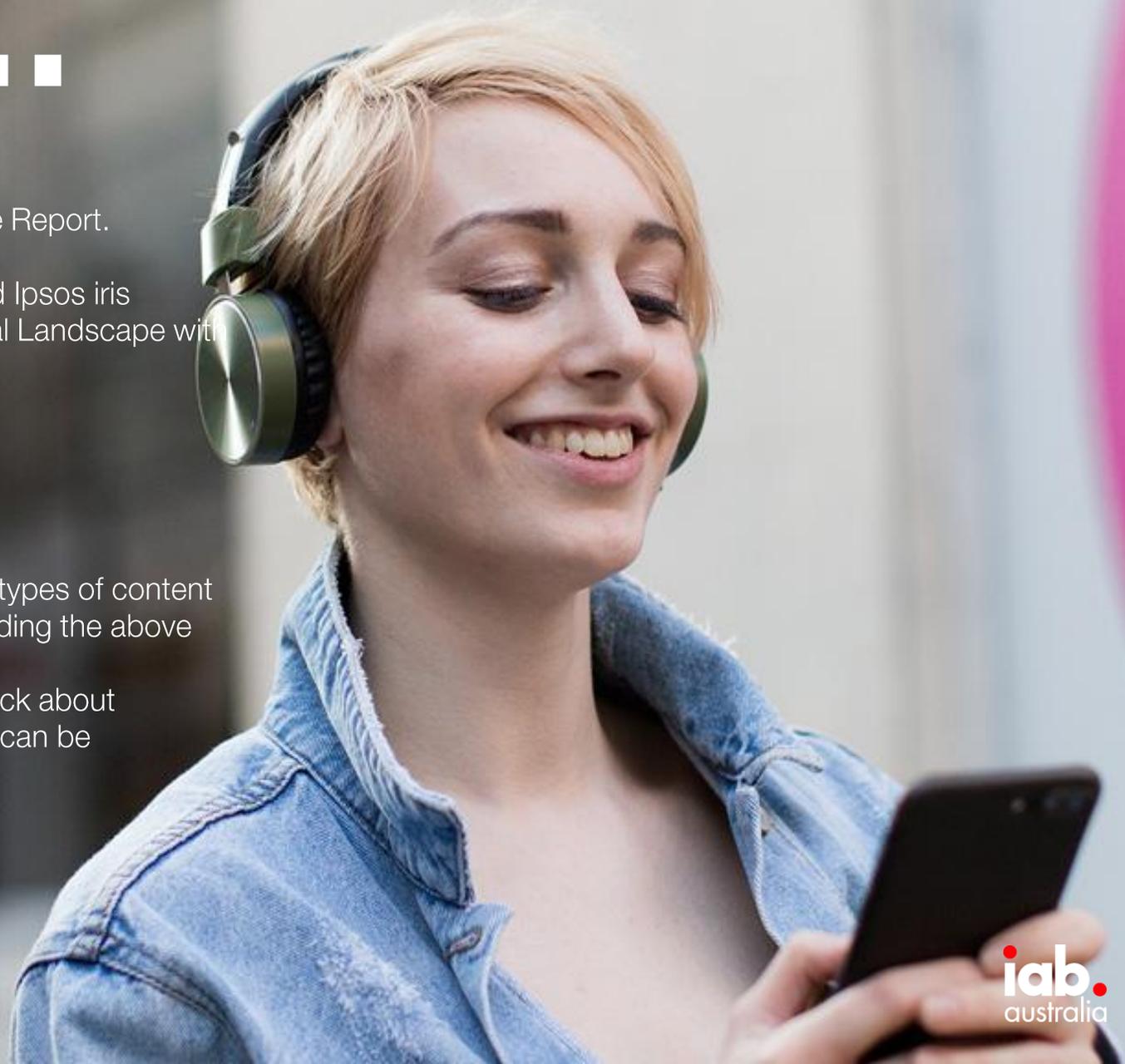
# WELCOME...

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](mailto:support-au@ipsos.com)



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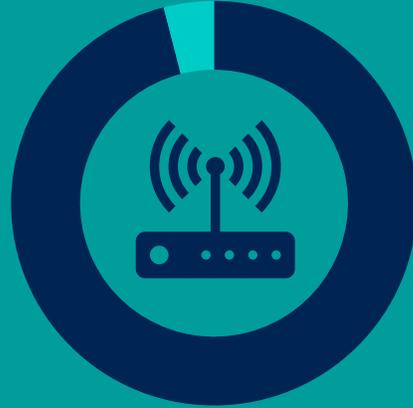
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# SNAPSHOT OF THE AUSTRALIAN ONLINE POPULATION 14+



## 22.57M

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

## 99%

Of people 35-44 years old were online at least once a month



## VIC

99% of Victorians aged 14+ were online in the last week

# ONLINE SNAPSHOT BETWEEN DEC 22 AND DEC 25, A 9.6% INCREASE

DEC-22

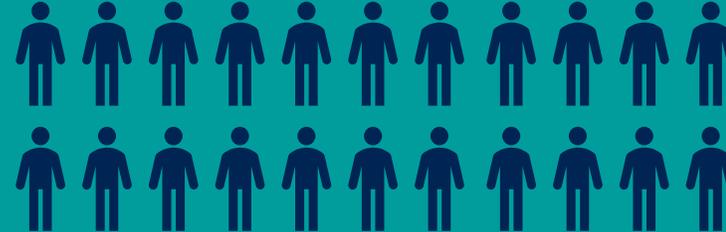


# 20.59M

Australians aged 14+ are online each month



DEC-25



# 22.57M

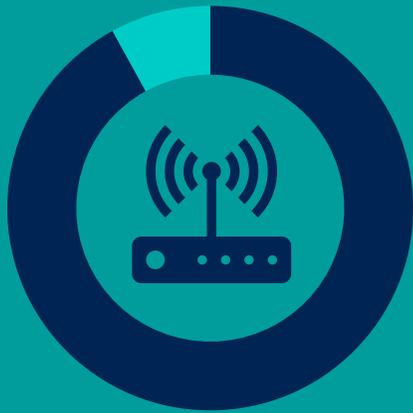
Australians aged 14+ are online each month



# FREQUENCY OF ONLINE USAGE CONTINUES TO GROW & NON-USERS ARE DECLINING IN 2025 VS. 2022

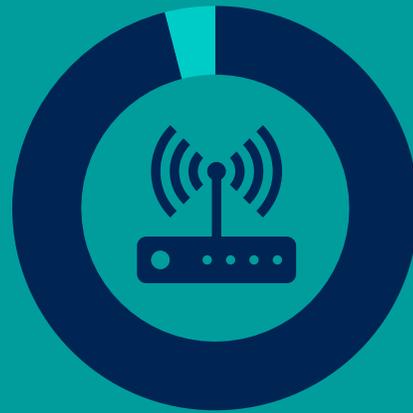
DEC-22

DEC-25



**92%**

Of the 14+ population were online yesterday



**96%**

Of the 14+ population were online yesterday



**78%**

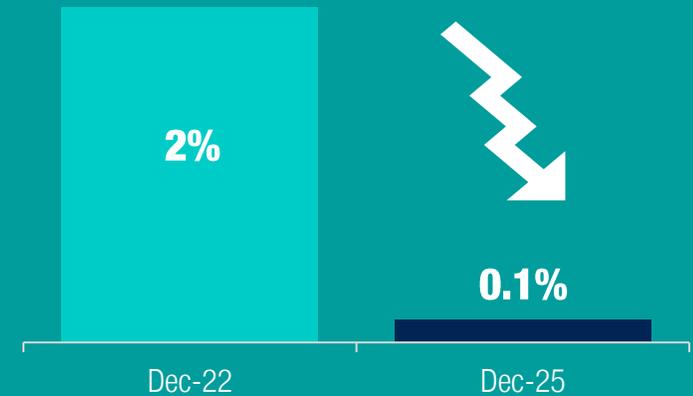
Are online more than once or twice a day



