

2022 Inside Australian Online Shopping

eCommerce Industry Report



About this report

Welcome to the seventh edition of the Inside Australian Online Shopping Industry Report, an in-depth study into consumer online buying behaviour and trends.

The report has been prepared using 2019, 2020 and 2021 delivery data recorded by the Australia Post Group, unless otherwise stated.

Commentary in this report relating to online shopping is based on actual year-on-year growth numbers or an extrapolation of this data.



Foreword

5 April 2022

Welcome to the 2022 Australia Post eCommerce Industry report.

While some had predicted 2021 to be a year of greater stability, what ensued instead was a year with fresh challenges and continued disruption as a result of the COVID-19 pandemic, cementing the fundamental shift in the way we live, work and shop and further accelerating the growth in eCommerce.

Across the year, more than 80% of Australian households purchased something online, driving national year-on-year growth to 12.3%. While growth was more subdued in comparison to 2020, it was at a level almost double the pre-pandemic baseline.

Right across the 2021 calendar year Australians turned to online shopping like never before. Australians spent a record \$62.3 billion online for the year¹, with online accounting for 19.3% of total retail spend.²

While the growth over the last two years has been significant and brought Australia closer to where many of the global eCommerce leaders were pre-pandemic, we still lag not just in terms of online spend, but on other metrics such as purchase frequency too. For example, in South Korea more than half (53%) of all online shoppers are buying at least weekly on average, more than double Australia's figure of 25%.³ It means that there

remains significant growth still to come for the Australian market.

With fluctuating restrictions and 15 million people in lockdown at one point during the year, Australia Post's role in keeping people connected to each other and the things they needed was never more important – particularly for those in rural and remote Australia – with the role of the local Post Office as a community hub never more apparent.

The pivot to online shopping over the last two years also enabled us to be an important lifeline for small to medium businesses, supported by our more than 4300-strong Post Office network, and our MyPost Business platform playing a central role in supporting these businesses to find new ways to reach their customer and grow online.

The rapid eCommerce growth we've seen over the last two years is beginning to stabilise but shoppers' confidence and comfort with buying online will only continue to increase.

While year-on-year growth will fall back in line with the natural growth we saw prior to the pandemic, the overall trajectory for the years ahead will continue to trend upwards.

To ensure we can stay ahead of this growth – and support Australian retailers to do the same – our strong network investment continues at pace,

and we have committed an additional \$400 million by mid-2022 in new parcel facilities, fleet, and technology, bringing our total committed investment to more than \$1 billion over three years.

This will help service the growing demand for parcel services, improve the data and information we provide to our customers and most importantly improve the environmental sustainability of our operations – something which we know is critically important not only for our business, but also for the customers and communities we serve.

As we look to the year ahead, I trust that retailers and business owners can use the rich data and insights contained within this report to inform their strategy and planning.

The future is bright for Australian eCommerce, and the entire Australia Post team is committed to partnering with our customers every step of the way.

Be safe, be kind.



Paul Graham

Group Chief
Executive Officer and
Managing Director

Australia Post

Executive summary

With 9.2 million Australian households shopping online, it's evident the pandemic has changed the way we shop, and new habits formed over the past two years are now firmly ingrained.

eCommerce in 2021 started strongly, a trend that continued across the calendar year with an average of 5.4 million households buying online each month – an increase of 39 per cent from 2019.

While the year-on-year growth rate experienced distinct peaks and troughs correlating with restrictions, the associated fluctuations in household participation were less pronounced – indicative of the enduring shift in behaviour with shoppers increasingly preferring online channels for their shopping needs.

When we look closer at who is buying online, four distinct groups emerge: Occasional Shoppers, Active Shoppers, Very Active Shoppers and Super Shoppers.

Despite Super Shoppers accounting for just 1.4 of the 9.2 million households buying online, they account for around half of all online purchases. By comparison, Occasional Shoppers, and Active Shoppers represent more than half of all shoppers, but fewer than 20 per cent of purchase volume.

But what does this mean for retailers as they navigate 2022?

First, a great end-to-end customer experience is paramount to growing and maintaining a loyal customer base.

Retailers need to know every detail of their products and provide thorough information, supported by images, video, or even virtual reality. A variety of payment options, competitive shipping and a range of delivery choices are also essential, providing customers with the flexibility they're seeking.

But just as important is what happens after the customer receives their parcel. Post-purchase support and a competitive returns policy are paramount, as is creating an avenue for your customers to share their experiences – positive or negative – with each other, building trust, loyalty and a sense of community around the brand.

Shoppers are more comfortable shopping around than ever before and with some cohorts buying from more than 40 unique online retailers during the year, customer retention has never been more important.

Next, while it may be a trend that has been gaining momentum for some time, sustainability really does matter.

Sustainability has transitioned from a consumer demand to an expectation and can be the defining reason why a customer chooses one brand over another.

The challenge retailers need to face into is how they can embed sustainable practices that span the entire supply chain from product development right through to recycling options at the product's end of life. Many retailers are taking innovative approaches to this including [DesignereX](#) – a peer-to-peer designer clothing rental service, who are working to reduce the impact of fast-fashion and facilitate a circular economy.

Lastly, the interplay of 'bricks and clicks' is shaping up to be the next frontier for retailers in Australia, as shoppers increasingly look for tangibility even when buying from retailers with a purely online presence.

Many retailers are harnessing the power of social media and investing in social selling and social commerce. Today's shoppers are discovering and exploring new brands and products through content shared by their peers. While still a growing channel it is important retailers consider how they can use social media as part of their selling strategy.

While it is expected that 2022 will be a more stable year accompanied by slower growth rates, the opportunities for retailers are far from diminished.

The way consumers purchase goods has permanently shifted, and as a result businesses are investing heavily in their digital capabilities, for both B2C and B2B activities. With the rise of wholesale marketplaces such as TradeSquare, it's making it easier for retailers to manage their day-to-day processes and invest more time into growing their business.

State of eCommerce



Shoppers are spending more online

More Aussies are shopping online, with four-in-five households (81%) buying something online at some point during the year.

Aussie shoppers spent an incredible \$62.3 billion on online physical goods in 2021.¹ This represents a 19.3% share of total retail sales, with that figure continuing to grow steadily year-on-year.²

Growth in spending on online physical goods was strong, at 23.4% YOY.¹ This growth is in large part due to the new habits that have formed since the onset of the pandemic. Ongoing restrictions further strengthened this growth and encouraged shoppers to continue to buy online more frequently.

Looking ahead, we expect online shopping to continue to grow much faster than physical retail. It's clear Australians have grown to love the ease and convenience of buying online and are likely to continue doing so regularly throughout 2022.

When we look closer, growth varied significantly across regions and across categories, with the States and industries that saw strong acceleration in 2020 experiencing softer growth throughout 2021.

19.3%

Online share of retail spend in 2021

Retail spend²

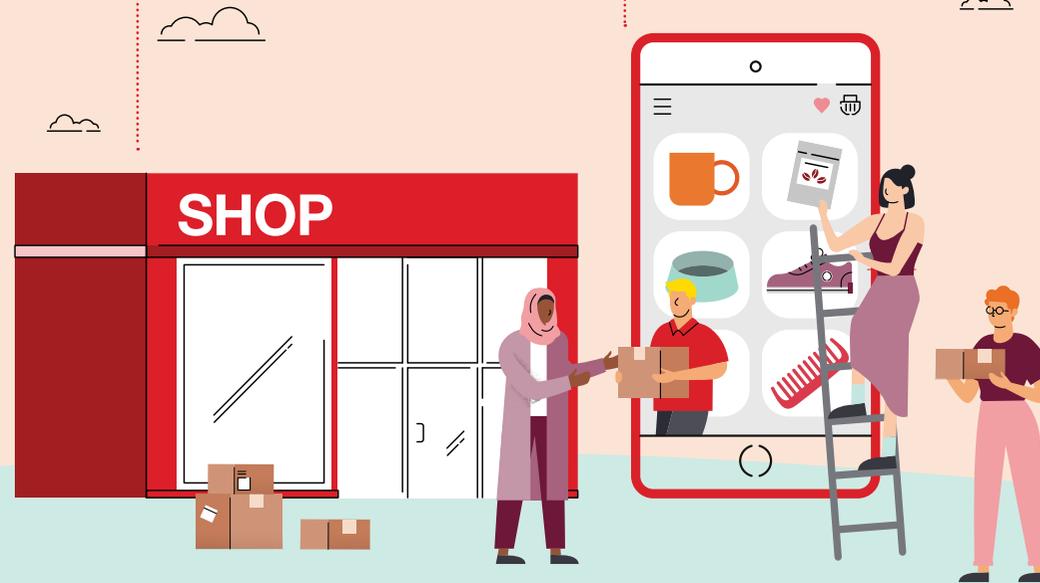
\$323.7bn

↑ 4.3% YOY

Online goods spend

\$62.3bn

↑ 23.4% YOY



Purchase frequency is on the rise

As the popularity of online shopping continues to grow, so too does the number of online purchases made, with national year-on-year growth of 12.3% in 2021.

An astounding 73.1% more purchases were made online in 2021 compared to 2019, demonstrating the strong change in shopper behaviour over the past two years.

Metro areas have experienced more restrictions due to the pandemic, and as a result have seen slightly higher growth than regional. Households in inner regional areas contributed the most online purchase growth across regional locations.

Metro YOY growth

12.9%

77% growth compared to 2019

Regional YOY growth

10.6%

64% growth compared to 2019



↑ 12.3% YOY
73% growth compared to 2019

The top locations for online shopping



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Liverpool, NSW 2170
3. Hoppers Crossing, VIC 3029



Top buying locations by households

1. Helensburgh, NSW 2508
2. Silverdale, NSW 2752
3. Seaforth, NSW 2092



Our predictions for future growth

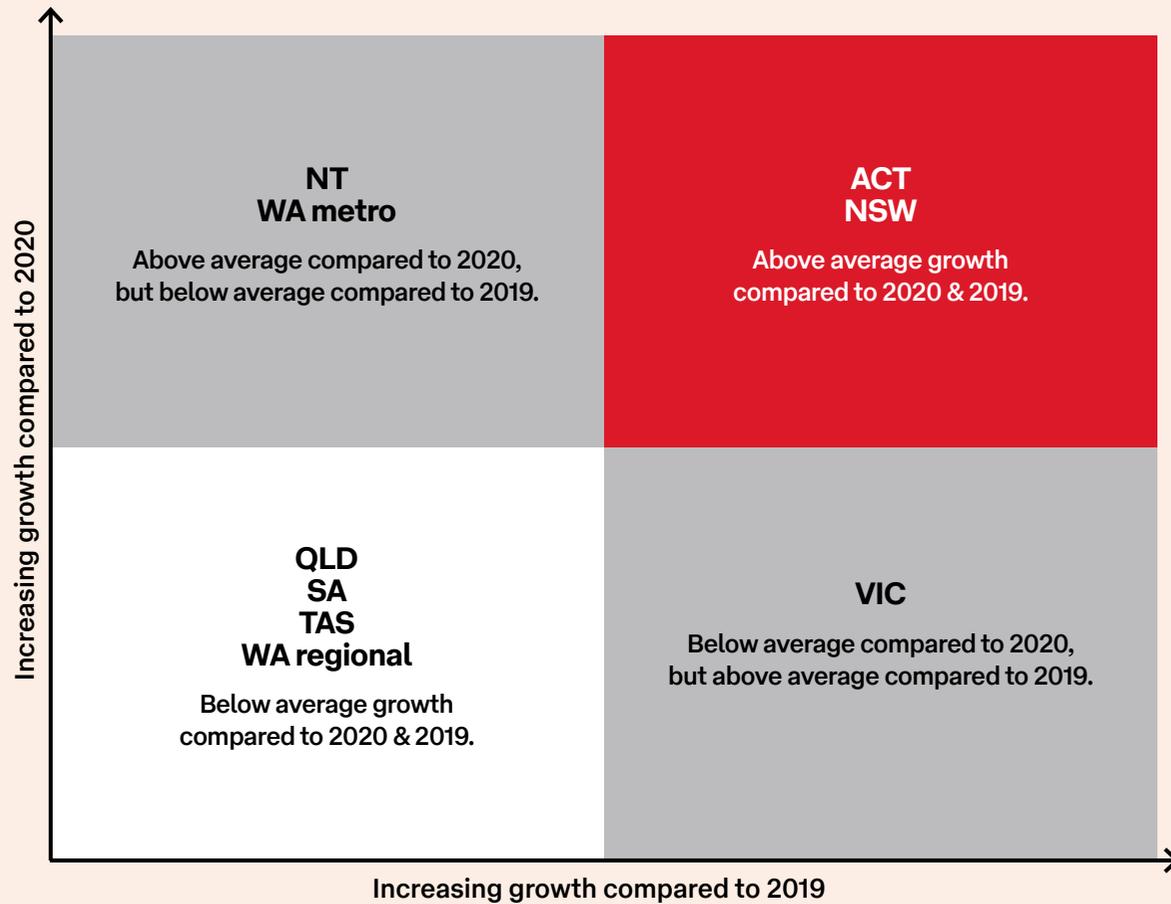
1. Riverstone, NSW 2765
2. Rockbank, VIC 3335
3. Fraser Rise, VIC 3336



Discover more of the top suburbs with our [eCommerce suburb pulse check](#).

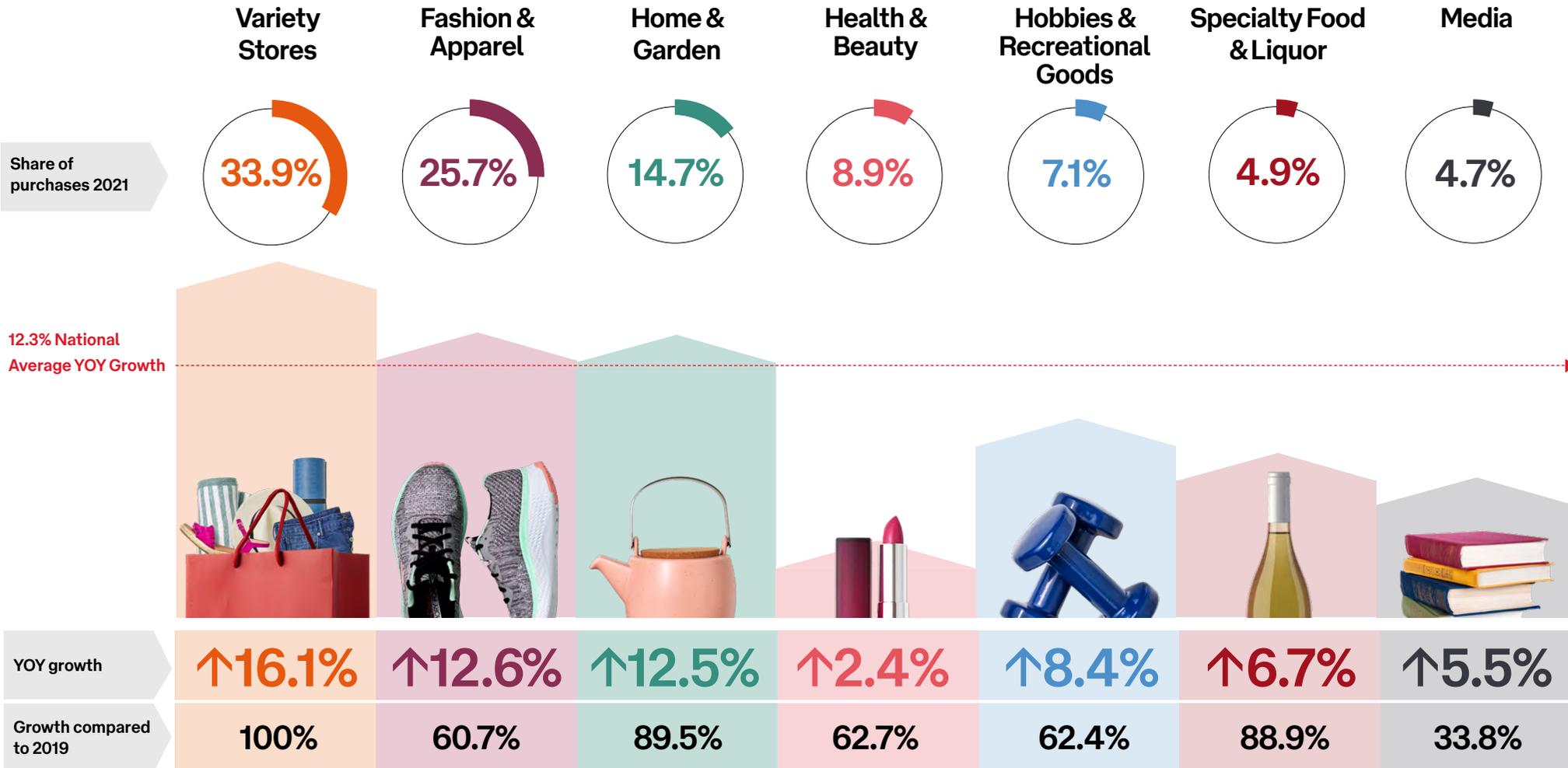
Tracking the growth of each state's metro and regional purchases against 2020 and 2019

As the graph below shows, New South Wales and ACT recorded the strongest growth against both 2019 and 2020. Through 2021, Victoria bucked the trend with the state recording YOY growth below the national average despite experiencing more lockdowns than in 2020.