**87%**

Are online more than once or twice a day

Non-Users



People 14+ who have never been online

# DEVICE OWNERSHIP & USAGE

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# 22.34M PEOPLE 14+ OWN AT LEAST ONE SMARTPHONE FOR PERSONAL USE, WHILE THERE ARE 16.9M COMPUTERS AND 22.3M SMARTPHONES IN AUSTRALIAN HOUSEHOLDS

## PERSONALLY USED DEVICES

### NUMBER OF DEVICES



**25M**

Smartphones



**12.3M**

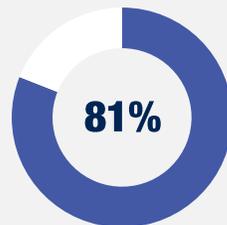
Tablets



**23.5M**

Computers

### USE PENETRATION



## DEVICES IN HOUSEHOLD

### NUMBER OF DEVICES



**22.3M**

Smartphones



**9.6M**

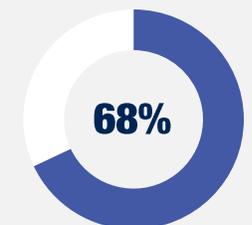
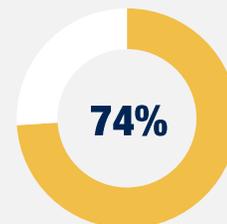
Tablets



**16.9M**

Computers

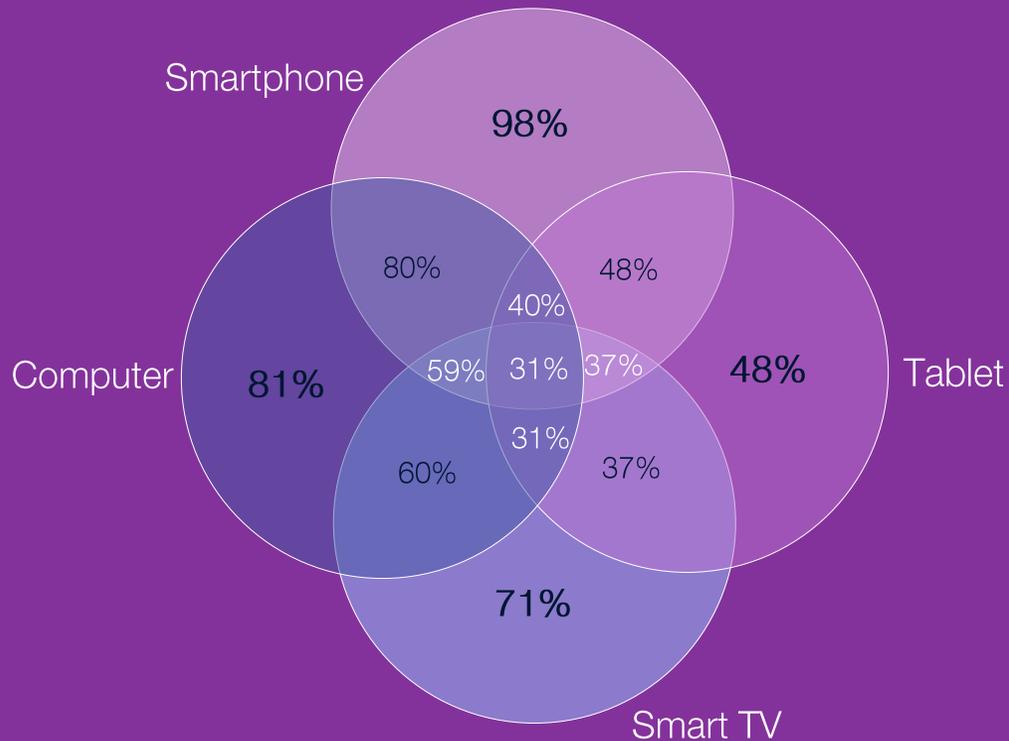
### USE PENETRATION



# 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

# SMARTPHONE OWNERSHIP & USAGE

55% of females are Apple iPhone users, while 55% of SA residents uses Android smartphones.

## AVERAGE DEVICES

2.74

 Average number of smartphones per household

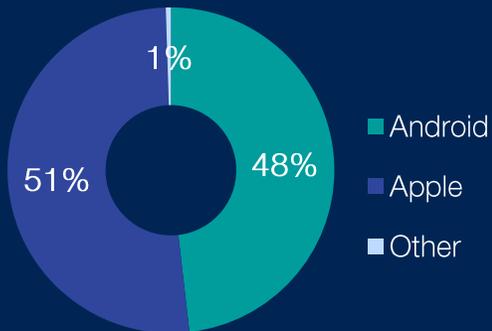
1.11

 Average number of smartphones per person

0.37\*

 Average owned by an employer or educational institutional

## OPERATING SYSTEM



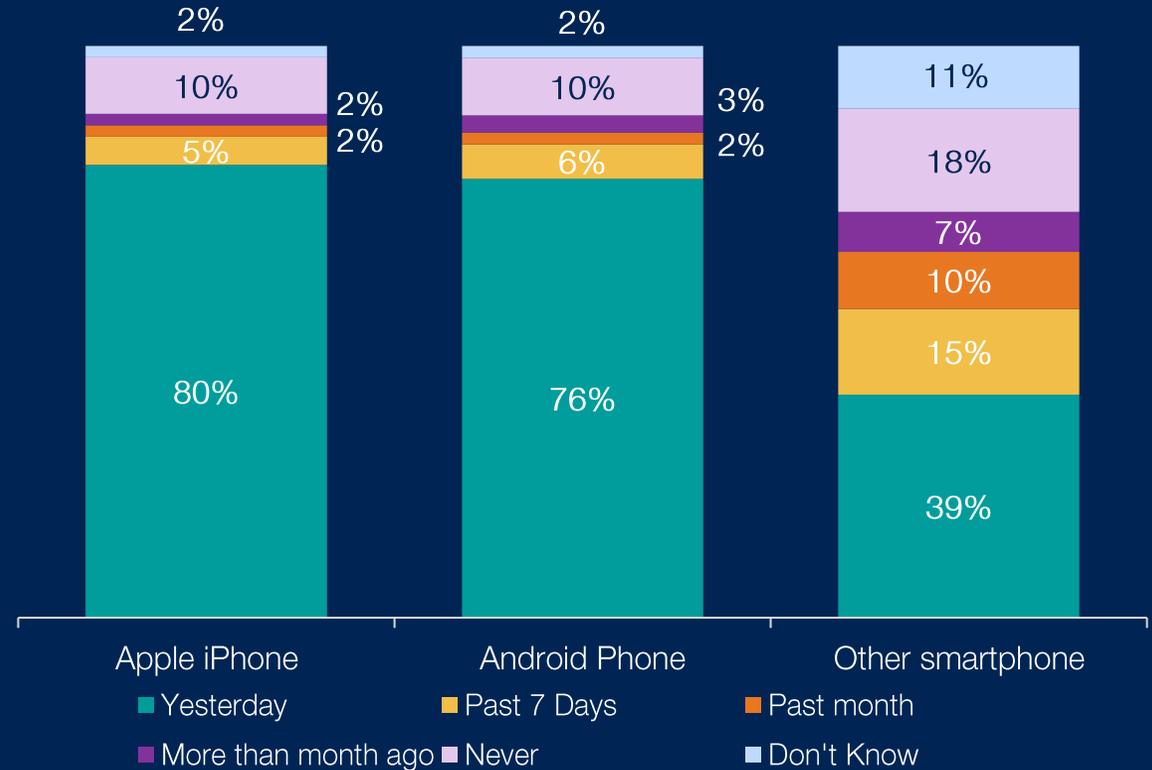
## USAGE

 People aged 18 to 24 are most inclined to use Apple smartphones with 74% choosing iPhone.