Breaking down growth by specialty retailer

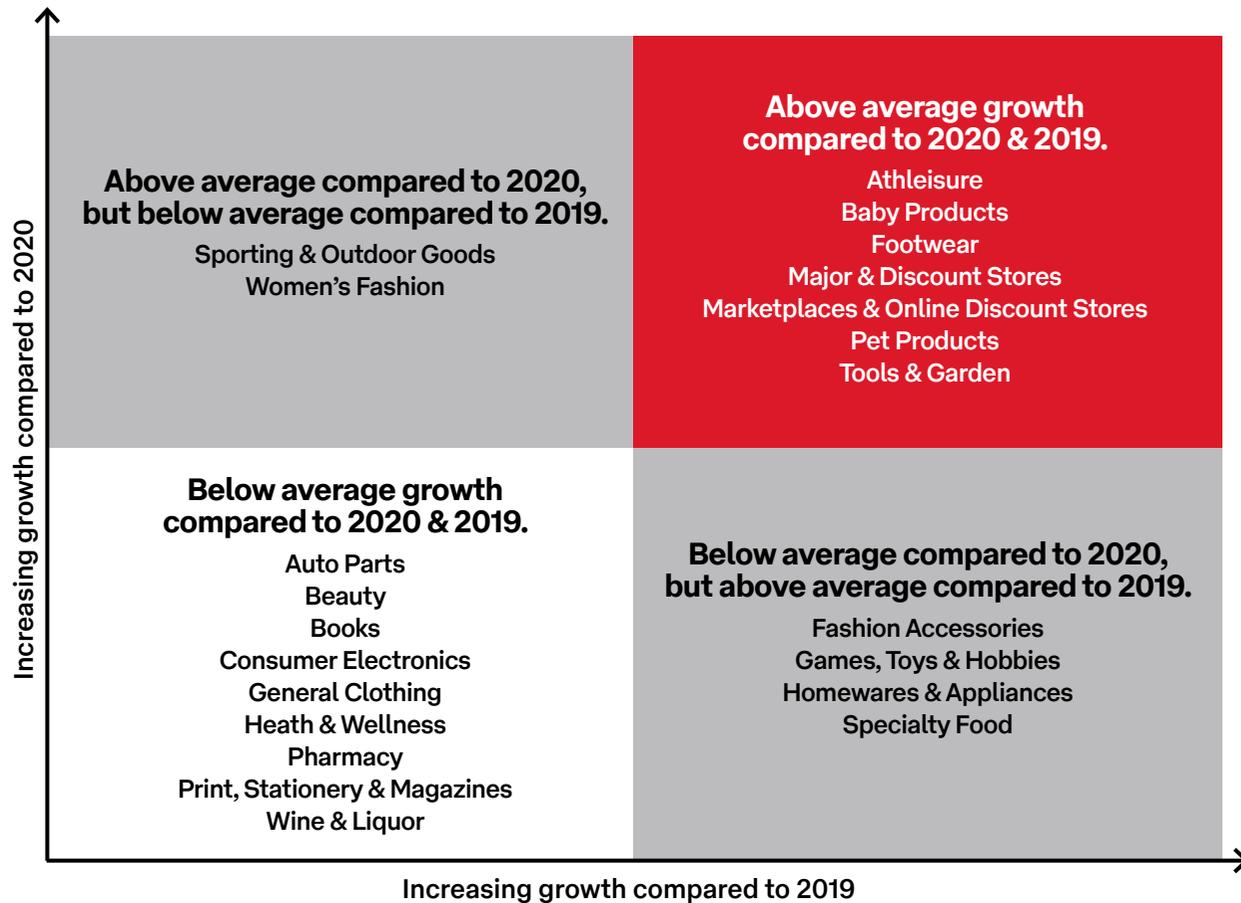
Throughout the 2021 calendar year, shoppers bought from a broader cross-section of retailers. Given this increased confidence to shop around, customer retention needs to be an important focus for retailers in 2022.



Tracking the growth of specific retail categories against 2020 and 2019

Specialty retailers such as Athleisure, Major & Discount Stores and Pet Products (in the red box below), performed extremely well in the last two years.

In 2021, Women's Fashion and Sporting & Outdoor Goods performed better than 2020, with above average YOY growth. Conversely, specialty retailers like Homewares & Appliances experienced below average YOY growth in 2021 – yet they grew significantly at the start of the pandemic.



A look at eCommerce and cross-border purchases across the globe

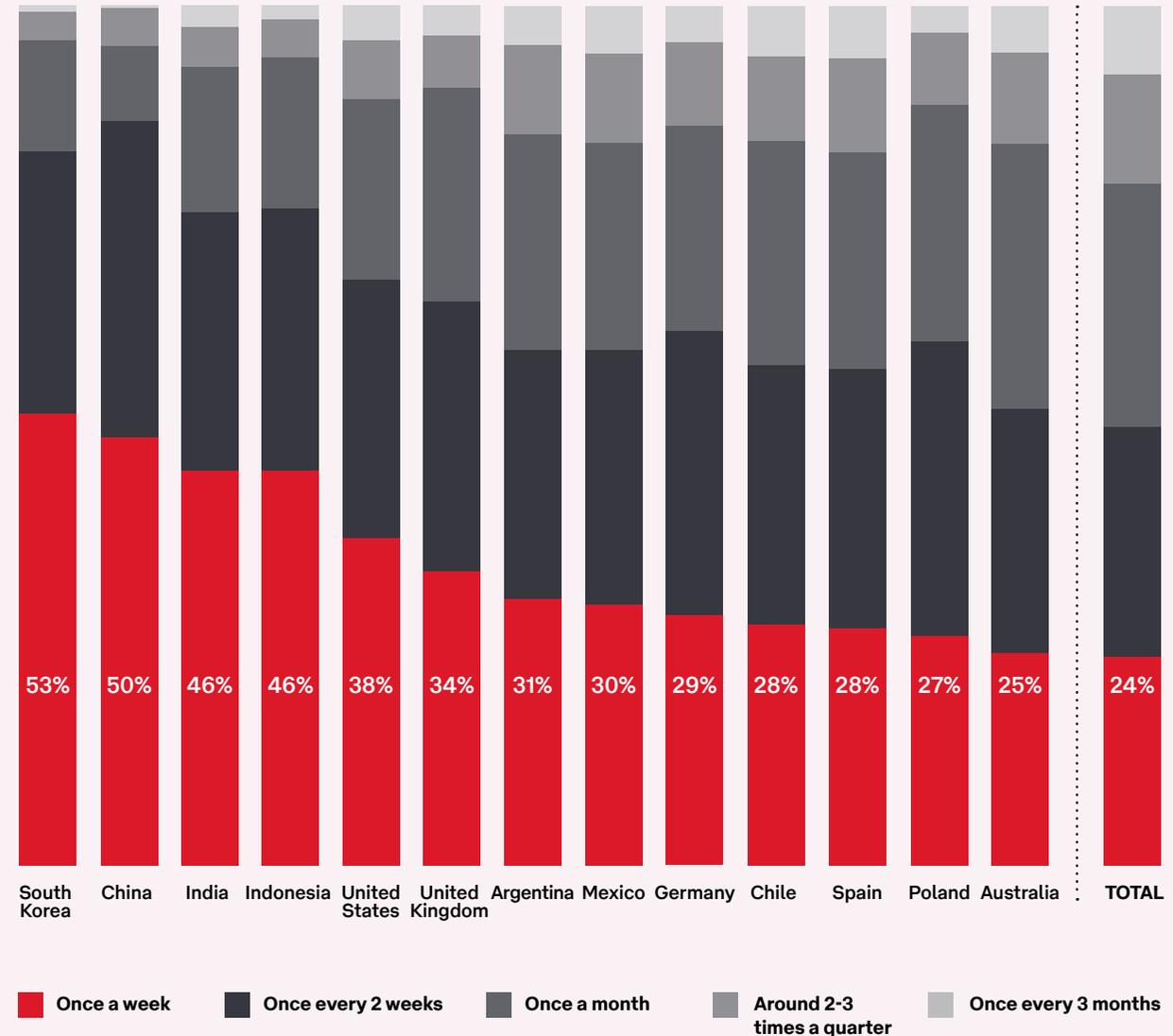
Australia outperforms other countries when it comes to the number of consumers shopping online at least once a month, but lags behind with high-frequency shoppers.

According to a survey³ of 25 countries that tracks consumers who have bought physical goods online at least once in the past three months, and made at least one cross-border purchase in the past year, Australia sits just above the global average, but behind many of our international peers.

In Australia, 84% of respondents shop online at least once a month – four points above the rest.³ Yet when it comes to the countries with the most high-frequency shoppers, Australia still has some ground to cover.

In South Korea, China, India and Indonesia, more than 45% of consumers shop online at least once a week – almost double Australia’s rate of 25%.³

Frequency of online shopping



Shopper habits



SHOPPER HABITS

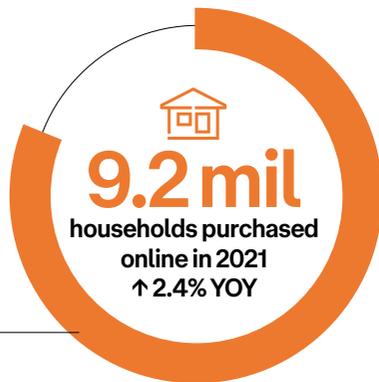
Shoppers' habits are evolving

Throughout 2021, rolling restrictions helped to cement online shopping as a permanent fixture within the Australian retail landscape. More households shopped online, and more often, via more channels than ever before.

5.4 mil

households purchased online monthly in 2021

↑7.3% YOY



That's 81% of Australian households.

“Social platforms are the direction moving forward. We are predominantly using Instagram shops and have seen revenue from Instagram shopping grow 123% year on year from FY20 to 21.”

- Kasie Heathcote, Group General Manager – Digital & Loyalty at Accent Group Limited

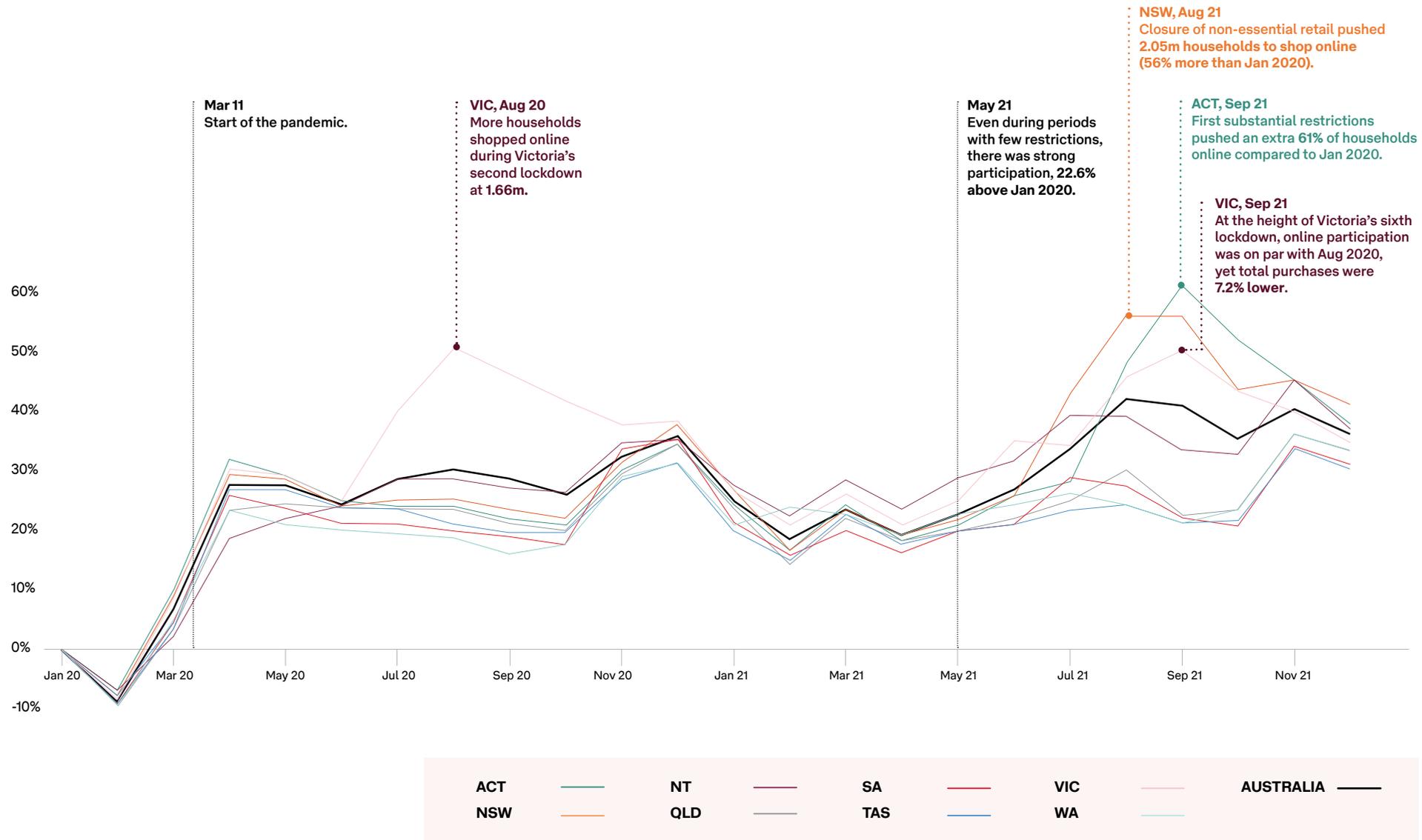
“Buy now pay later services have exploded in the past year... the other big driver of success for us has been TikTok.”

- Alex Tomic & Nik Mirkovic, Co-Founders at Hismile



Household participation in online shopping by state

Indexed to January 2020



eCommerce continues to grow

Shoppers purchased from a wider variety of retailers and product categories.

The gains that were made in 2020 continued throughout 2021, with shoppers continuing to increase their online shopping activity.

 Average number of retailers shoppers purchased from:

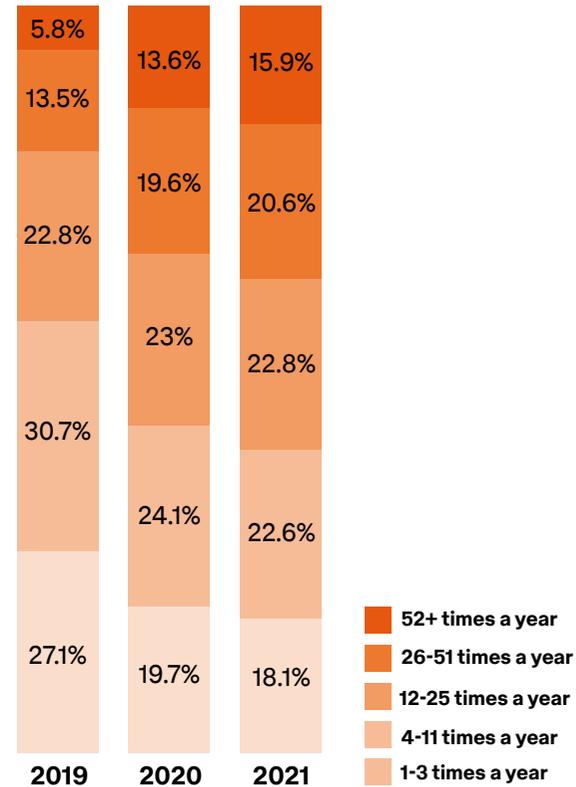


 Average number of categories shoppers purchased from:



Households are buying online more often.