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

 Northern Territorians have the highest average number of smartphones in the HH at 2.89

## DEVICE REGENCY



Source: Ipsos iris Establishment Survey, December 2025, N=12,009 P14+

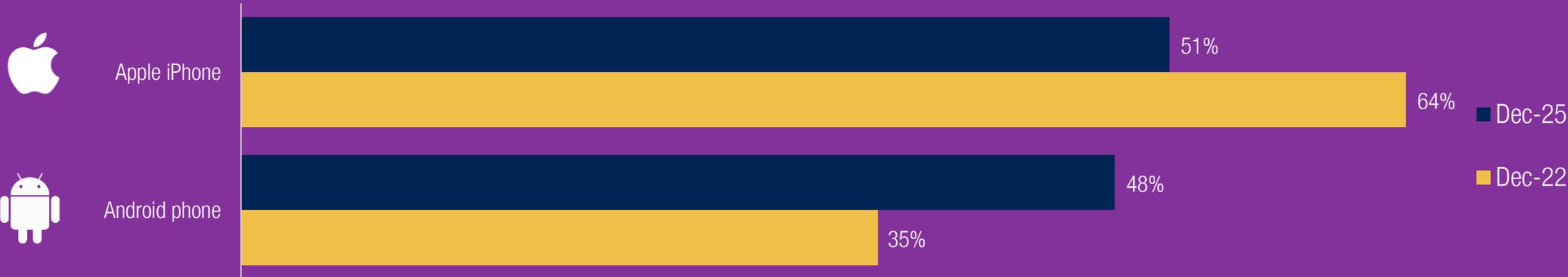
\*Filter; P14+ who are employed or studying.

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# MOBILE OWNERSHIP INCREASED STRONGLY FROM 23.3M TO 25M DEVICES, ANDROID UPTAKE INCREASED BY 13 PERCENTAGE POINTS (PPT)

## SMARTPHONE OS Dec 25 vs Dec 22

Smartphone Operating system 14+

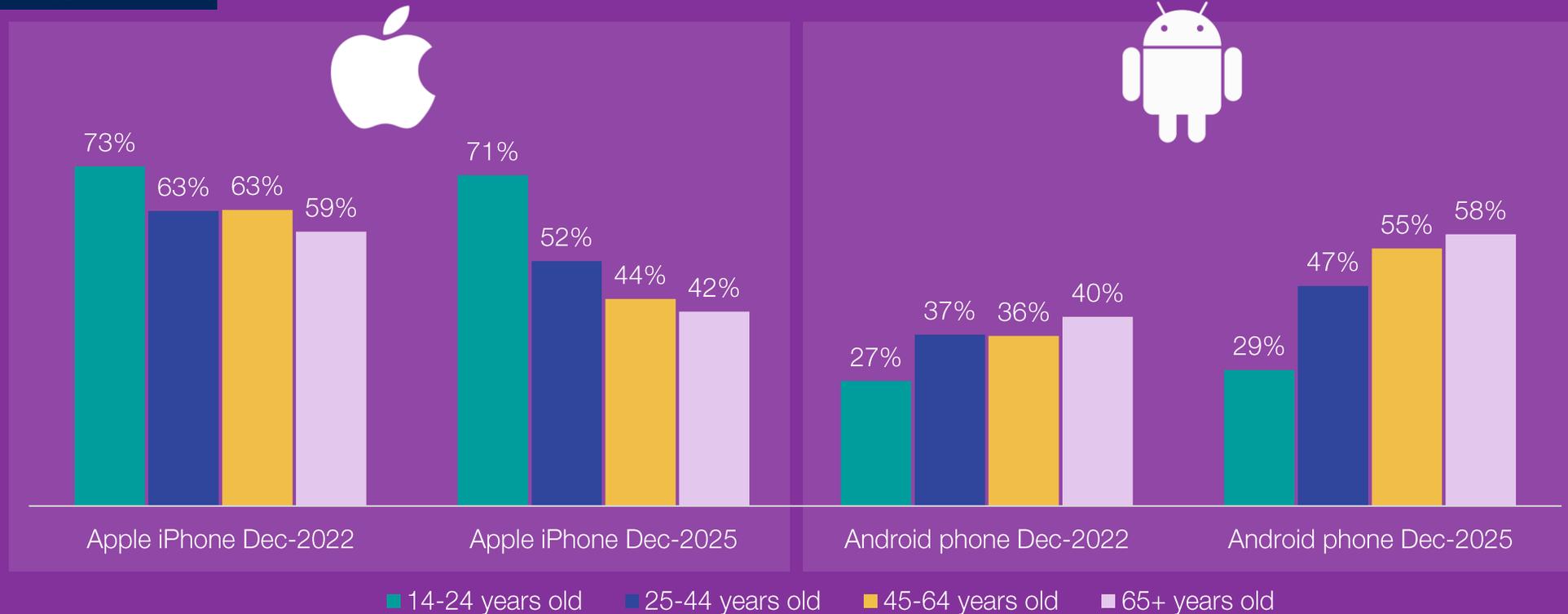


Apple iOS ownership has declined by 13ppt, while Android has gained 13ppt.

Android has closed the ownership gap down to 3ppt, a major shift from three years ago when Apple had a 29ppt advantage over Android.

# MOBILE OWNERSHIP TREND CHANGE BY AGE

## SMARTPHONE OS



Most Android gains were recorded by 45 and over, 45-64s grew by 19ppt and 65 and over, which grew by 18ppt compared with three years ago.

14–24-year-olds prefers or uses the Apple iPhone, only dropping 2ppt compared with three years ago. 25 and over all saw a reduction in Apple ownership.

# 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

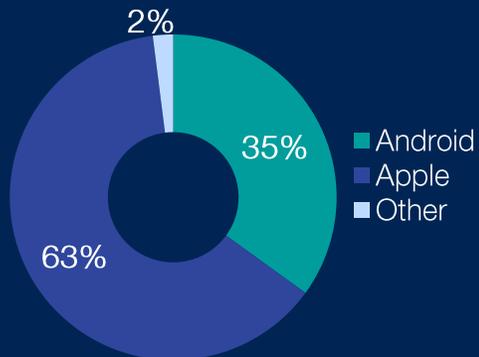
**0.72**

 Average number of tablets per person

**0.38\***

 Average owned by an employer or educational institutional

## OPERATING SYSTEM

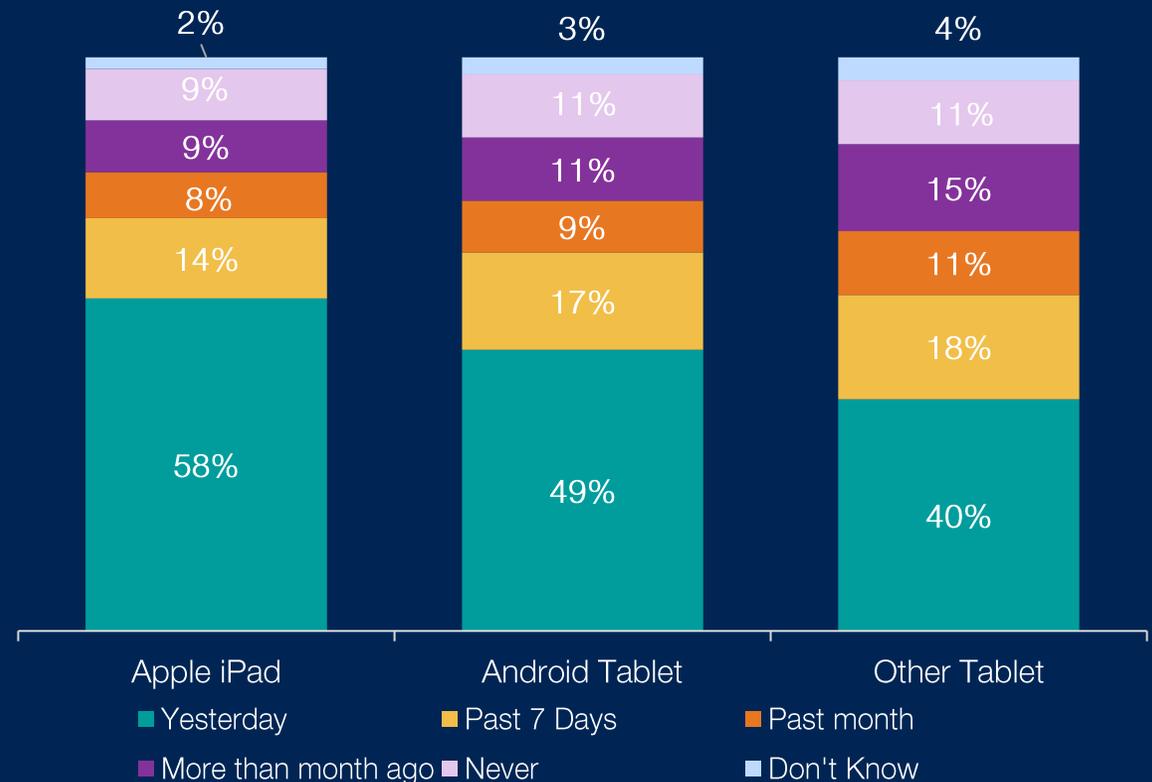


## USAGE

 Android tablet users are likely to be from Regional areas at 39.5% compared to Metro areas at 33%