In 2021, more households made online purchases at least fortnightly – an increase of **112%** from 2019, from 1.6m to **3.4m** households. On the other hand, fewer households shopped less than monthly. This ‘low frequency’ cohort fell by 21% (972K households) compared to 2019.



Meet Australia's online shoppers

To understand how shopper behaviours have changed, we've broken them down into four **shopper profiles** to describe how active they were online in 2021. These shopper profiles are all highly engaged with bricks & clicks retailers, and as they become more familiar with online shopping, their online activity increases. This has driven shoppers to expand their interests from big brands to digital native retailers.



Occasional Shoppers

2.8m Australian households

1-4 active months Average 3 retailers p.a.

30.5%
of online shoppers

4.2%
of volume

Shopping from a limited range of retailers, this cohort is likely to value efficiency, reliability and trustworthiness. Occasional Shoppers present a huge growth opportunity for merchants, in particular big brands.

- Over one third of households in Northern Territory, South Australia and Western Australia are Occasional Shoppers.



Top three postcodes by percentage of shopper group:

- Woodridge, QLD 4114
- Lakemba, NSW 2195
- West Perth, WA 6005



“ Lockdowns meant I did more online shopping than usual. But I'm happy the shops are back open as I prefer the personal experience of in-store.”

- **Occasional Shopper,**
Mornington VIC



Active Shoppers

2.5m Australian households

5-8 active months Average 10 retailers p.a.

26.7%
of online shoppers

15%
of volume

Shopping from a wider range of retailers, this cohort is more likely to purchase from marketplaces and compare different options to get a better deal.

- On average, shopped from 47% more merchants in 2021 compared to 2019.
- About 28% of households in Queensland, Western Australia and ACT are Active Shoppers.



Top three postcodes by percentage of shopper group:

- Melbourne St Kilda Road, VIC 3004
- Newington, NSW 2127
- West Melbourne, VIC 3003



“ I enjoy looking around online for the best value purchase option and have shopped from a lot more stores over the last year.”

- **Active Shopper,**
Newington NSW



Very Active Shoppers 2.5m Australian households

9-12 active months Average 19 retailers p.a.

27.5% of online shoppers **31.8%** of volume

With extensive shopping experience, these savvy shoppers are on-trend and knowledgeable. They are more likely to value efficiency and purchase from digital native retailers where they can get detailed product information and better customer service.

- On average, shopped from 77% more merchants, compared to 2019.
- 78% increase in number of merchants frequented three or more times in 2021, compared to 2019.
- Over 28% of households in ACT, Victoria and Tasmania are Very Active Shoppers.



Top three postcodes by percentage of shopper group:

- Secret Harbour, WA 6173
- Wakerley, QLD 4154
- Ferny Hills, QLD 4055



“I’m signed up for quite a lot of loyalty programs with online stores! It’s a nice touch when you get something extra added in, and when you shop online as much as I do, it doesn’t take long to get rewarded.”
- **Very Active Shopper, Wakerley QLD**



Super Shoppers 1.4m Australian households

10-12 active months Purchase at least weekly Average 41 retailers p.a.

15.3% of online shoppers **49%** of volume

The masters of online shopping, Super Shoppers have high expectations and like to take control of their shopping journey. They have strong market knowledge and are comfortable shopping around to get the product they want, when they want it and at the best possible price. They tend to purchase more from retailers who have a wide product range and incentive programs. Despite being the smallest cohort they are the most lucrative, accounting for almost half the online shopping volume in 2021.

- Average monthly purchases almost doubled in 2021, compared to 2019.
- Number of merchants visited more than doubled in 2021, compared to 2019.
- Shopped from a variety of retailers, with merchants frequented three or more times increasing to ~eight in 2021 (1.4 times more than 2019).
- Shopped across a wider span of categories, 60% higher than 2019 (~16 categories in 2021).
- Two-in-five (40%) Super Shoppers are located in New South Wales and 29% reside in Victoria.



Top three postcodes by percentage of shopper group:

- Frenchs Forest, NSW 2086
- Menai, NSW 2234
- Diamond Creek, VIC 3089



“Shopping online has become a bit of a habit for me. I have my favourite stores that I keep going back to, but that list just seems to keep on expanding.”
- **Super Shopper, South Yarra VIC**

Fewer new shoppers are entering the market

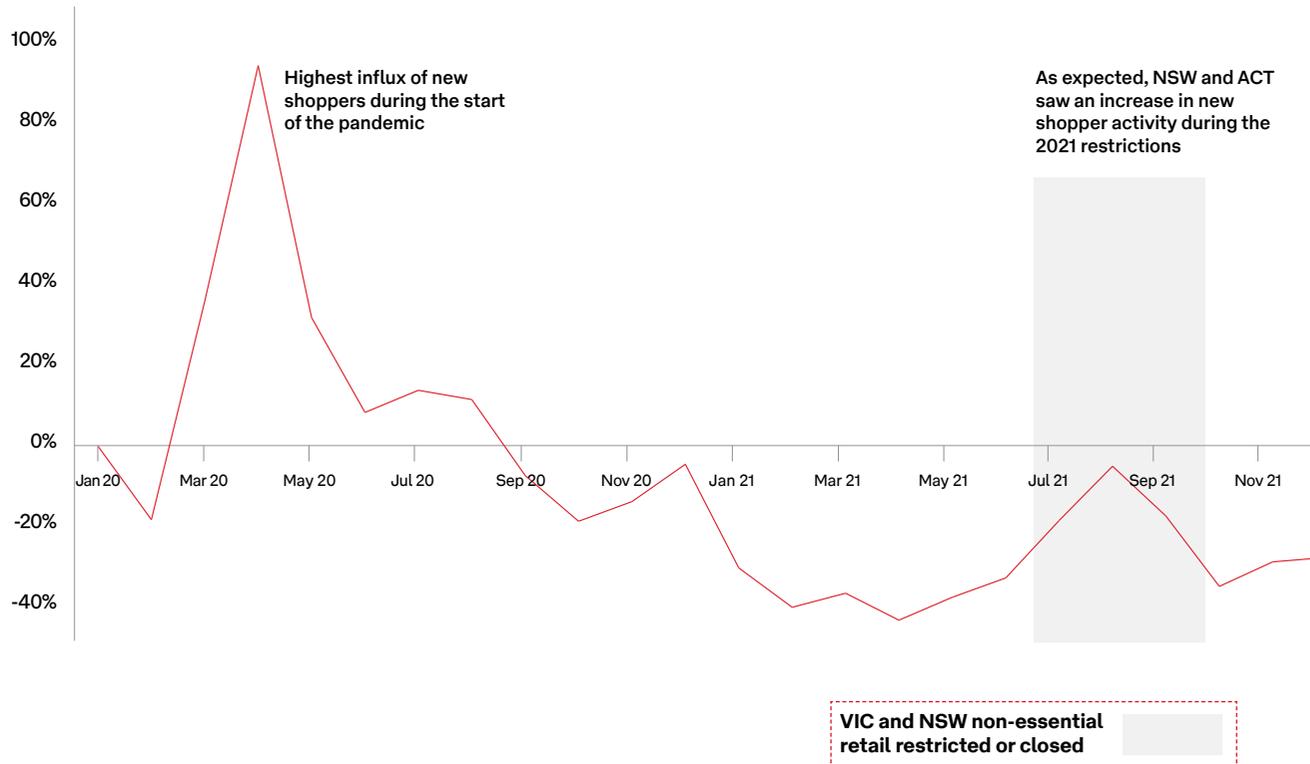
When did they start purchasing?

The number of new shoppers entering the eCommerce market has been declining since the biggest influx was recorded in April 2020, indicating that new shoppers have transitioned to active online shoppers. That influx (shown in the graph below) coincided with increased restrictions.

We define new online shoppers as residential households that, prior to their most recent online purchase, didn't make an online purchase in the previous 12 months.

New Australian households shopping monthly online

Indexed to January 2020



Where are 2020's new shoppers now?

Of the 1.7 million new shoppers in 2020, 1.4 million households continued to purchase online in 2021. Around two in every three purchases (62%) were made by Very Active Shoppers and Super Shoppers.



“As Boutiques closed temporarily during lockdowns, our customers began buying their coffee products from Nespresso online. This was the first introduction to our online services for some, and it seems the ease and convenience ... have prompted many to continue shopping online.”

- Jean-Marc Dragoli, General Manager at Nespresso Oceania

The future of eCommerce



Growth in online shopping is stabilising

Lockdowns accelerated online shopping, yet the trend is slowing.

Purchase volumes grew during the lockdowns of 2021 – that is, months in which restrictions on non-essential retail were in place for more than two weeks. In parallel, growth during non-lockdown months softened compared to 2020.

In New South Wales, the average online purchase volume during lockdown months was 1.7x the volume in non-lockdown months. In Victoria, it was 1.4x the volume.

Taking a longer view, the trend towards flatter growth becomes even more apparent. In 2020, growth over two years was 83%, almost double that of 2019. This slowed to 73% in 2021.

In Victoria, the sixth lockdown (in 2021) had less impact on online purchase volume compared to the second lockdown (in 2020), with impact measured by comparing average growth during lockdown months with pre-pandemic months over two years.

These observations indicate the industry is beginning to normalise again, with online purchases trending towards the natural growth we saw prior to the pandemic.

With extraordinary growth in online purchases in previous years, YOY growth in 2021 was lower.

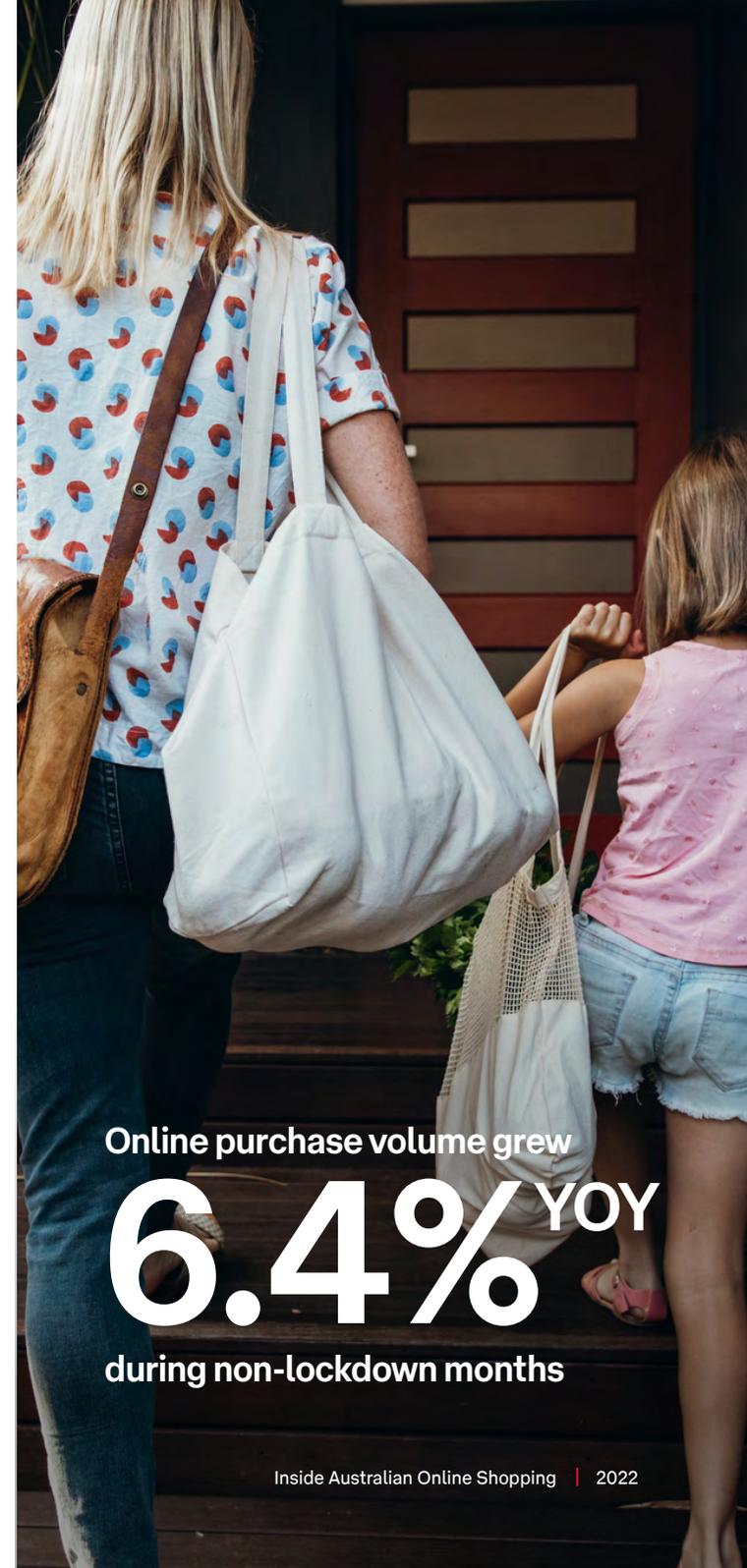
On average, when we look at non-lockdown months in 2021, online purchase volume grew 6.4% YOY. This is lower than the previous two years (52.2% YOY in 2020 and 17.8% YOY in 2019), and is indicative of the slower growth anticipated throughout 2022 if the COVID-19 situation remains stable.

Shoppers intend to buy more local products online.

Even though growth is slowing, there is a silver lining for Australian online retailers. 27% of shoppers from 40 countries say they will buy more from domestic retailers in the future, while 31% of Australian shoppers plan to buy more local products.⁴ This suggests there will be more opportunities to capture local market share.

“There is a real interest in Australian-made items. People are really excited to see products that are made in AU. It’s important for us to make sure that we’re keeping the economy strong in house.”

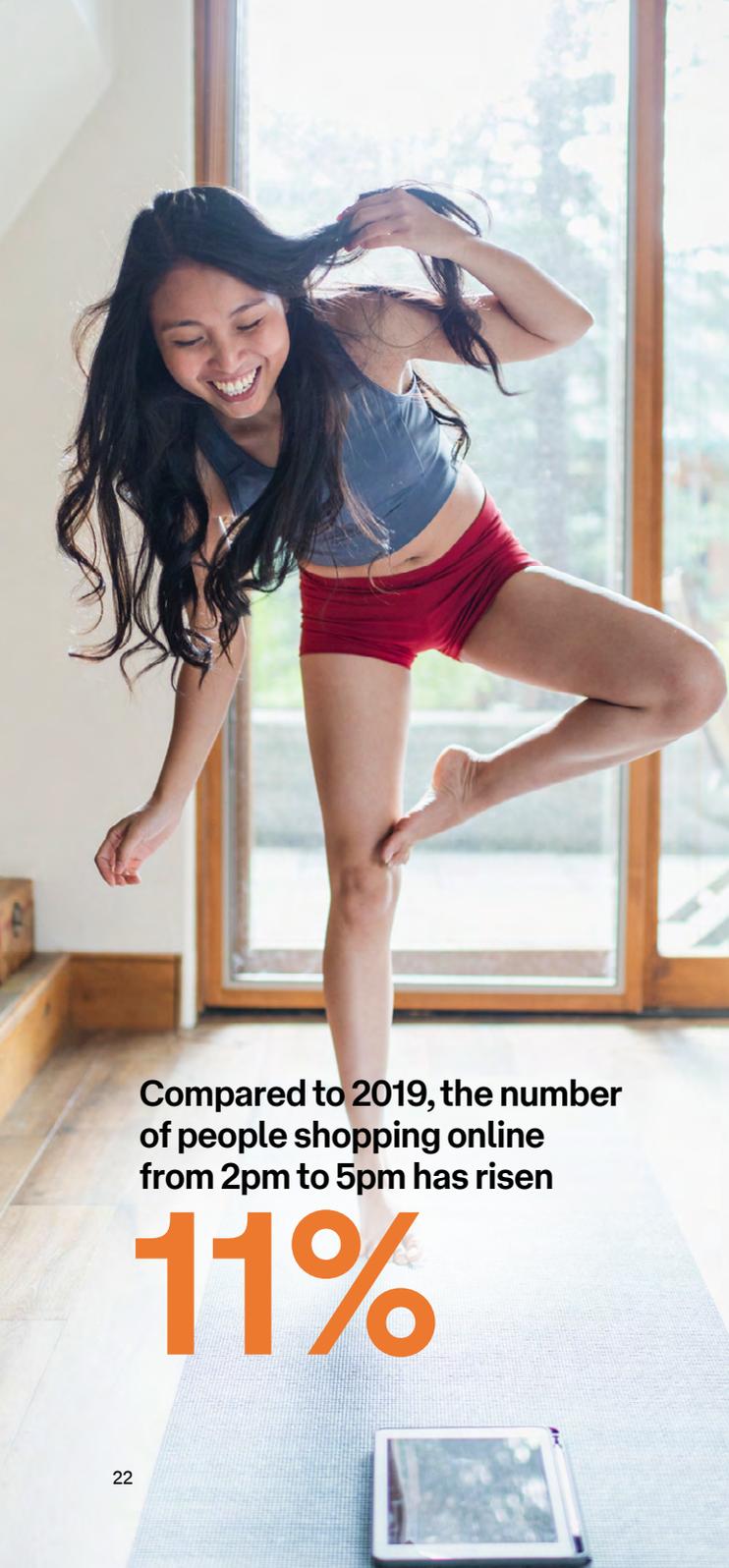
- Einat Sukenik, Co-Founder and CEO at TradeSquare



Online purchase volume grew

6.4% YOY

during non-lockdown months



Compared to 2019, the number of people shopping online from 2pm to 5pm has risen

11%

THE FUTURE OF ECOMMERCE

New habits are here to stay

People plan to keep shopping online.