 18-24s are heavy users of Apple iPads at 79% compared with Android tablet at 19%

## DEVICE REGENCY



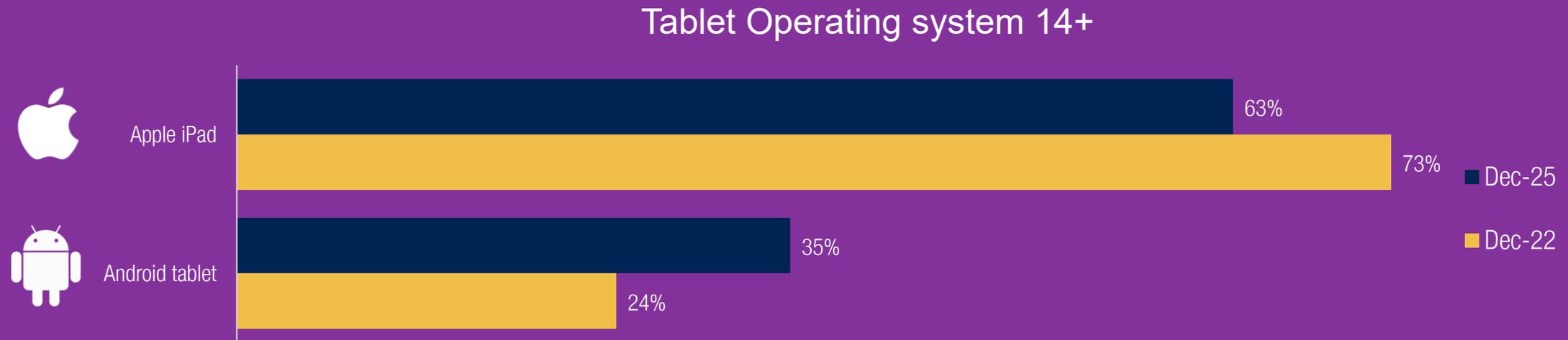
Source: Ipsos iris Establishment Survey, December 2025, N=12,009 P14+

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

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# TABLET OWNERSHIP INCREASED 3PPT, ANDROID UPTAKE INCREASE BY OVER 11PPT

TABLET OS Dec 25 vs Dec 22



Apple iPad declined by 10ppt, while Android tablet has gained 11ppt during the same period.

Similar with smartphone ownership, Apples loss was picked up by Android, but the gap difference in December 25 is still at 28ppt advantage for Apple iPad.

# COMPUTER OWNERSHIP & USAGE

79% of Tasmanians use a Windows PC, while 39% in Paid Employment rely on computers at work.

## AVERAGE DEVICES

**2.09**

 Average number of computers per household

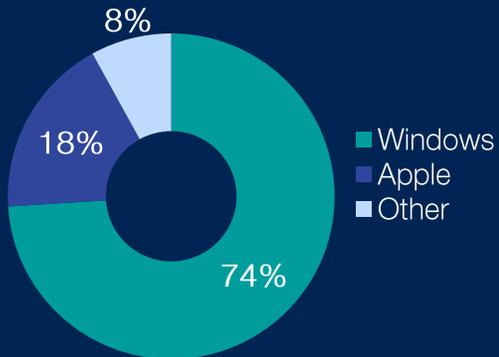
**1.13**

 Average number of computers per person

**0.58\***

 Average owned by an employer or educational institutional

## OPERATING SYSTEM

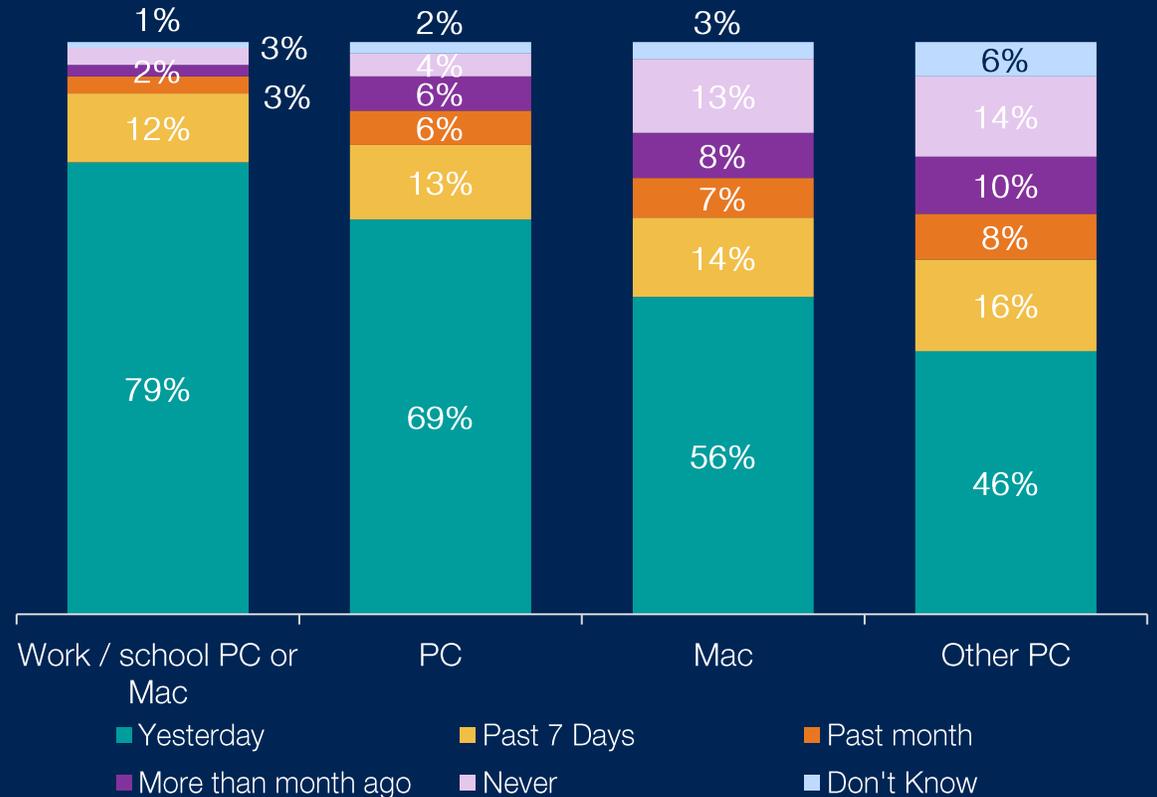


## USAGE

 39% in paid employment Australians use a computer at their workplace or educational setting (not in the home).

 84% of 65 and older online Australians use a Windows PC

## DEVICE REGENCY



Source: Ipsos iris Establishment Survey, December 2025, N=12,009 P14+

\*Filter: P14+ who are employed or studying.

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# WINDOWS PC OWNERSHIP INCREASED BY 3PPT

PC/LAPTOP OS Dec 25 vs Dec 22

Computer/Laptop Operating system 14+



Apple Mac ownership has declined by 3ppt, while Windows PC has gained by 3ppt.