The vast majority (93%) of respondents in a recent survey said they'll maintain or increase their online shopping activity in 2022.⁵

- i** Online sales will continue to be a major lure – and, to remain competitive, retailers should focus on keeping customers engaged.

Click & collect is becoming more common.

The proportion of click & collect services in online shopping has grown to 13.6%.⁶ Survey data suggests that most respondents choose click & collect due to its immediacy and lack of associated charges such as shipping.⁶

- i** Retailers can offer more shipping options, free shipping incentives and order status notifications to provide customers with a better shopping experience.

Shoppers are more active online during the day.

People are making more online purchases during the day compared to 2019, with an 11% drop in mid-evening (7pm to 10pm) purchases and an 11% rise in afternoon (2pm to 5pm) purchases.⁷

- i** Retailers planning marketing campaigns to attract new customers or boost engagement with existing customers can time them accordingly.

“We’ve launched loyalty programs for Sketchers and Hype in the past 12 months, with plans for more to come. The focus is on taking customers from their first purchase with us to a second purchase, so we offer them a lot of value. It’s all about giving them a reason to continue shopping with our brands.”

- Kasie Heathcote, Group General Manager – Digital & Loyalty at Accent Group Limited

“Our main business’ focus is primarily on customer experience, like offering fast and easy shipping methods. We do same day delivery to get orders out, packing them by 3pm and delivering to the customers in that 6-9pm window bracket.”

- Lisandro Paz and Benn Martiniello, Co-Founders at Elite Eleven Sporting

“In the past year, with people working from home, we’ve seen a surge in afternoon traffic to our website, between the hours of 3-5pm. Traditionally, the evenings between 7-11pm had been our peak period.”

- Rob Godwin, Australasian Director & Head of Commercial Operations at Lovehoney

Shopper habits are influencing performance across retailer sectors



BRICKS & CLICKS

Outperformed others in the last two years, growing more than 100% since 2019, with its share increasing over four percentage points.

Most growth occurred in 2020, and we expect to see this sector start to stabilise.



MARKETPLACES

Performed strongly – with consistent, above average growth in the last two years.

We expect marketplaces to continue being a strong player in the eCommerce market.



DIGITAL NATIVES

Experienced slower-than-average growth in the last two years, due to other retail segments (e.g. bricks & clicks) being more active in the eCommerce market.

We expect digital native retailers to continue being a strong player in the eCommerce market.



BIG BRANDS

Grew slower than average in 2020, but caught up in 2021 and it is now on par with the national average.

We expect to see more growth in this segment as shoppers choose to purchase from big brands directly.

The peer-to-peer fashion platform redefining retail



Kirsten Kore and Costa Koulis, Founders at Designerex

Designerex is not your typical retailer. The world's largest peer-to-peer designer dress sharing platform helps women access designer clothes they may not otherwise be able to afford – particularly for one-off events.

Founders Kirsten Kore and Costa Koulis started the fashion marketplace after Kirsten rented a dress from a complete stranger on Facebook. It was a risky transaction – one that they set out to solve with Designerex.

Yet building the business was not without its challenges. Not quite eCommerce, not quite retail, Kirsten and Costa knew they needed to deliver a great customer experience. They worked hard to perfect everything from shipping to payment solutions.

“While we can't control the inventory, we can control every other aspect of the user experience,” said Kirsten.

“For example, speed and reliability of deliveries are incredibly important to our customers. So we've worked hard to offer fast, convenient delivery options – and can get items in shoppers' hands within as little as three hours.”

Behind the scenes, Designerex is using ID verification to ensure that the people renting dresses are legitimate. And, to further enhance the customer experience, they have partnered with third-party technology providers for things like data analysis and personalisation.

“Sustainability is top of mind for today's consumers, and Designerex taps into this sentiment with its sharing model. Yet it also supports a vibrant fashion future by helping women express themselves through their clothes.”

“We're here to help extend the life of garments and support women's sustainable fashion choices. We also help people make money from their dresses,” said Costa. “It's a win-win for the dress owner and the person renting it.”

Sustainability is more important than ever before

Sustainability is top of mind for consumers and businesses.

Over eight in 10 Australians care about environmental sustainability.⁹

Businesses are responding, with 88% today having some form of sustainable practices and products. Of these, 34% have experienced improvements in customer loyalty and company culture as a result.¹⁰

Sustainability affects how people shop online.

Survey data shows that one-in-four shoppers selected a brand due to ethics and sustainable practices¹¹, and 60% are willing to pay more when it comes to buying sustainable and ethically made products.⁸

People are most likely to purchase sustainable products from:⁸



Groceries



Fashion



Beauty

3 in 4

Australians consider some element of sustainability when they shop online⁸

“The first thing that our customer sees is our packaging, so we focus on what we can do from a sustainability point of view around packaging. It needs to be practical and serve its main purpose.”

- Lok-Man Shu, Group Environment Manager at Country Road Group

“Some key trends we’ve identified are increasing searches for sustainable and eco-friendly products.”

- Einat Sukenik, Co-Founder and CEO at TradeSquare

How can businesses be more sustainable?

Three ways to be a more sustainable business.⁸

1

Create and share your sustainability goals

Show customers and stakeholders what you are working towards.

2

Deliver on your commitments

To maintain momentum and build trust with your stakeholders, be sure to align your sustainability goals to your business strategy and actively deliver on them.

3

Offer sustainable packaging and delivery options

Apart from products and brands, Australians ranked sustainable packaging and delivery as key considerations when shopping online.

This brand is solving the world's waste problem, one delivery at a time



Mike Smith, Founder at Zero Co

Zero Co's mission is bold, but simple: to untrash the planet. To get there, the sustainable Aussie start-up offers a subscription-based, zero-waste delivery service for personal care and cleaning products. And, in the words of founder Mike Smith, "it's scaling astronomically."

Since its launch, 56,000 Aussies have signed up. And, behind the scenes, the Zero Co team has pulled tonnes of waste out of our oceans, both in Australia and overseas.

The Zero Co team lives and breathes sustainability. To make its iconic 'Forever Bottles', Zero Co collects and recycles plastic rubbish from the bottom of Sydney Harbour, the beaches of Fraser Island and other far-flung places. The refill pouches can be re-used again and again, eliminating single-use plastics from its supply chain, with a postage-page return envelope included in your order for easy returns.

It's a brilliant model, and it's clearly working. So what tips can Mike share with those who have their sights set on becoming more sustainable businesses?

"The first thing I always say to people is don't be sustainable because you think it's good for marketing or a good story to tell. Be sustainable because you care about the planet and want to have an impact."

"The second thing is that you don't have to solve every problem overnight. Look at the things you can achieve today, or what's possible tomorrow. Deal with it in bite-sized chunks."

"Finally, know that there's always room for improvement. At Zero Co, we're always seeking new ways to become a greener business. Sustainability is an ongoing journey."



The market perspective: retailers vs. shoppers



Paul Zahra, CEO of the Australian Retailers Association, reflects on another big year for retail

2021 was an up-and-down year for retailers. It often felt like change was the only constant, with different COVID-19 rules and health protocols across the States and Territories impacting retailers in varying ways. Agility proved the key to navigating through it all.

As the data in this report shows, online goods spend continues to outpace overall retail spend, growing 23.4% YOY (compared to 4.3% YOY growth overall).¹

The Delta lockdowns in New South Wales and Victoria – which saw physical stores closing for several months – no doubt had an impact here, along with record-breaking Black Friday sales and people shopping early for Christmas.

Across the board, two of the biggest challenges for retail in 2021 were inextricably linked to COVID-19.

The first is the ongoing supply chain issue, which is unlikely to ease any time soon due to the sheer volume of products within the global supply chain, the profound shortage of freight space on ships and the limited number of flights into the country. It's having an impact on price hikes, lead times for goods and cashflow.

The second challenge is staff shortages, which is exacerbated by current COVID-19 isolation requirements and limited access to skilled foreign labour and international students. In small business, a couple of COVID-19 cases can force entire teams into isolation, which in turn leads to limited trading hours or temporary store closures.

Yet it's not all doom and gloom. One of the positives to emerge from COVID-19 has been a powerful, permanent shift in the way people live, work and shop. This shift has highlighted how important it is for retailers to have an omnichannel strategy that caters for all customers – however they choose to interact. Pleasingly, we've seen many small businesses make this shift, boosting their online capabilities to complement their in-store offerings.

Online sales have surged, with Aussies spending \$62.3bn online¹, which represents a steadily growing 19.3% of all spend on retail sales².

We expect this growth to continue in 2022 and beyond, which is contributing to the sense of optimism in the retail sector.



Paul Zahra
Chief Executive Officer
Australian Retailers Association



Paul Zahra's top tips for retailers

- Use the data and insights in this report, particularly those relating to your retail category, to help shape your eCommerce strategy for 2022 and beyond.
- To meet the changing needs of consumers, focus on building out your digital channels and enhancing the online shopping experience.

The Australian Retailers Association (ARA) is the oldest, largest and most diverse national retail body, representing a \$360bn sector which employs 1.3 million Australians and is the largest private sector employer in the country.

As Australia's peak retail body, representing more than 100,000 retail shop fronts and online stores, the ARA informs, advocates, educates, protects and unifies our independent, national and international retail community.

To learn more about ARA's exclusive member benefits and more, visit retail.org.au

Kasie Heathcote, Group GM – Digital and Loyalty at Accent Group, charts a year of incredible growth in online sales

The Accent Group, home to more than 20 iconic footwear and apparel brands, had a hugely successful year in 2021. Online sales totalled \$209.9 million, up 48.5% on the prior year and represented 20.9% of retail sales.

Last year’s remarkable online growth is testimony to the investment we made in our digital channels. For example, we reinvigorated the on-site experience and launched loyalty programs with key brands to improve customer retention and drive sales.

Our growth was not without its challenges. There was a huge amount of disruption in retail last year, with store closures and different rules for different states. Across our 700+ stores, we had to sort out digital fulfilment, click & collect and other issues like staffing throughout lockdowns. It certainly wasn’t always easy.

Looking ahead, we’re exploring more payment options for our customers, and ways to keep improving the delivery experience. We know that speed of delivery is important to our customers, so we’re looking at how we can offer this. We’re also moving towards more sustainable packaging in response to customer demand.

Conversion rate optimisation and personalisation are also on the agenda for 2022 and beyond.

To help us improve the customer experience and offer greater personalisation, we’ve embarked on a data platform project to bring all customer data from all of our brands’ websites into a central location to create unified customer profiles.

We’re also keeping a close eye on emerging eCommerce trends like social selling, to ensure we’re ready to go with whatever our customers expect from us next. It’s all about delivering a great experience alongside the great products our customers love.



Kasie Heathcote
Group General Manager
– Digital & Loyalty
Accent Group Limited

Where are retailers focusing their investments?

Digital and data is a key investment area for businesses in 2022.

A massive 88% of businesses with an eCommerce presence intend to improve their eCommerce capabilities over the next three months.¹² One-in-three medium businesses estimate that over 25% of their capital expenses will go towards investing in eCommerce.¹²

Businesses plan to invest in a range of eCommerce capabilities.¹²

	Current	Future
Delivery options	63%	26%
Newsletter or blog	41%	15%
Return and exchange portal	42%	13%
Find in-store capabilities	43%	11%
Customer login	58%	10%
Parcel tracking	59%	8%
Online payment methods	77%	6%

Shoppers are clear on what they want

They have different priorities online, in-store and with click & collect.¹³



Top three considerations for online shoppers

1. Convenience
2. Cost savings
3. Product availability



Top three considerations for in-store shopping

1. Immediate collection
2. Easier returns
3. Product availability



Top three considerations for click & collect

1. Immediate collection
2. Convenience
3. Shorter waiting times

They want retailers to up their game in key areas.

According to a recent survey, the top three areas in which shoppers think retailers could improve are product availability, more delivery options and eco-friendly packaging.¹³



Product availability
53%



Delivery options
42%



Eco-friendly packaging
38%



Informative product description
31%



Product reviews
25%



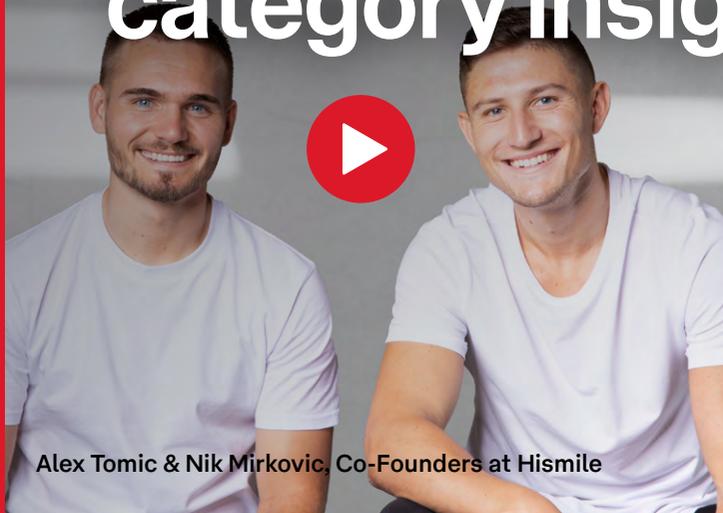
Regular order updates
25%



Payment options
23%



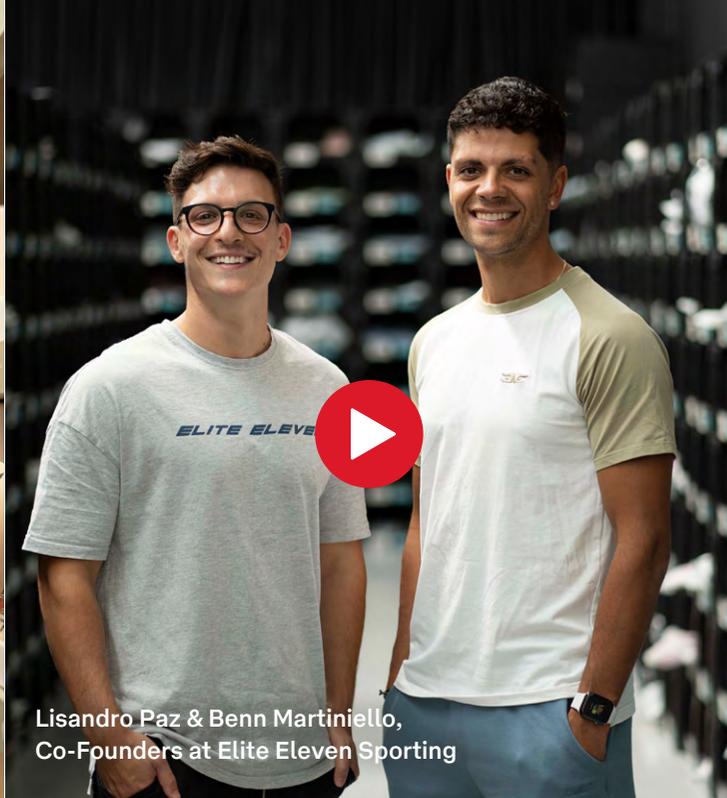
Specialty retailer category insights



Alex Tomic & Nik Mirkovic, Co-Founders at Hismile



Olivia Carr, Founder at Shhh Silk



Lisandro Paz & Benn Martiniello, Co-Founders at Elite Eleven Sporting



Hayden Marks, Founder and CEO at Melbourne Bushfood



Greg Mulligan & Dan Spriggs, Co-Founders at SERVD



Maria Chindris, Business Development Lead at SisterWorks

Variety Stores

7.6 mil

households purchased from Variety Stores in 2021

Almost 83% of all households shopping online

- Fashion & Apparel 8.6%
- Health & Beauty 2.5%
- Hobbies & Recreational Goods 6.4%
- Home & Garden 9.5%
- Other 6.9%

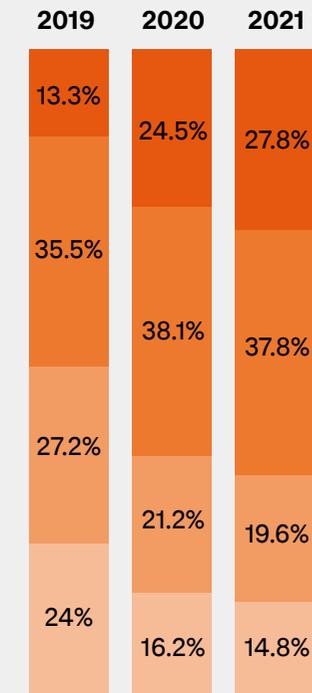


[Click to watch video](#)

“Our typical shoppers are the demographic who purchases ethically and likes to support social businesses.”

- Maria Chindris,
Business Development Lead
at Sisterworks

How often did they shop?



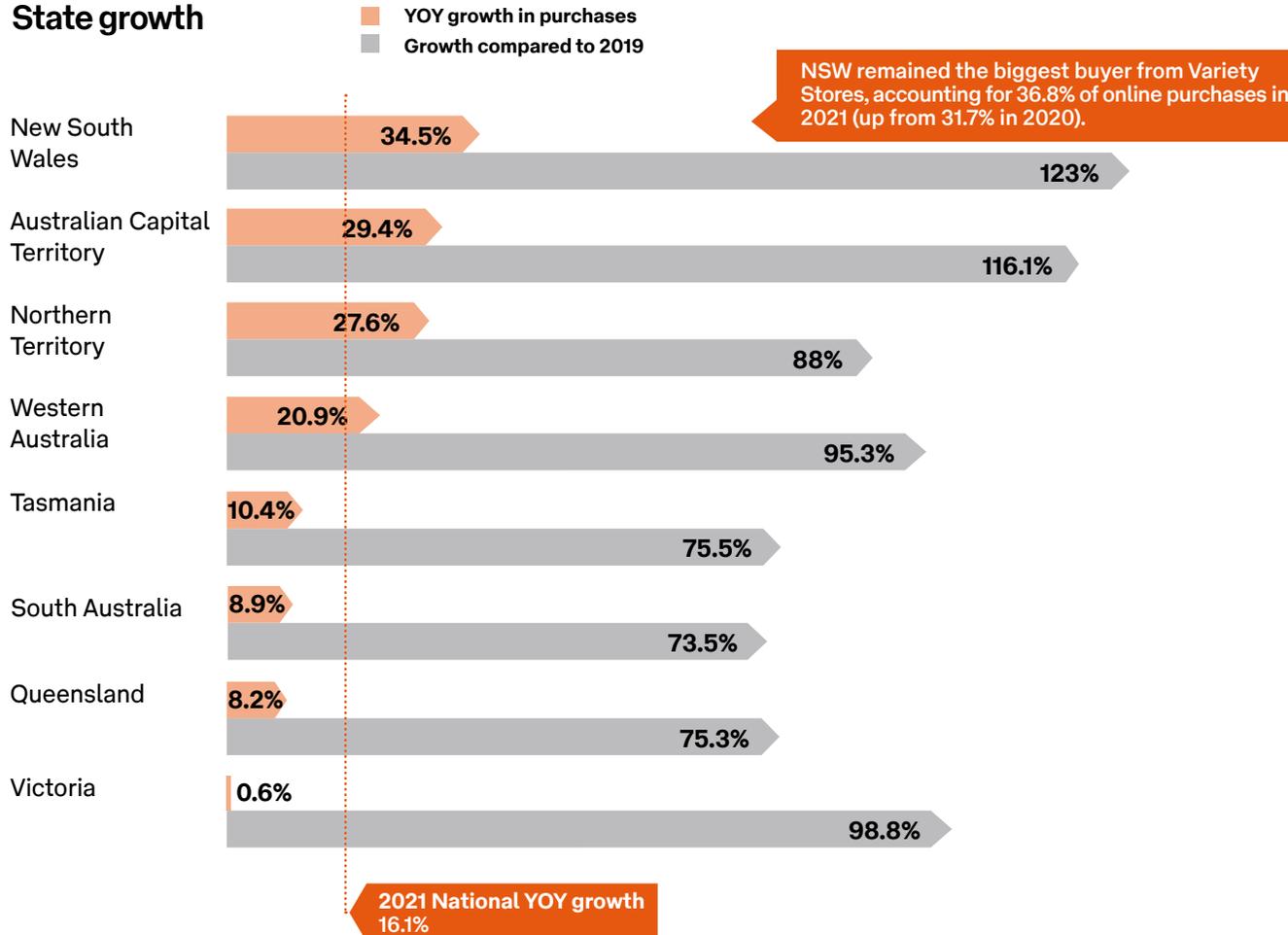
Where else did they shop?

- 12+ times a year
- 4-11 times a year
- 2-3 times a year
- Once a year

Variety Stores 2021 eCommerce snapshot

Variety Stores purchases slowed in 2021, after dramatic growth in 2020 across all States and Territories. New South Wales has led the growth in the last two years.

State growth



Which postcodes are most likely to buy from Variety Stores?



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Liverpool, NSW 2170
3. Hoppers Crossing, VIC 3029



Top buying locations by households

1. Silverdale, NSW 2752
2. Cobar, NSW 2835
3. Helensburgh, NSW 2508



Our predictions for future growth

1. Riverstone, NSW 2765
2. Rockbank, VIC 3335
3. Mount Duneed, VIC 3217



Discover more of the top suburbs for Variety Stores with our [eCommerce suburb pulse check](#).

Metro areas
15.1% YOY growth

Regional areas
18% YOY growth



Variety Stores 2021 eCommerce highlights

Purchases from Variety Stores spiked during sales events (Black Friday/Cyber Monday) and non-essential retail restrictions in New South Wales and Victoria, which coincided with Afterpay week in August.

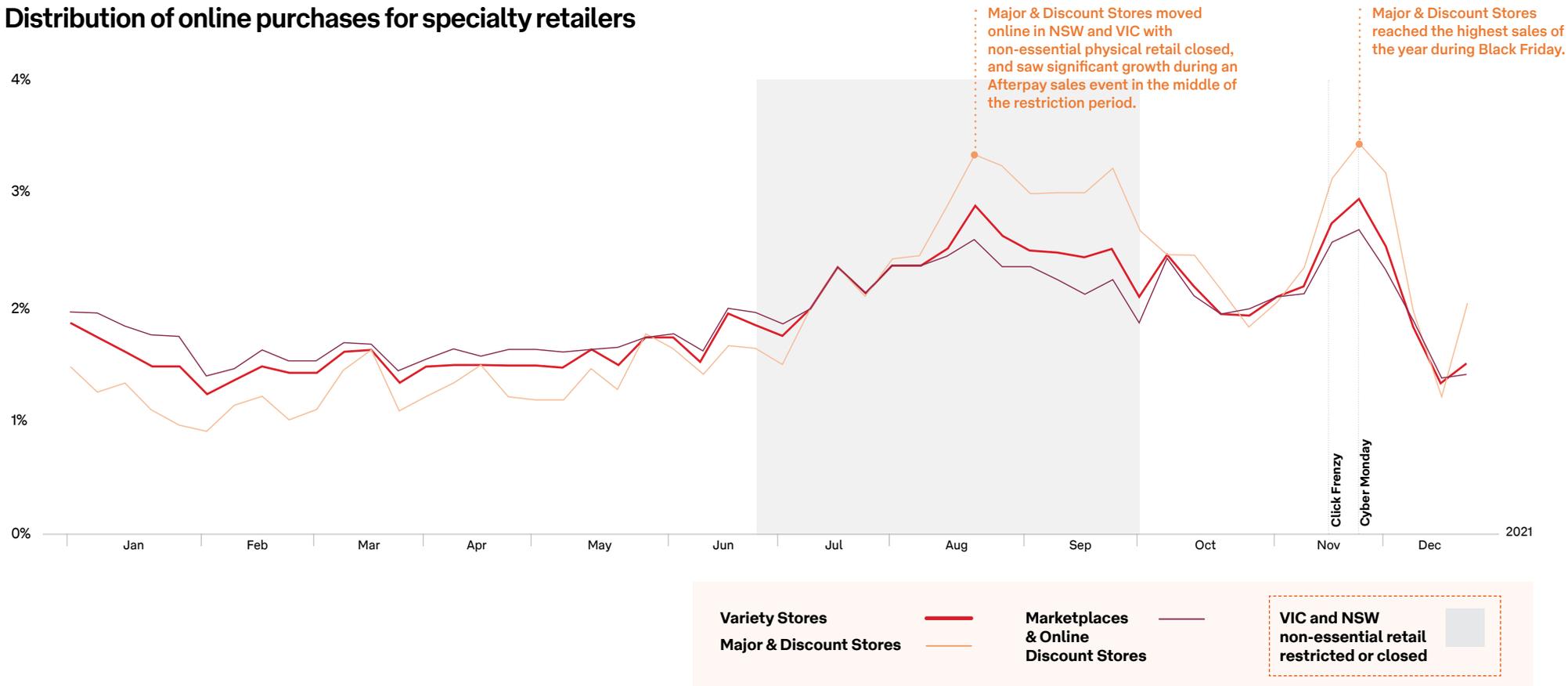
During the significant peak in August, Major & Discount Stores proved most popular with shoppers looking to purchase a variety of day-to-day items from the one place while physical retail was restricted. This sub-category recorded a similar peak in November, during the Cyber Sales.

Wholesale marketplaces are investing heavily in their digital capabilities to make it easier for retailers to manage their day-to-day processes, spend more time growing their business and prepare for rapid demand changes.

“As a B2B marketplace, customers (retailers) are shopping seasons ahead with TradeSquare. With shipping, our current focus is transparency. We’ve built a centralised platform that provides single log-in for buyers so that they have the visibility of their purchases from dispatch to delivery and do it all in one place.”

- Quentin Williams, Head of Marketplace at TradeSquare

Distribution of online purchases for specialty retailers



Fashion & Apparel

6.2 mil

households purchased from Fashion & Apparel retailers in 2021

Almost 67.3% of all households shopping online

Fashion & Apparel 25.7%
Variety Stores 8.6%

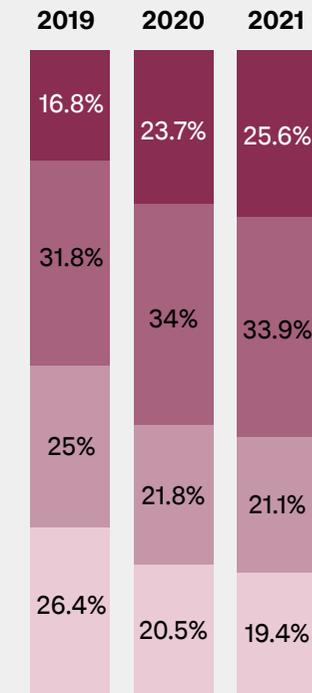


Click to watch video

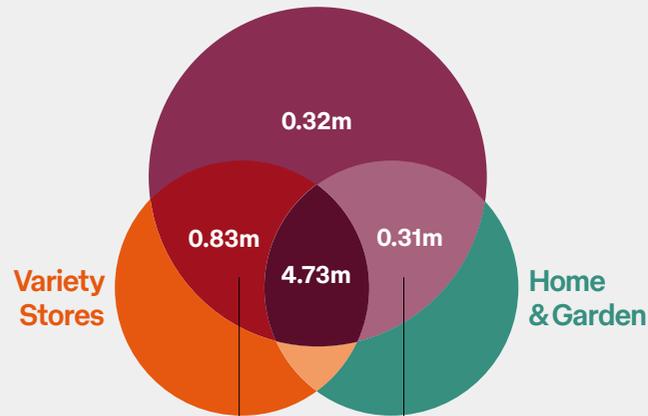
“With the shift to working at home, people are buying more Athleisure. In 2022, customers will be expecting faster and on-demand deliveries. The ability to provide same day delivery is a huge win for us.”

- Lisandro Paz and Benn Martiniello, Co-Founders at Elite Eleven Sporting

How often did they shop?



Fashion & Apparel



90% of these shoppers also purchased from Variety Stores

81% of these shoppers also purchased from Home & Garden

Where else did they shop?

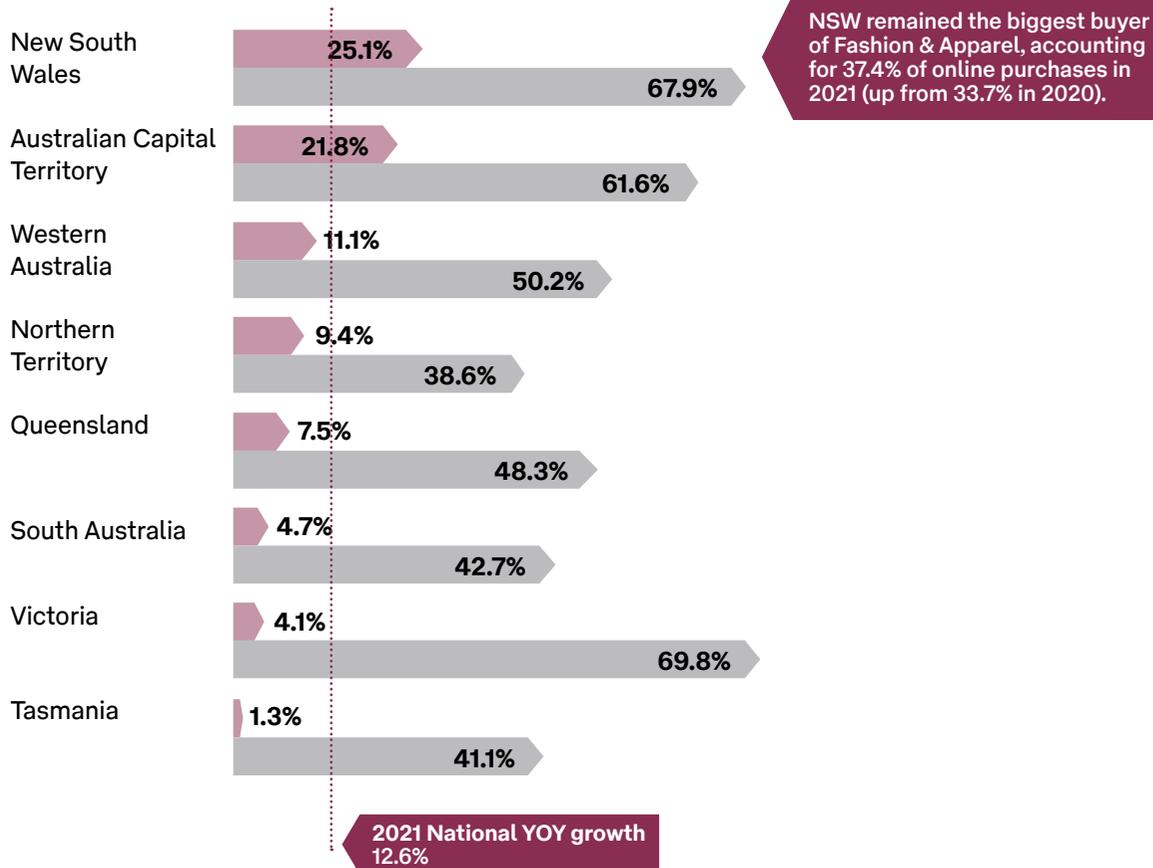
12+ times a year
4-11 times a year
2-3 times a year
Once a year

Fashion & Apparel 2021 eCommerce snapshot

Fashion & Apparel purchases slowed in 2021, after high growth in 2020 across all States and Territories. New South Wales led the growth in 2021 while Victoria was the top performer when compared to 2019.

State growth

■ YOY growth in purchases
■ Growth compared to 2019



Which postcodes are most likely to buy from Fashion & Apparel retailers?