# 72% OF ONLINE AUSTRALIANS HAVE A SMART TV IN THE HOUSEHOLD, AND 25% OWN MULTIPLE SMART TVS

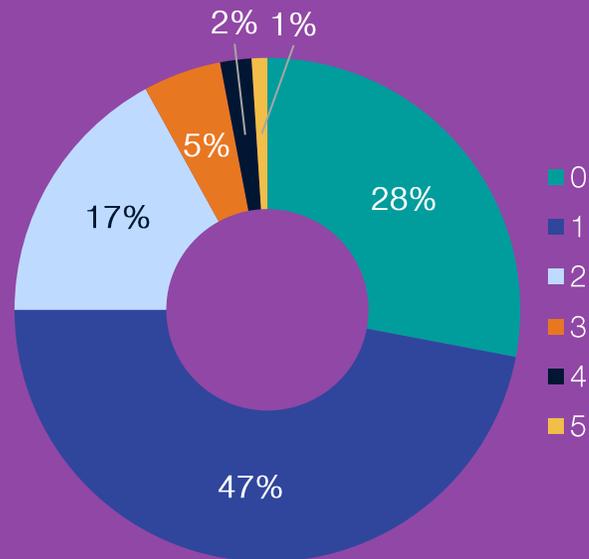
## SMART TV OWNERSHIP

# 1.08

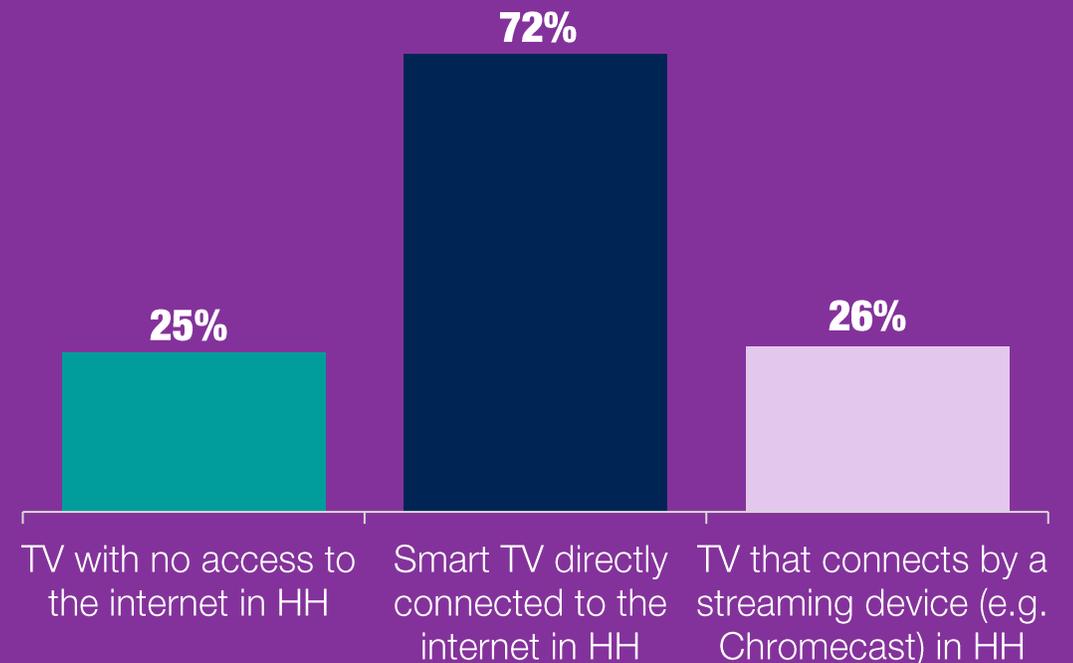
Average number of smart TVs per household