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Rouse Hill, NSW 2155
3. Liverpool, NSW 2170



Top buying locations by households

1. Menai, NSW 2234
2. Bulli, NSW 2516
3. Seaforth, NSW 2092



Our predictions for future growth

1. Karana Downs, QLD 4306
2. Strathfieldsaye, VIC 3551
3. Melton South, VIC 3338



Discover more of the top suburbs for Fashion & Apparel with our [eCommerce suburb pulse check](#).

Metro areas
13.6% YOY growth

Regional areas
9.8% YOY growth



Fashion & Apparel 2021 eCommerce highlights

The entire Fashion & Apparel category saw steady growth across the 2021 calendar year. Athleisure and Footwear were the outliers, with both of these sub-categories seeing significant growth through July and August.

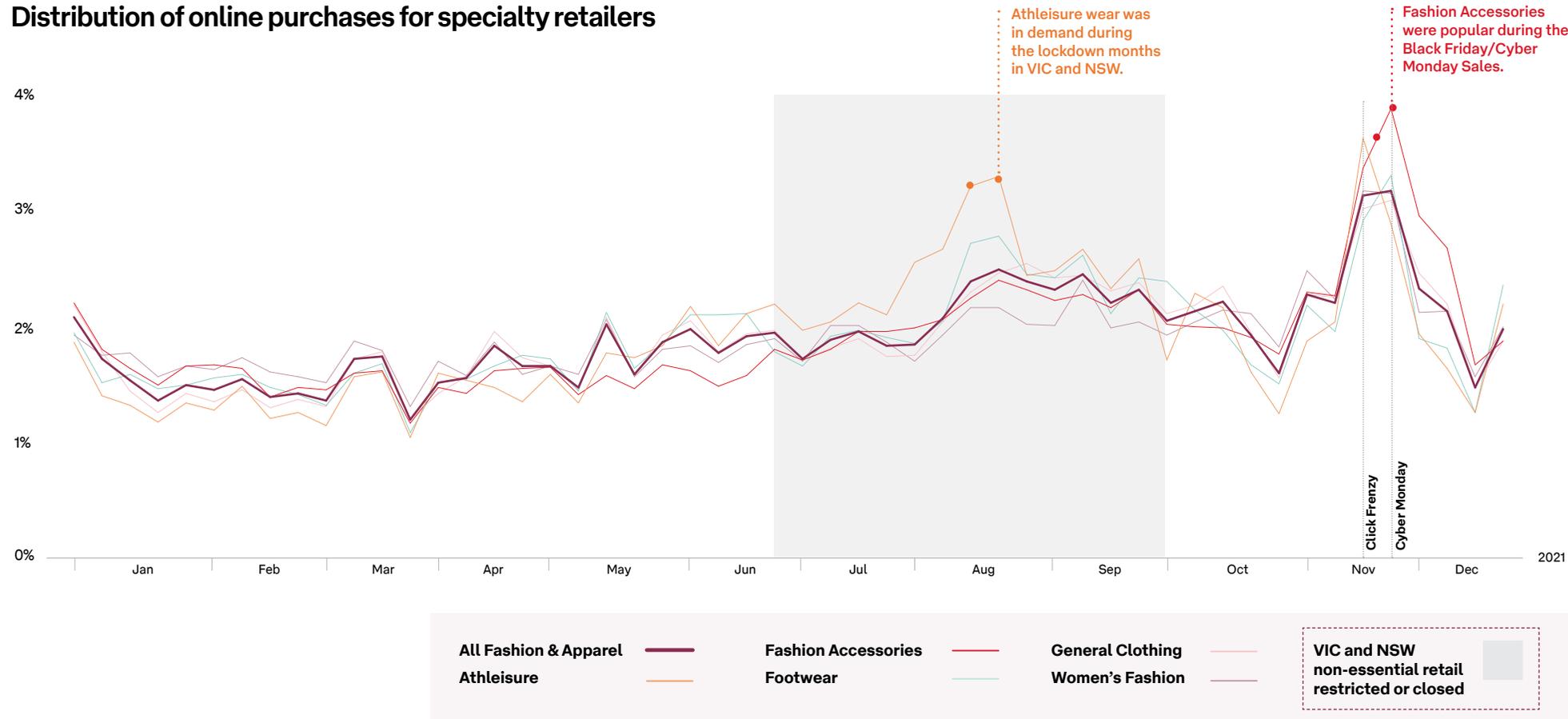
In what's become an annual trend, Cyber Week saw the biggest uplift in purchases as people made a jump start on Christmas shopping, and bagged bargains as they prepared for the busy party season.

Apart from actively participating in sales events, some retailers adopted new technology to provide a better customer experience throughout the online shopping journey.

“We implemented a new Hero Platform which allows for richer customer engagement, including live chat, video calls, shared photos and videos, product cards, etc. This platform is not only used by our customer experience team to facilitate sales process, but also by store teams to serve customers online.”

**- Kasie Heathcote, Group General Manager
– Digital & Loyalty at Accent Group Limited**

Distribution of online purchases for specialty retailers



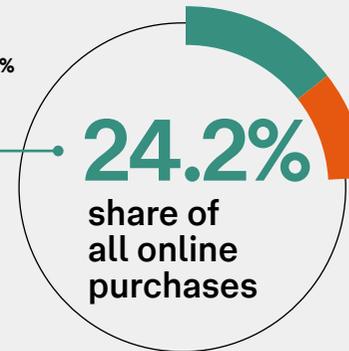
Home & Garden

6.6 mil

households purchased from Home & Garden retailers in 2021

Almost 72.1% of all households shopping online

Home & Garden 14.7%
Variety Stores 9.5%

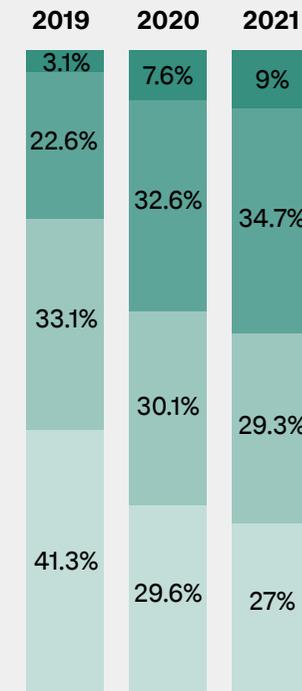


[Click to watch video](#)

“Some of our most loyal shoppers come to us anywhere between 12-15 times a year. Knowing more insights allows us to collaborate with brands that fall under the beauty and fashion umbrella.”

- Olivia Carr, Founder at Shhh Silk

How often did they shop?



Where else did they shop?

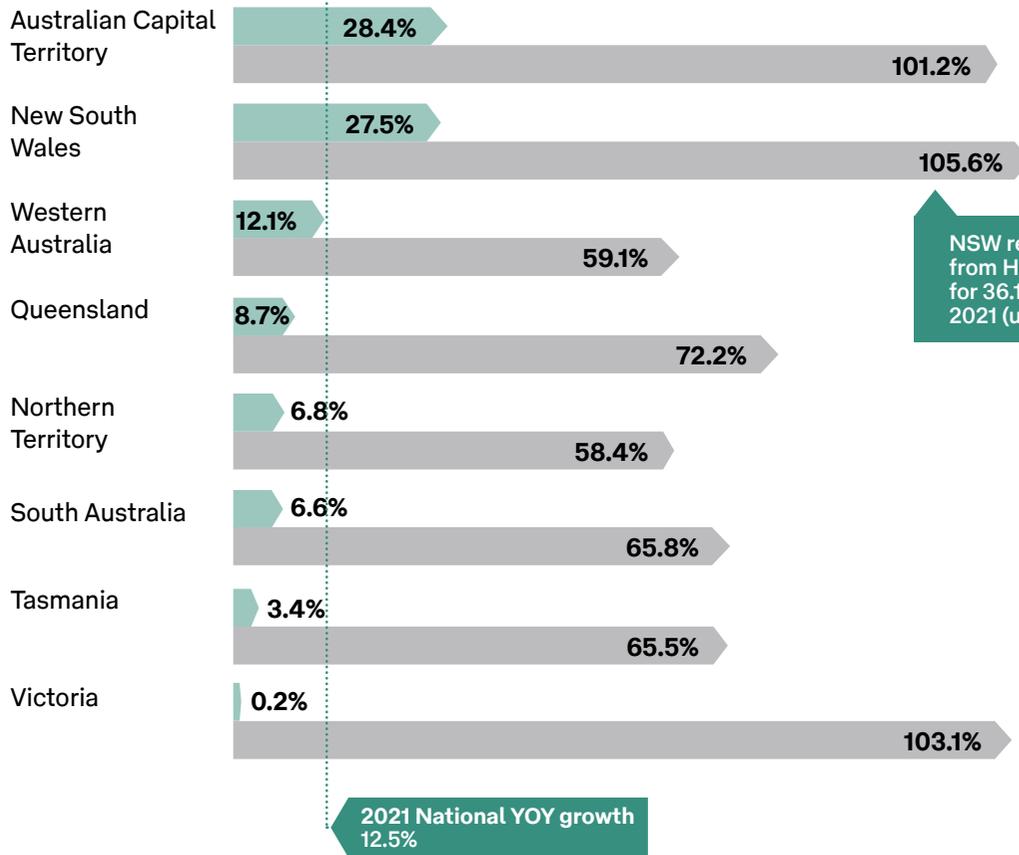
12+ times a year
4-11 times a year
2-3 times a year
Once a year

Home & Garden 2021 eCommerce snapshot

Home & Garden purchases slowed in 2021, after dramatic growth in 2020 across all States and Territories. ACT saw the highest growth in 2021 while New South Wales was the top performer when compared to 2019.

State growth

■ YOY growth in purchases
■ Growth compared to 2019



NSW remained the biggest buyer from Home & Garden, accounting for 36.1% of online purchases in 2021 (up from 31.9% in 2020).

Which postcodes are most likely to buy from Home & Garden retailers?



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Cranbourne, VIC 3977
3. Hoppers Crossing, VIC 3029



Top buying locations by households

1. Helensburgh, NSW 2508
2. Silverdale, NSW 2752
3. Picton, NSW 2571



Our predictions for future growth

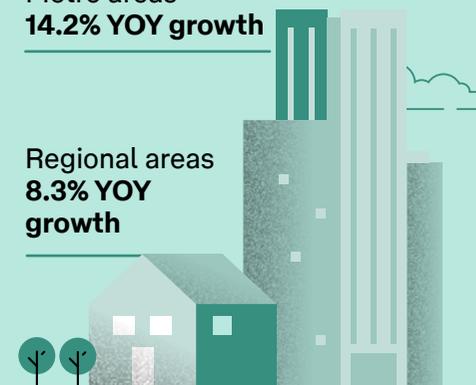
1. Riverstone, NSW 2765
2. Fraser Rise, VIC 3336
3. Mount Duneed, VIC 3217



Discover more of the top suburbs for Home & Garden with our [eCommerce suburb pulse check](#).

Metro areas
14.2% YOY growth

Regional areas
8.3% YOY growth



Home & Garden 2021 eCommerce highlights

For the majority of the year, sales across Home & Garden sub-categories were relatively stable, with some peaks coinciding with lockdowns and major sales events.

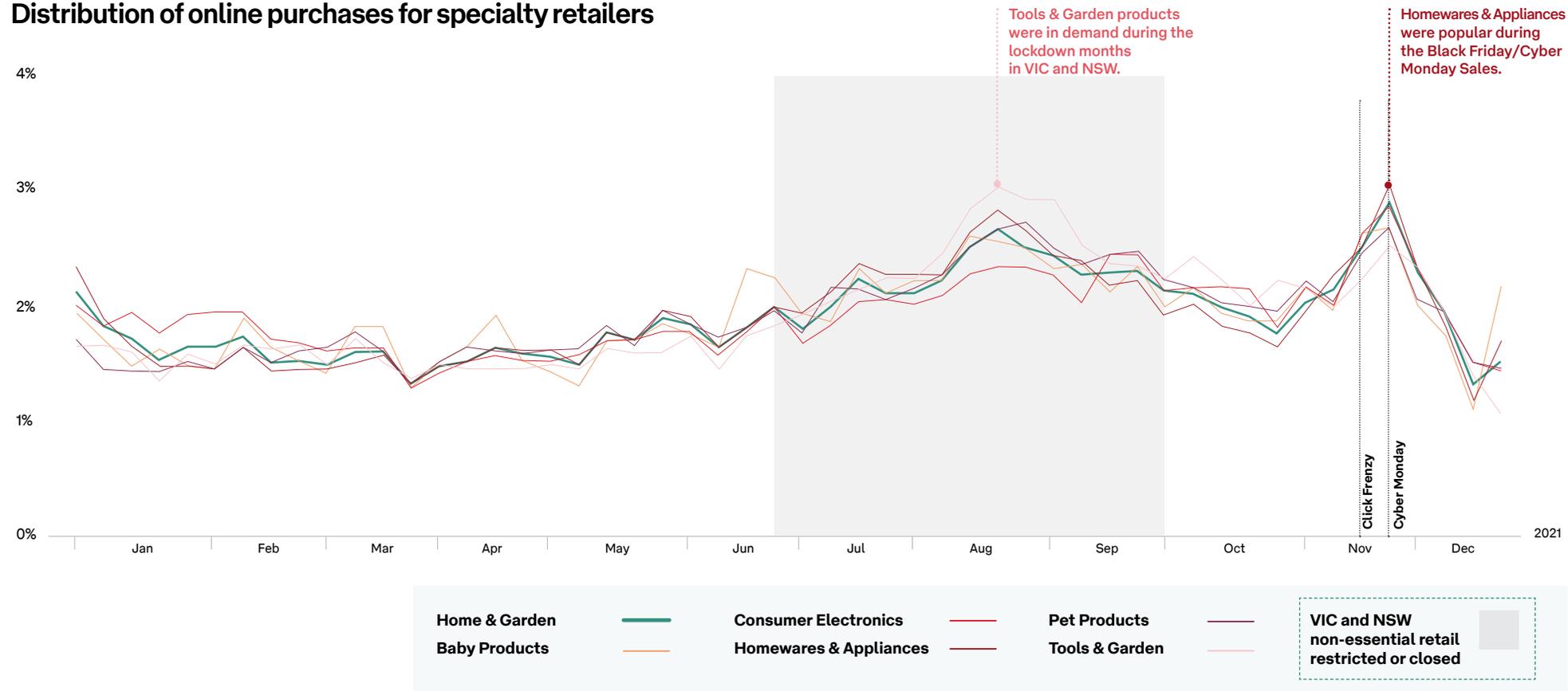
On a sub-category front, Tools & Garden products and Homewares & Appliances were among the most popular, with the former peaking in August, and the latter during the Cyber Sales.

As sales events tend to attract more shoppers, savvy retailers are focusing on loyalty and subscription programs to retain customers and achieve higher lifetime value.

“WAG’s loyalty program ‘The Good Dog Club’ and subscription model are both high drivers of customer retention. Customers are looking for value and convenience, and our subscription retention rate of 90% shows it’s hitting the mark.”

- Rama Kannan, Senior E-Commerce Specialist at WAG

Distribution of online purchases for specialty retailers



Health & Beauty

4.7 mil
households purchased from
Health & Beauty retailers in 2021

Almost 51.2% of all
households shopping online

Health & Beauty 8.9%
Variety Stores 2.5%

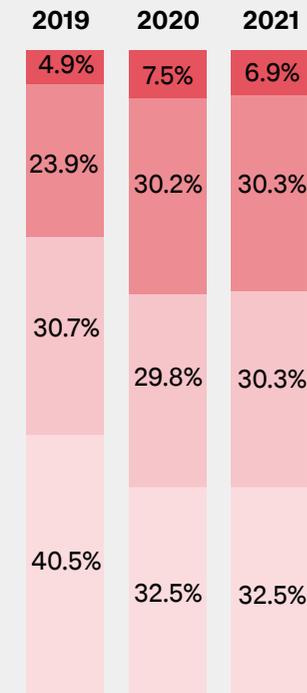


“We’re now seeing customers
shop with us more than 10 times
a year for their everyday smile
care and oral care needs.”

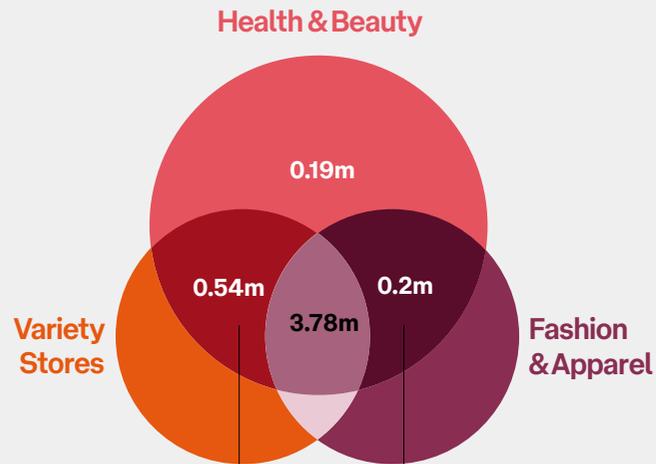
- Alex Tomic & Nik Mirkovic, Co-Founders
at Hismile

[Click to watch video](#)

How often did
they shop?