47% of online households have at least 1 smart TV in their home

NUMBER OF SMART TV'S IN ONLINE HOUSEHOLDS



SMART TV OWNERSHIP TOTAL HOUSEHOLDS



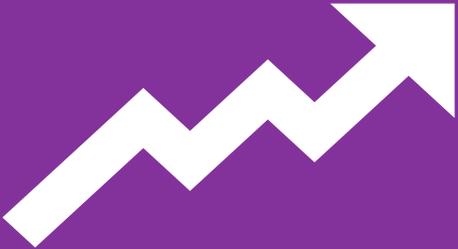
# CONNECTED TV OWNERSHIP INCREASED DEC 22 vs. DEC 25, AN INCREASE OF 4.4PPT

## CONNECTED TV

DEC-22

66.5%

Australians aged 14+



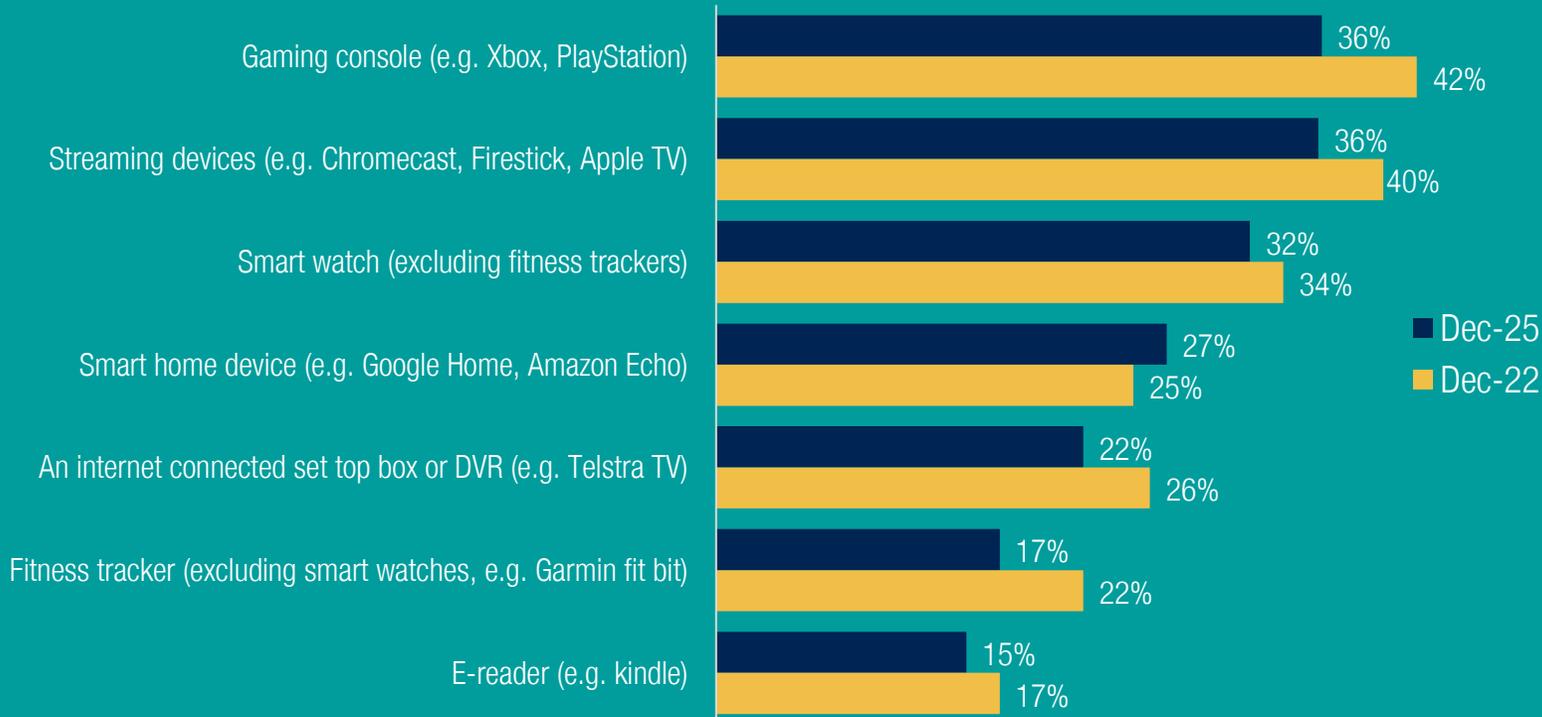
DEC-25

70.9%

Australians aged 14+

# OTHER DEVICES HAVE DECLINED WITH THE EXCEPTION OF SMART HOME DEVICES LIKE GOOGLE HOME AND AMAZON ECHO

## OTHER DEVICES IN HOUSEHOLD



**-6%**

PPT decline in Gaming console ownership compared with Dec 2022

**-5%**

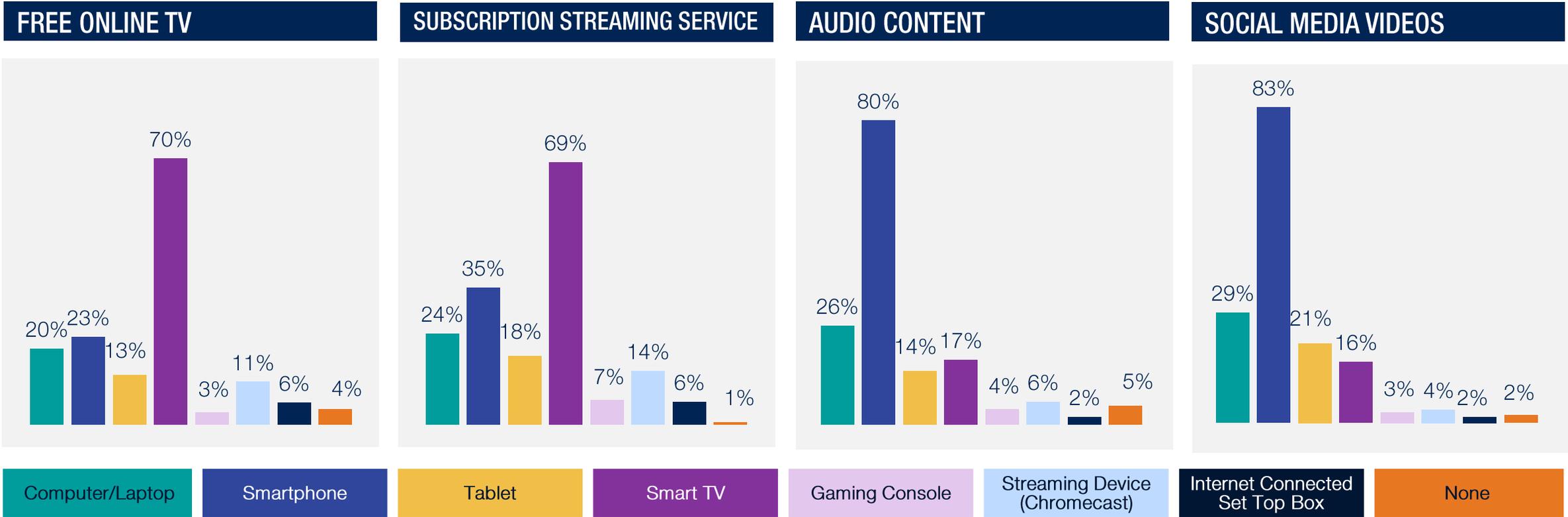
PPT decline in Fitness tracker ownership compared with Dec 2022

**+2%**

PPT increase Smart home device ownership compared with Dec 2022

# 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)



# SMARTPHONE STREAMING OF SUBSCRIPTION VIDEO BY AUSTRALIANS AGED 35 AND OVER SAW A 5.6PPT INCREASE

DEVICES USED TO STREAM SUBSCRIPTION VIDEO (LAST 7 DAYS) - SMARTPHONE

DEC-22

21.8%

Australians aged 35+



DEC-25

27.4%

Australians aged 35+

# 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 DEC 25

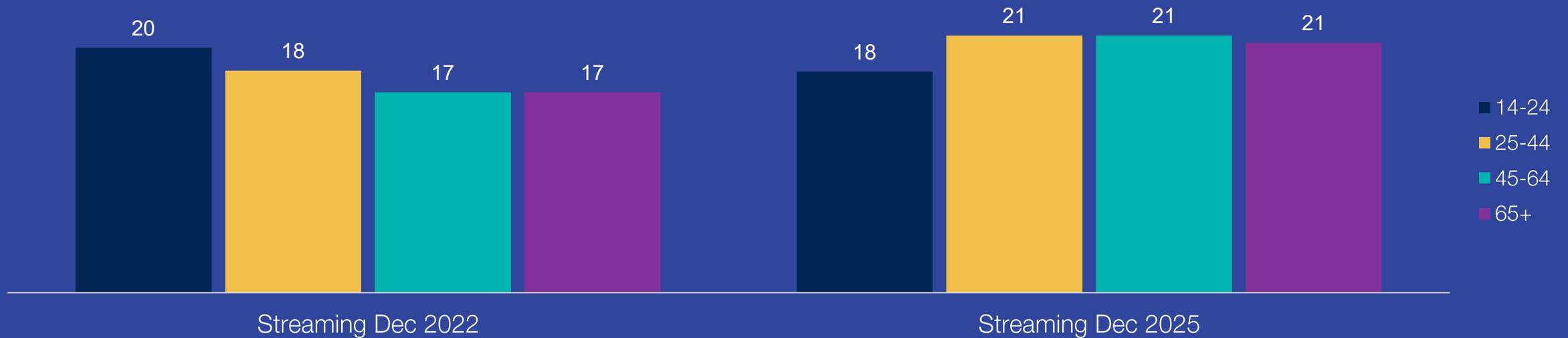


# 20.7

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 25-64 watch the most, averaging 21.3 hours per week, followed by those aged 65 and over with 20.7 hours per week and 18.3 hours for those aged 14-24.

# AVERAGE HOURS SPENT PER WEEK BY AGE

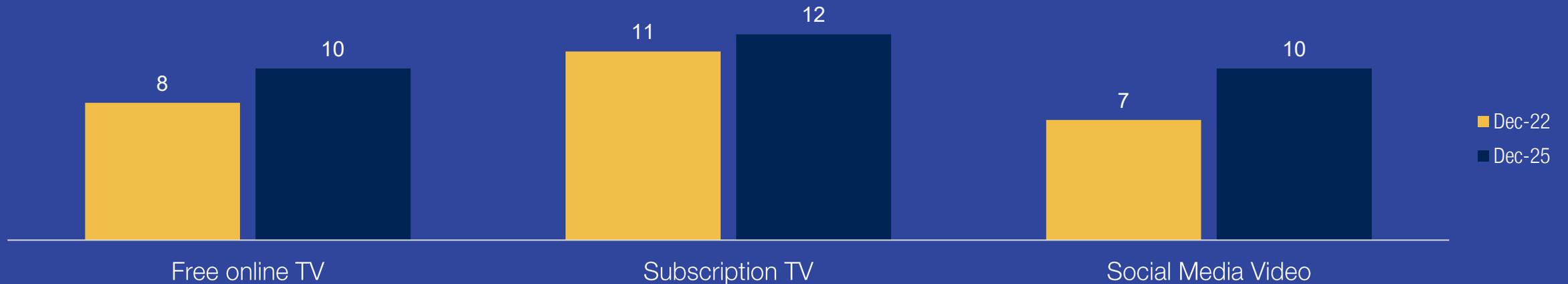
## AVERAGE HOURS SPENT PER WEEK (CLAIMED) ON ANY DEVICE DEC 22 VS DEC 25



Average number of hours Australians 14+ claim to spend watching free online TV, subscription TV or social media videos per week have increased by 10 hours. 14-24 groups claimed reduction in streaming hours by 2 hours, while those aged 25 and over all claimed increase in streaming hours per week by 3 hours.