12+ times a year
4-11 times a year
2-3 times a year
Once a year



92% of these shoppers
also purchased from
Variety Stores

84% of these shoppers
also purchased from
Fashion & Apparel

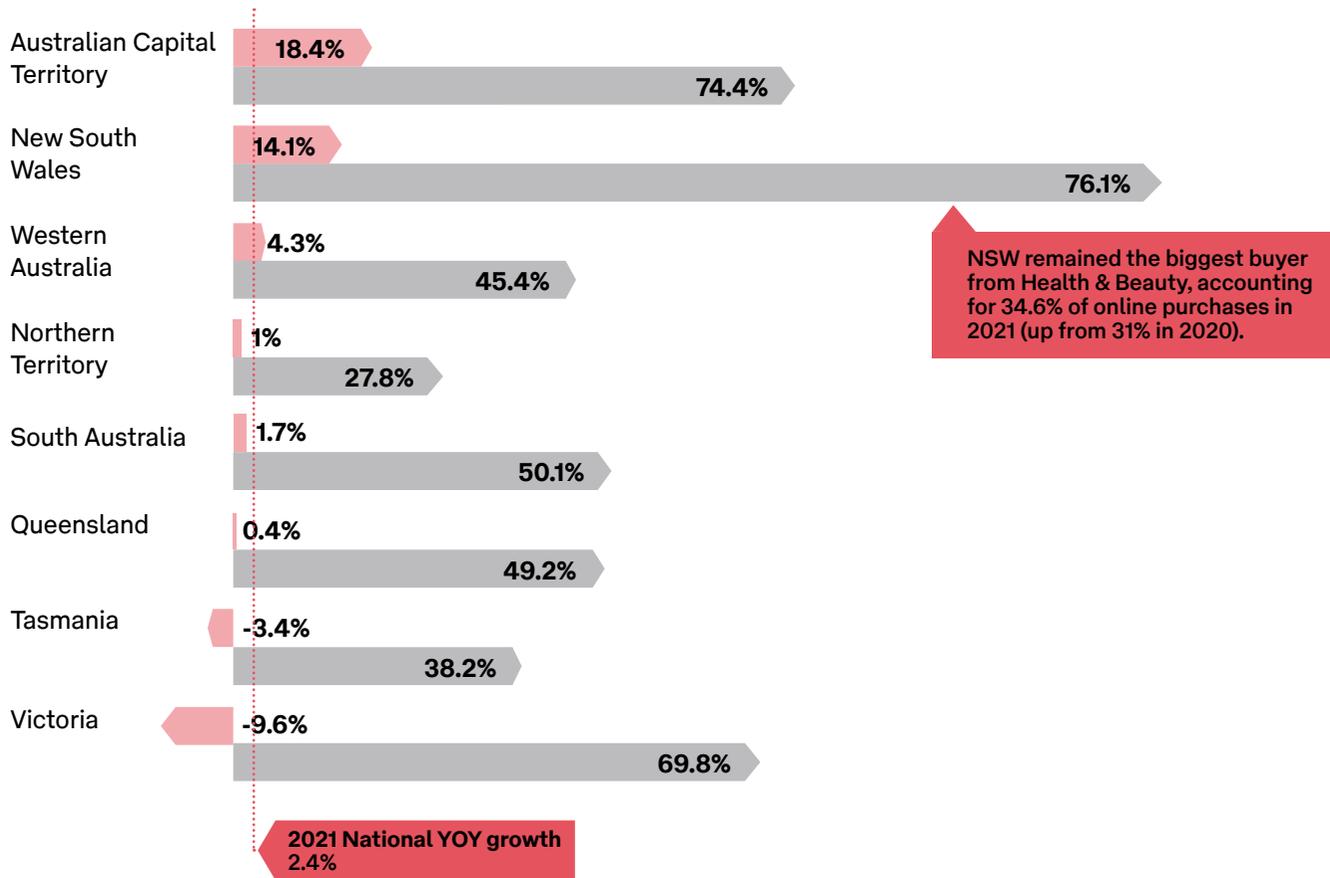
Where else did they shop?

Health & Beauty 2021 eCommerce snapshot

Health & Beauty purchases slowed in 2021, after high growth in 2020 in most States and Territories except Tasmania and Victoria. ACT saw the highest growth in 2021 while New South Wales was the top performer when compared to 2019.

State growth

■ YOY growth in purchases
■ Growth compared to 2019



Which postcodes are most likely to buy from Health & Beauty retailers?



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Rouse Hill, NSW 2155
3. Cranbourne, VIC 3977



Top buying locations by households

1. Glenhaven, NSW 2156
2. Menai, NSW 2234
3. Vaucluse, NSW 2030



Our predictions for future growth

1. Caloundra, QLD 4551
2. Ballina, NSW 2478
3. Armadale, WA 6112



Discover more of the top suburbs for Health & Beauty with our [eCommerce suburb pulse check](#).

Metro areas
2.9% YOY growth

Regional areas
0.7% YOY growth



Health & Beauty 2021 eCommerce highlights

Health & Beauty purchases remained steady across the year, with spikes during sales events and non-essential retail restrictions.

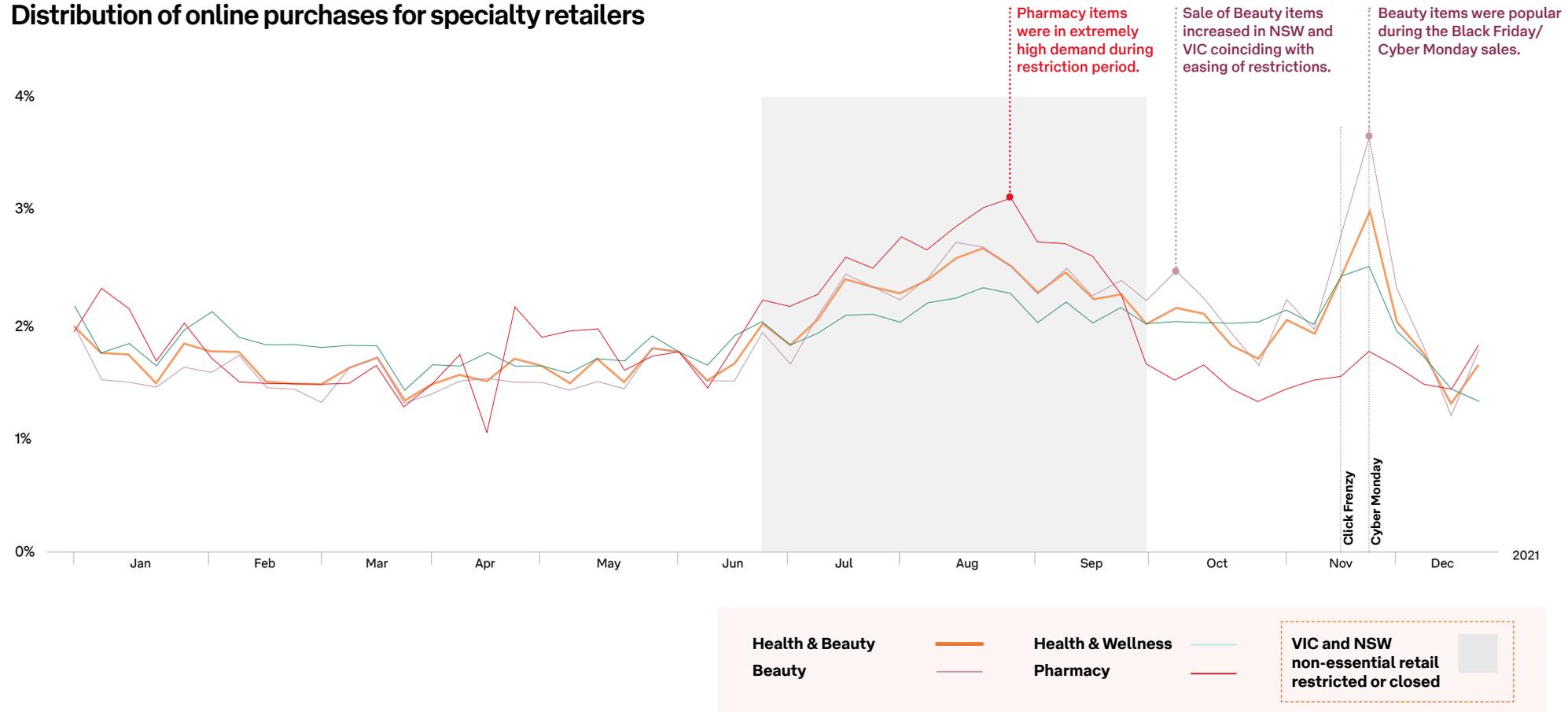
Like other categories, it experienced the biggest peak of 2021 over Black Friday/Cyber Monday, with Beauty items leading the way at this time.

With more retailers participating in sales events, some are paying close attention to highly correlated categories to find new opportunities to grow their customer base.

“We keep a close eye on complementary industries, as consumer trends that start in fashion often trickle down to health, beauty, wellness and lifestyle.”

- Catie O’Neill & Olivia Burrows, Owners and Co-Founders at My Glow 2

Distribution of online purchases for specialty retailers



Hobbies & Recreational Goods

4.5 mil

households purchased from Hobbies & Recreational Goods retailers in 2021

Almost 48.8% of all households shopping online

- Hobbies & Recreational Goods 7.1%
- Variety Stores 6.4%

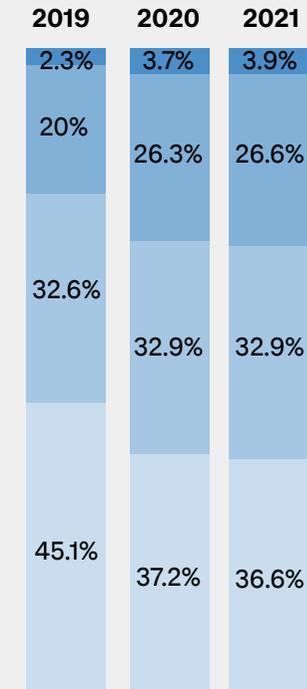


[Click to watch video](#)

“Considering the other eCommerce categories that our customers buy from definitely helps us when it comes to our marketing.”

- Greg Mulligan & Dan Spriggs, Co-Founders at SERVD

How often did they shop?



92% of these shoppers also purchased from Variety Stores

85% of these shoppers also purchased from Home & Garden

Where else did they shop?

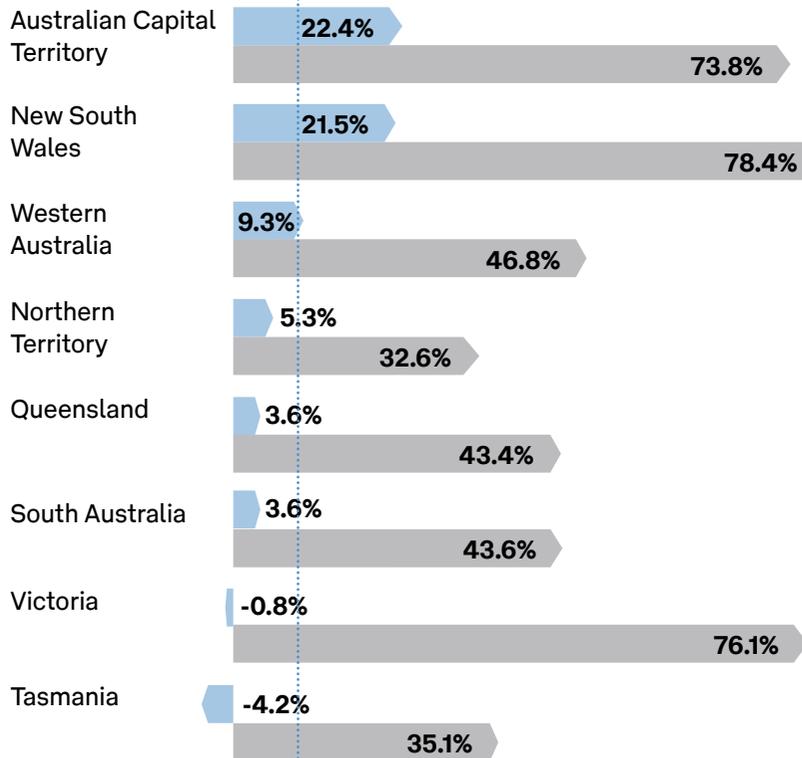
- 12+ times a year
- 4-11 times a year
- 2-3 times a year
- Once a year

Hobbies & Recreational Goods 2021 eCommerce snapshot

Hobbies & Recreational Goods purchases slowed in 2021, after high growth in 2020 in most States and Territories except Tasmania and Victoria. ACT saw the highest growth in 2021 while New South Wales was the top performer when compared to 2019.

State growth

■ YOY growth in purchases
■ Growth compared to 2019



NSW remained the biggest buyer from Hobbies & Recreational Goods, accounting for 33.7% of online purchases in 2021 (up from 30.1% in 2020).

2021 National YOY growth
8.4%

Which postcodes are most likely to buy from Hobbies & Recreational Goods retailers?



Top buying locations by purchase volume

1. Point Cook, VIC 3030
2. Cranbourne, VIC 3977
3. Wyong, NSW 2259



Top buying locations by households

1. Bargo, NSW 2574
2. Helensburgh, NSW 2508
3. Silverdale, NSW 2752



Our predictions for future growth

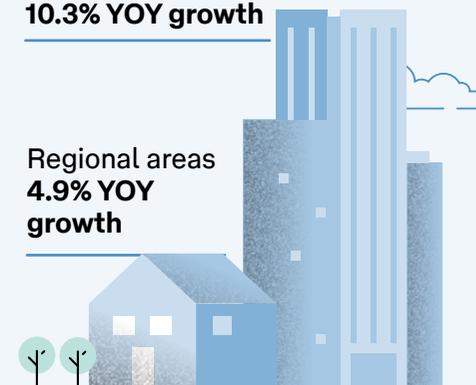
1. Ballina, NSW 2478
2. Success, WA 6164
3. Armadale, WA 6112



Discover more of the top suburbs for Hobbies & Recreational Goods with our [eCommerce suburb pulse check](#).

Metro areas
10.3% YOY growth

Regional areas
4.9% YOY growth



Hobbies & Recreational Goods 2021 eCommerce highlights

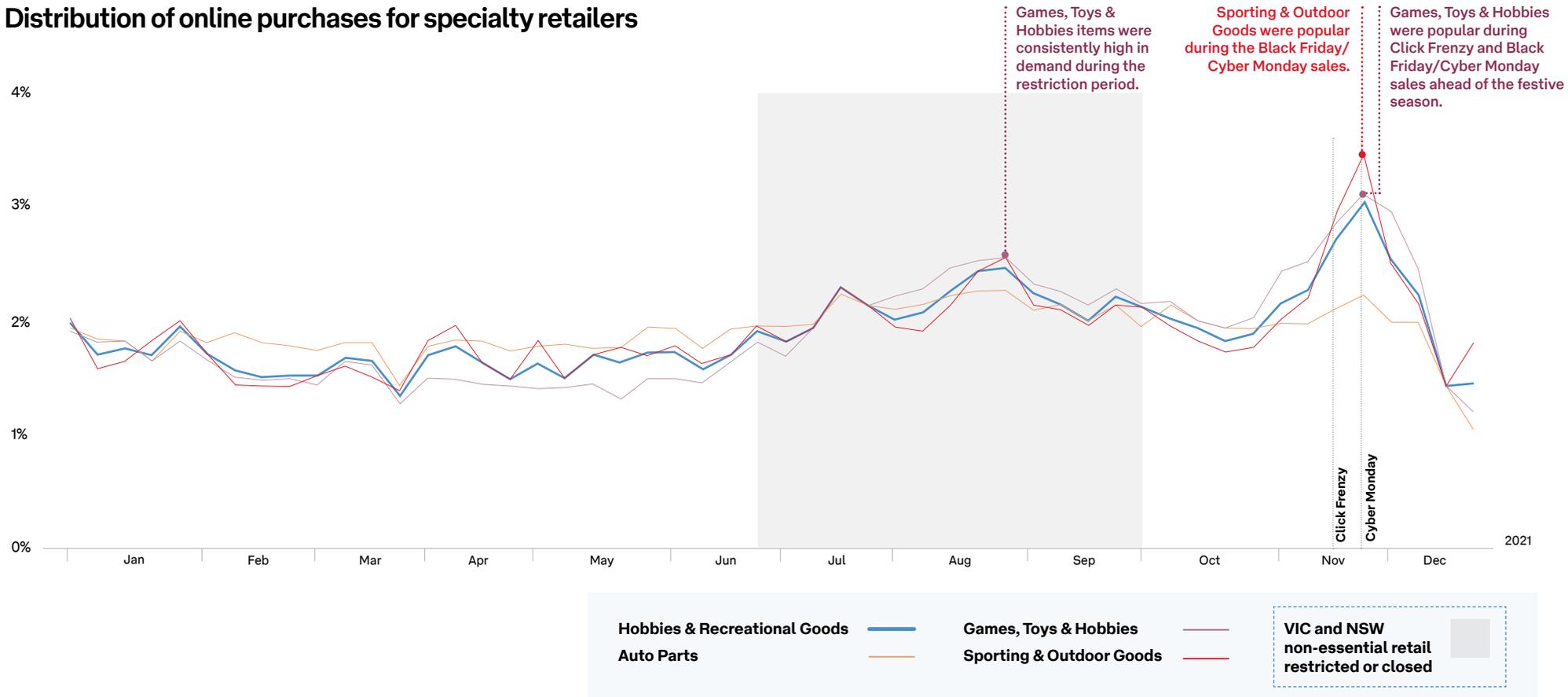
Hobbies & Recreational Goods purchases spiked mostly during sales events, with moderate impact from non-essential retail restrictions. Sales during Black Friday reached peak level for the whole year and were much higher than other times.