# DECEMBER 2022 VS DECEMBER 2025 AVERAGE HOURS SPENT ON STREAMING VIDEO

AVERAGE HOURS SPENT PER WEEK (CLAIMED)

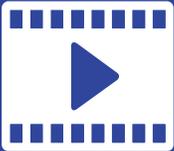


Average number of hours Australians 14+ claim to spend watching free online TV, subscription TV or social media videos per week on any device increased, up 2 hours on Free online TV, up 1 hour in Subscription streaming services and 3 hours on Social media videos per week.

# THERE HAS BEEN A 2.7 HOUR OR 15% INCREASE IN AUSTRALIANS AGED 14+ WATCHING VIDEO ON ANY PLATFORM

AVERAGE HOURS SPENT (CLAIMED) L7D Dec 22 vs Dec 25

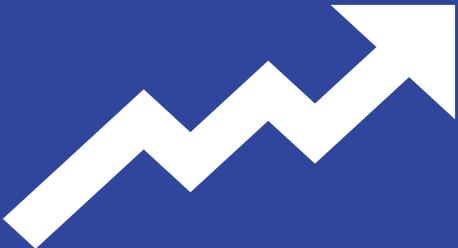
DEC-22



DEC-25

18.0 hrs

Australians aged 14+



20.7hrs

Australians aged 14+

# WEEKLY REACH OF PAID STREAMING SERVICES DECLINED, FREE ONLINE TV HAVE GAINED COMPARED WITH FREE LIVE TV

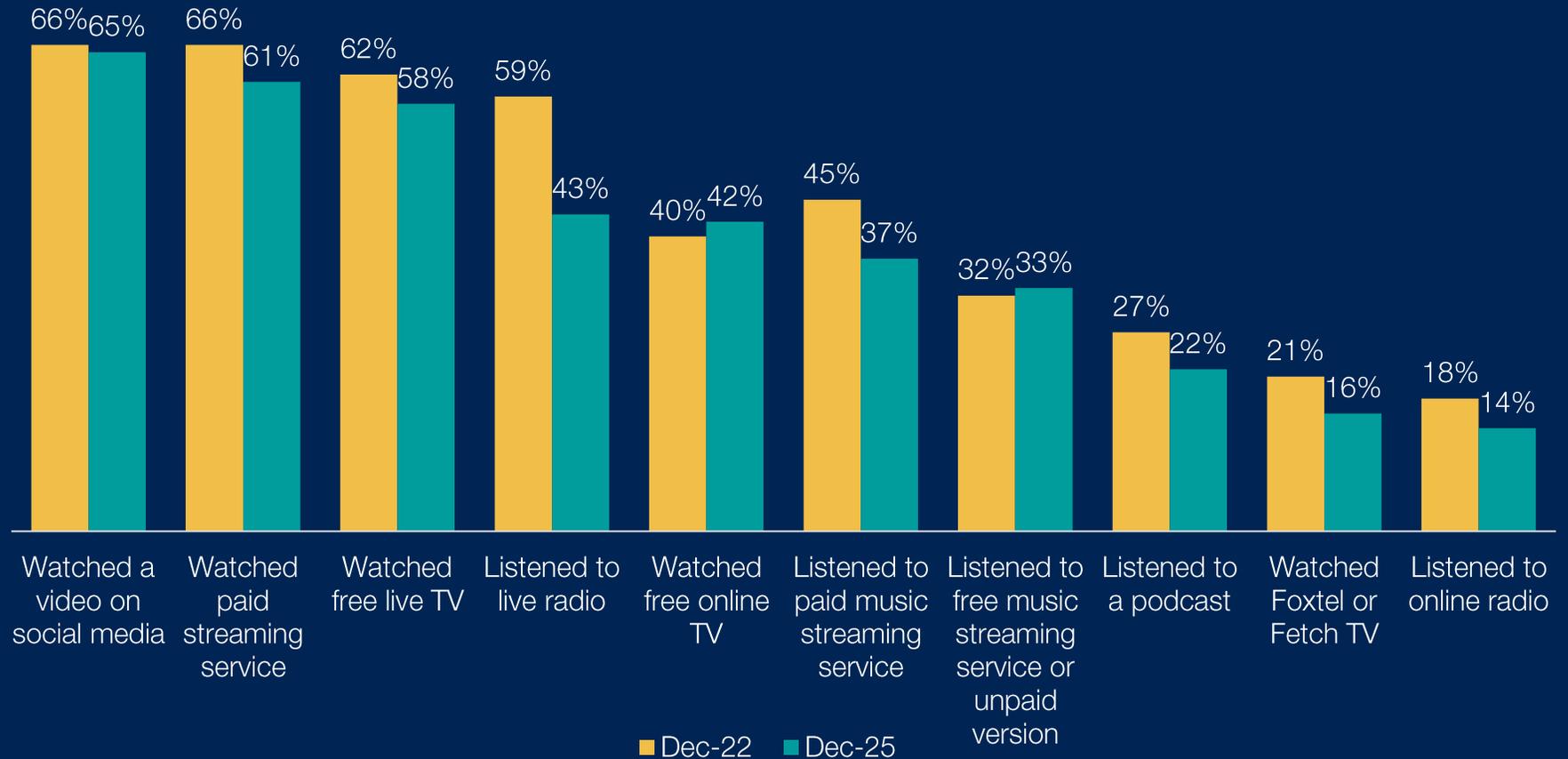
## ONLINE MEDIA CONSUMPTION (L7D) ON ANY DEVICE