As more people are focusing on living a healthier and more active lifestyle, demand for this category has remained stable following the easing of retail restrictions. Some retailers also stated that this online market is to be sustained as customers are evolving, which gives them the opportunity to expand.

“ Our customer is evolving, which gives us the opportunity to expand. As they learn more about the sport, the products they’re searching for and purchasing are changing and maturing. It’s our job to keep up with that.”

- Alan Spender, Head of Marketing at Pushys

Distribution of online purchases for specialty retailers



Specialty Food & Liquor

2.9 mil

households purchased from Specialty Food & Liquor retailers in 2021

Almost 31.4% of all households shopping online

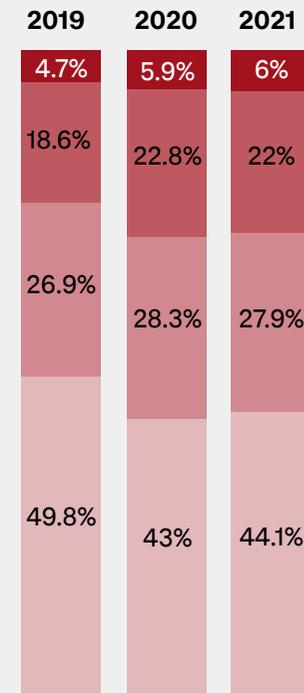


[Click to watch video](#)

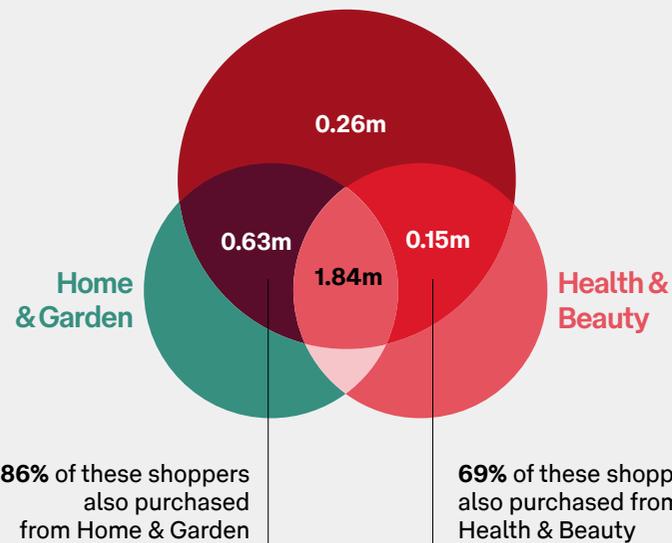
“Our shoppers really moved onto eCommerce, spending a lot more time and money on the internet. They also want more education about the ingredients they are purchasing.”

- Hayden Marks, Founder & CEO at Melbourne Bushfood

How often did they shop?



Specialty Food & Liquor



Where else did they shop?

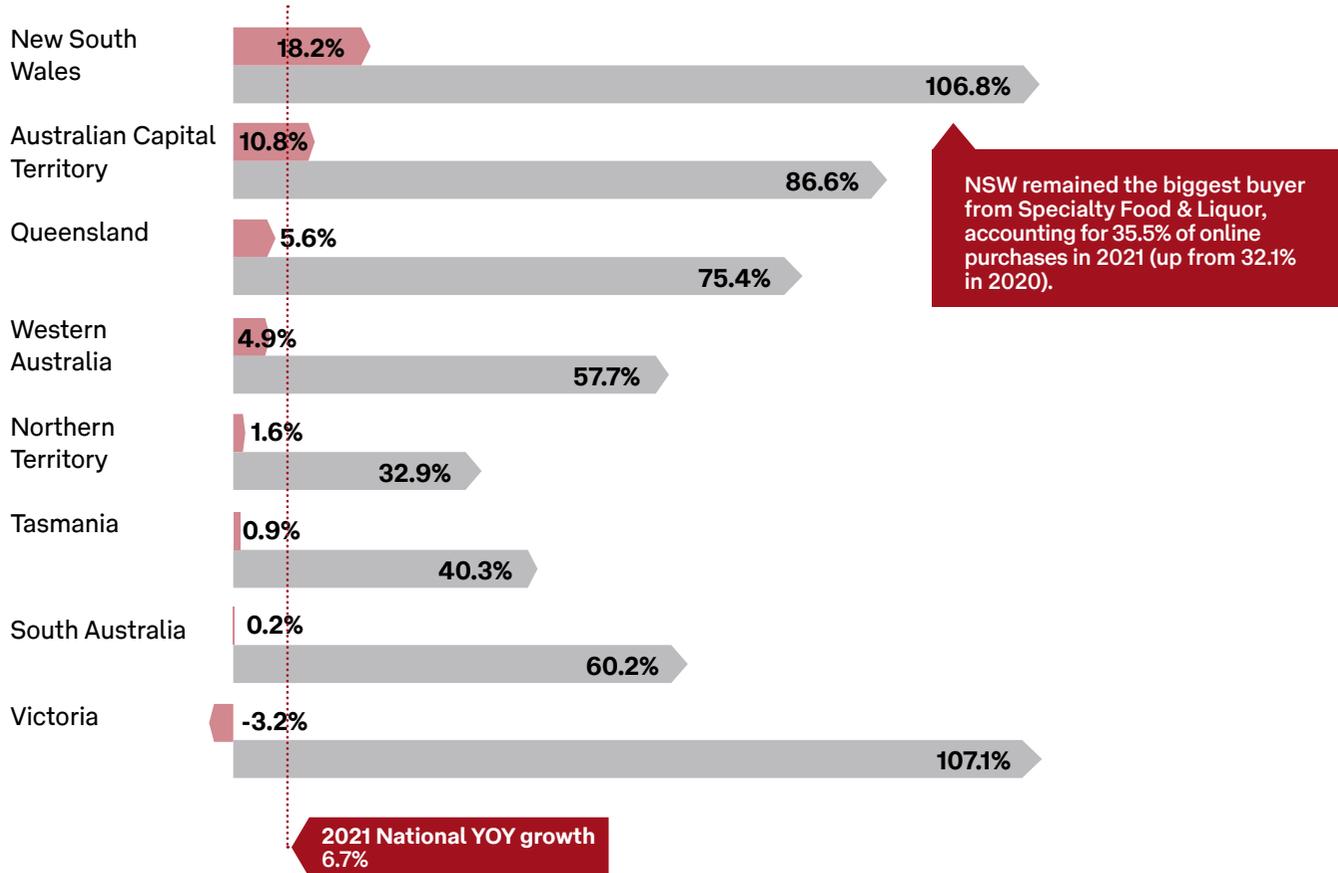


Specialty Food & Liquor 2021 eCommerce snapshot

Specialty Food & Liquor purchases slowed in 2021, after strong growth in 2020 in most States and Territories except Victoria. New South Wales saw the highest growth in 2021 while Victoria was the top performer when compared to 2019.

State growth

■ YOY growth in purchases
■ Growth compared to 2019



Which postcodes are most likely to buy from Specialty Food & Liquor retailers?



Top buying locations by purchase volume

1. Mosman, NSW 2088
2. Point Cook, VIC 3030
3. Rouse Hill, NSW 2155



Top buying locations by households

1. Northbridge, NSW 2063
2. Hunters Hill, NSW 2110
3. Roseville, NSW 2069



Our predictions for future growth

1. North Ryde, NSW 2113
2. Cronulla, NSW 2230
3. Baulkham Hills, NSW 2153



Discover more of the top suburbs for Specialty Food & Liquor retailers with our [eCommerce suburb pulse check](#).

Metro areas
6.5% YOY growth

Regional areas
6.9% YOY growth



Specialty Food & Liquor 2021 eCommerce highlights

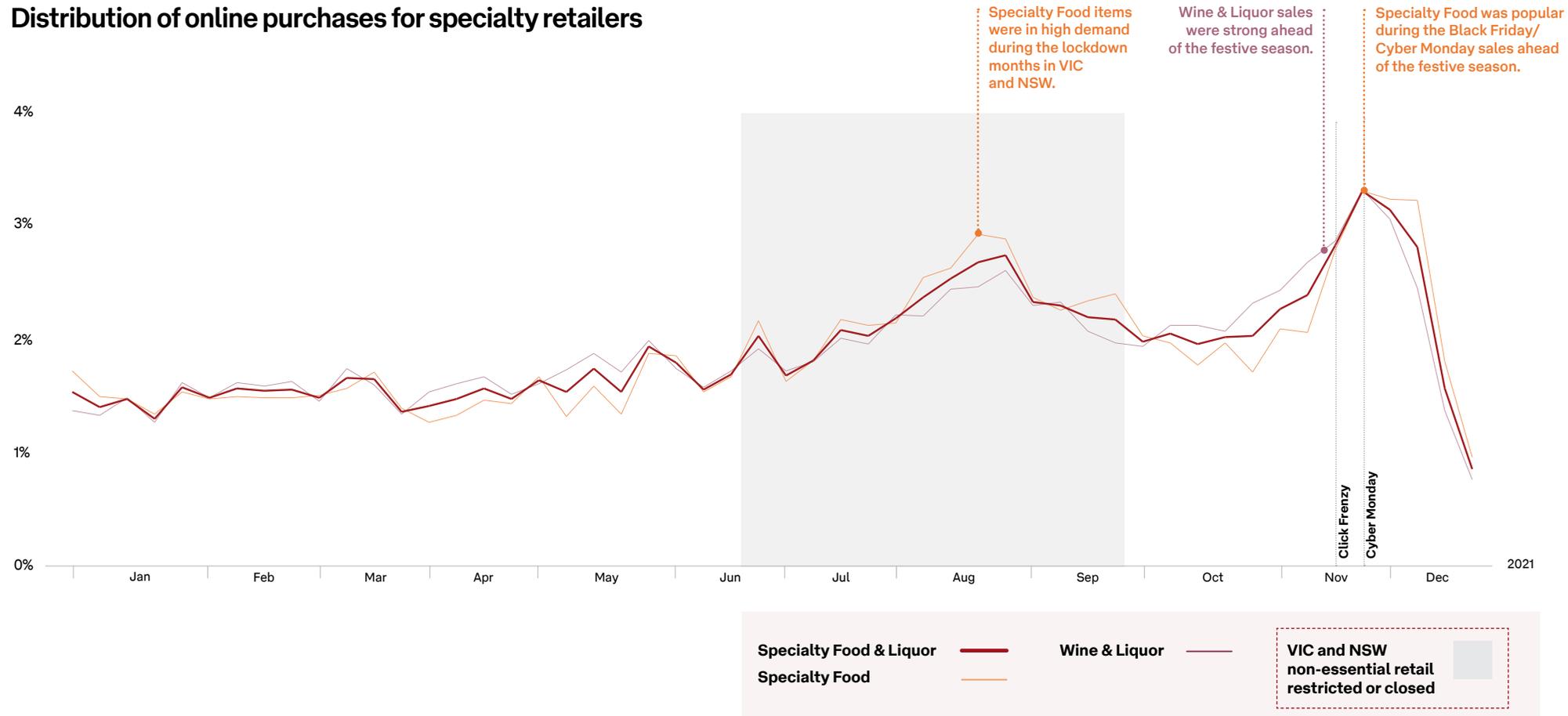
The Specialty Food & Liquor segment enjoyed its highest peak of 2021 during Black Friday, but also saw increases during non-essential retail restrictions. Specialty Food items were in highest demand during July and August, while Wine & Liquor began to trend upwards through October and November, peaking during the Cyber Sales as people stocked up ahead of the holiday season.

Shoppers were still actively buying online while physical stores started to reopen. Some retailers found their customers still prefer to have their goods delivered given lifestyles have evolved. This indicates that digital demand will remain strong and should be an ongoing focus for businesses.

“ Even as workplaces reopen, many Australians continue to work from home in some capacity. As such, demand for café-quality coffee at home has remained stronger than ever.”

- Jean-March Dragoli, General Manager at Nespresso Oceania

Distribution of online purchases for specialty retailers



Methodology

The main sections of this report are based on the analysis of 2019, 2020 and 2021 parcels data recorded by the Australia Post Group, unless otherwise stated. Commentary in this report relating to online shopping is based on an extrapolation of this data.

New shoppers are defined as residential households that prior to the month of their most recent online purchase, did not receive an eCommerce parcel in the previous 12 months.

The data and insights are reported at postcode, State and Territory, metro and regional Australia levels. For ease of reference, postcodes are substituted with suburb or locality names where appropriate. In instances where more than one suburb shares a postcode, one location name is referenced.

The top online shopping locations in the 'State of eCommerce', 'Shopper Habits' and 'Specialty Retailers' sections excludes postcodes with low household counts.

The household online purchase frequency and shopper cohorts in the 'Shopper Habits' and 'Specialty Retailers' sections excludes residential households that received an excessive number of parcels per year to remove outliers from the distribution.

Postcodes listed in the 'State of eCommerce' and 'Specialty Retailers' section under:

- 'Top buying locations by purchase volume' are derived from the number of parcels in that location.
- 'Top buying locations by households' are derived from the number of parcels received per household in that location.
- 'Our predictions for future growth' are modelled on population and household growth, as well as online shopping participation in that location.

Specialty retailers are segmented into product categories: Variety Stores, Fashion & Apparel, Health & Beauty, Home & Garden, Hobbies & Recreational Goods, Media and Specialty Food & Liquor.

The retailer sectors are segmented into four groups based on business models and sizes: Bricks & Clicks, Marketplaces, Digital Natives (exclude marketplaces) and Big Brands.

In the 'The Future of eCommerce' section:

- Lockdown months refer to months when restrictions for non-essential retail were in place for more than two weeks in 2020 or 2021, and include: national lockdown in April and May 2020, Victoria lockdown from July to October 2020, ACT lockdown from August to October 2021, New South Wales lockdown from July to October 2021 and Victoria lockdown from August to October 2021. Non-lockdown months refer to other months from April 2020 to December 2021.
- The average YOY growth during non-lockdown months in 2021 is derived from June, November and December when there were no restrictions in both 2020 and 2021. The corresponding average YOY growth numbers in 2019 and 2020 are also derived from the same months.

In the 'Specialty Retailers' section, online share split by category is derived from Australia Post Monthly Consumer Survey results for 2021 (n>24K).

The report also draws on: modelled estimates from Australia Post consumer surveys and International Post Corporation surveys, statistics from the Australian Bureau of Statistics (ABS), online retail environment data from CommBank iQ and publicly available information.

References

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Authors

Ben Franzi
Group General Manager
Strategy & Simplification

Rose Yip
Head of eCommerce Data & Analytics

Edward Jones
Senior eCommerce Data Analyst

Shirley Yu
eCommerce Data Analyst

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