**85%**

Watched any video online in the past 7 days

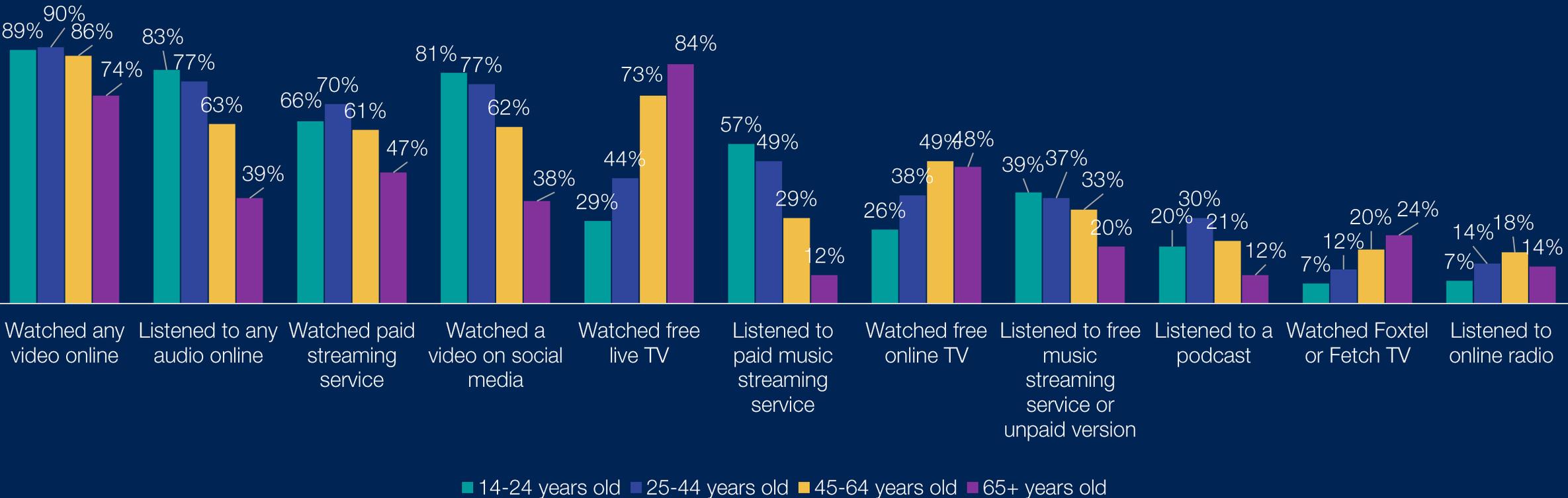
**66%**

Listened to any audio online in the past 7 days



# 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)**

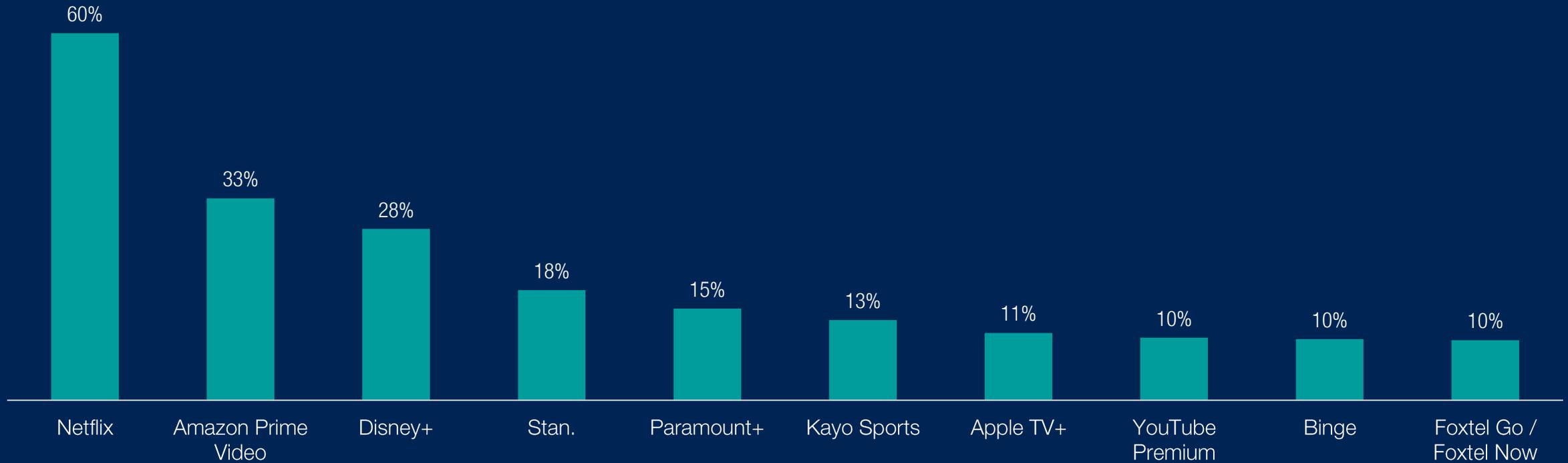


■ 14-24 years old ■ 25-44 years old ■ 45-64 years old ■ 65+ years old

# NETFLIX DOMINATES LAST 30-DAY USAGE OF SVOD SERVICES

PAID STREAMING CONSUMPTION 14+ YEARS OLD (L30D Claimed)\*

■ Dec-25



# KEY TAKEOUTS

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# KEY TAKEOUTS DECEMBER 2025 VS. DECEMBER 2022



## DEMOGRAPHICS DRIVE MOBILE O/S CHOICE

Smartphones are virtually universal with 98% of Australians 14+ using to access the internet in the last month compared with 95% three years ago. Android ownership has gained over 13 percentage points from 35% to 48% at the expense of Apple iPhone ownership.



## MORE AUSTRALIANS ARE CONNECTED

96% of 14+ were online yesterday, compared with 92% three years ago. 87% of those were online multiple times a day compared with 78% three years ago. This trend is mirrored by device ownership, as the average number of smartphones per household has risen from 2.58 to 2.74.



## CLAIMED ONLINE VIDEO CONSUMPTION BY AGE

Online Australians 14+ spend on average 20.7 hours watching free online TV, subscription TV or social media video per week, compared with 18 hours three years ago. In contrast, the time spent by individuals aged 14-24 has decreased. This group now spends 18.3 hours per week on these activities, down from 20.3 hours per week three years prior.



## VIDEO STREAMING IS MAINSTREAM AND GROWING

P65+ continue to spend the most time consuming both free online & subscription TV. 14-24-year-olds are spending less time streaming subscription service, a reduction of over 18% from three years ago from 9 hours down to 7.3 hours.

# KEY TAKEOUTS DECEMBER 2025 VS. DECEMBER 2022 CONTINUED



## MUSIC STREAMING DECLINE OR FLAT

Usage of most music and audio services has declined. Listening to live radio decreased by 16ppt, podcast listening fell by 5ppt, and paid music streaming services saw an 8ppt drop. In contrast, free music streaming services were the only category to experience growth, with a 1ppt increase.



## CONNECTED TV OWNERSHIP INCREASE

Connected TV ownership in household has increased from 66.5% to 70.9%, or 4.4ppt increase. The average number of connected TVs per online Australian household increased slightly from 1.07 to 1.08.



## OTHER DEVICES IN HOUSEHOLD ESTABLISHED

Ownership of several connected devices has declined, with gaming consoles decreasing by 6ppt and fitness trackers by 5ppt. In contrast, smart home devices like Google Home and Amazon Echo were the only category to see growth, increasing by 2ppt.



## CONSUMPTION OF PAID SERVICE DECLINE

Consumption of paid streaming services has declined, likely due to cost-of-living issues impacting Australians. Specifically, general paid streaming is down by 5ppt, paid music streaming has fallen by 8ppt, and subscription TV services like Foxtel and Fetch have decreased by 5ppt.

# SURVEY PROFILE

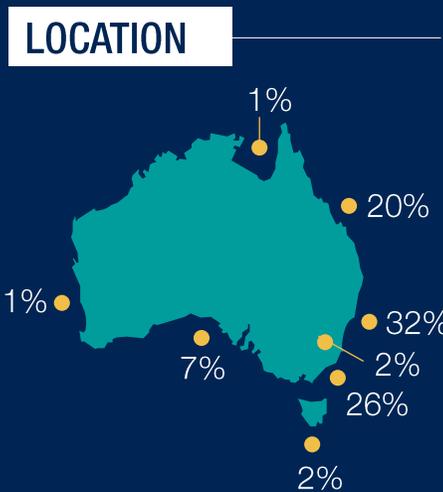
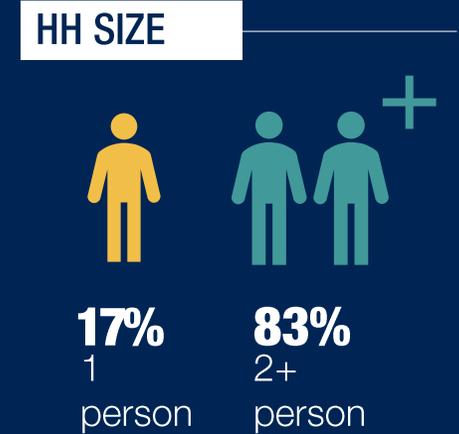
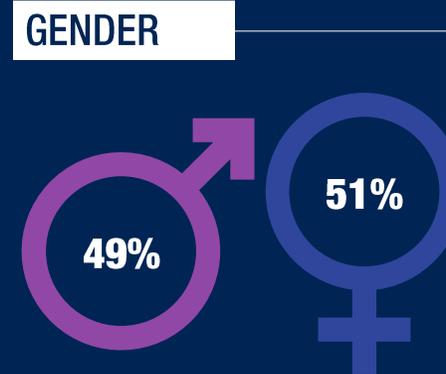
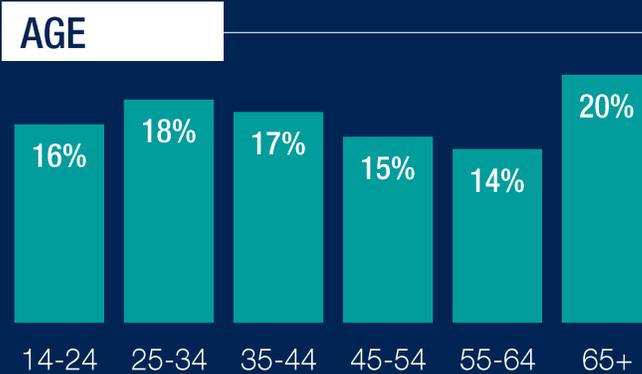
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# ESTABLISHMENT SURVEY PROFILE DECEMBER 2025

## 22,577,000

### Total Internet Population\*

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



# 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.



