



Inside Australian Online Shopping

2018 eCommerce Industry Paper

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About this paper

This annual paper, in its third year, is an in-depth study into consumer online shopping behaviour and trends in Australia. The report is based on an analysis of goods bought online and delivered by Australia Post between January 2016 and December 2017. Percentage growth and share figures are based on deliveries, unless otherwise stated.

For the first time, we have featured a 'Beyond Australia' section in the report, which looks into a selection of established and emerging global eCommerce markets, and provides a focus on our learnings in China.



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Foreword

Australian retail is noisy, complex and fast-paced. Shoppers' expectations around convenience, value and choice have driven a higher proportion to shop online, where they have access to a world of information, products and services at their fingertips.

We've moved from a simple combination of online and bricks and mortar, to online shopping across multiple devices and in-store 'experiences'. Touching and trying products, testing to see how they integrate with our lives, how they make us look, and most importantly, how they make us feel.

The industry is calling this 'new retail' - where consumers have multiple experiences with a brand or product, across a number of platforms.

Across the world, different markets are offering unique ways for consumers to experience and purchase products. The shift of buying power from the US and Europe to China and South East Asia has begun, driven by the burgeoning rise of consumers accessing ecommerce marketplaces.

In Australia, this represents huge opportunities for our retail industry. Our close proximity to China and South-East Asia means we can offer the region quality, trusted brands through cross border trade or via physical experiences such as tourism, where visitors to Australia are at a record high.

Australian goods are highly sought after and valued, and our reputation for being clean, green, and authentic gives Australian businesses a distinct advantage.



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So how do retailers make the most of these local and international opportunities? The third edition of Inside Australian Online Shopping will arm your business with information, data and insights, which are the most powerful asset to your competitive advantage in the marketplace. Understanding the changing expectations around customer experience and differentiating your business in the market will help your business achieve success and keep you ahead of the competition.

The 2018 report provides an in-depth look at online shopping and delivery trends across Australia, growth patterns and insights on popular products bought online, where the nation's most frequent online shoppers live and our predictions for future growth areas. For the first time ever, we've looked beyond Australia, incorporating international data and advice for key international markets where we have established partnerships on the ground with major players.

By aligning our data and insights with your passion for your business, we hope this report becomes a valuable guide to growing your business and eCommerce in Australia.



Ben Franzi

General Manager,
Parcel & Express Services

A handwritten signature in black ink that reads "Ben Franzi".



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Executive summary

Retailers need to have a consistent offering on one integrated ecosystem across online and in-store in order to effectively compete and grow.

Looking back to 2015, less than 10% of Australians used a smartphone to make an online purchase, Afterpay launched its first product, and online spend on physical goods grew by a mere 6%.

Fast forward to 2017, and one in five online purchases were made from a mobile device, payment services such as Afterpay had attracted over 1.5 million customers, and online spending grew by 18.7%¹.

A new generation of consumers are reshaping the face of online shopping. Australia's 18 to 36 age demographic has increased by half a million people since the last census, now representing 26% of the total Australian population. This group values flexibility and transparency, and embraces new technology and services.

Shoppers demand a frictionless end-to-end shopping experience, with easy access across all devices, simple payment options and convenience across all touch points. They also expect flexibility in delivery timeframes and collection locations.

As a result, retailers need to have a consistent offering on one integrated ecosystem across online and in-store in order to effectively compete and grow.



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Variety
StoresHealth &
BeautyHomewares &
AppliancesHobbies &
Recreational
Goods

In 2017, marketplaces and discount department stores were the favourite destination sites for online shoppers, with purchases via these channels growing over 50%. Consumers can access a range of price comparison sites and are more aware of their options. The growth of online sales events, such as Black Friday and Click Frenzy, is also changing consumer buying behaviour. More shoppers are holding off on purchases until these events, to potentially 'grab a bargain', meaning retailers have to manage fluctuating inventory levels and fulfilment challenges.

This report provides a rich analysis of Australian consumer buying behaviour and what consumers internationally are buying from Australian retailers. The paper aims to help businesses of all sizes and industries refine how they interact with customers, identify new market opportunities and meet rapidly changing consumer expectations.



eCommerce overview

By 2020,
we predict
that 1 in 10
items will be
bought online.



Online shopping in Australia reached 8% of total traditional retail sales at the end of 2017, a one percentage point rise on the year before.

Australians spent \$21.3 billion buying goods online¹, an increase of 18.7%. The online spending growth outstripped traditional retail by 16.2 percentage points.

While there is a discernible and growing shift towards online channels, traditional retail sales excluding cafes and restaurants still accounted for \$267.4 billion spent² in 2017.

When it comes to the number of purchases, the growth is even more pronounced. Purchases were up 19.2% in 2017, after an 11.5% rise in 2016. We expect that by 2020, one in 10 items will be bought online.

Australians are buying online more frequently, but spending slightly less per purchase. This is likely due to the growing competitiveness of the eCommerce landscape.

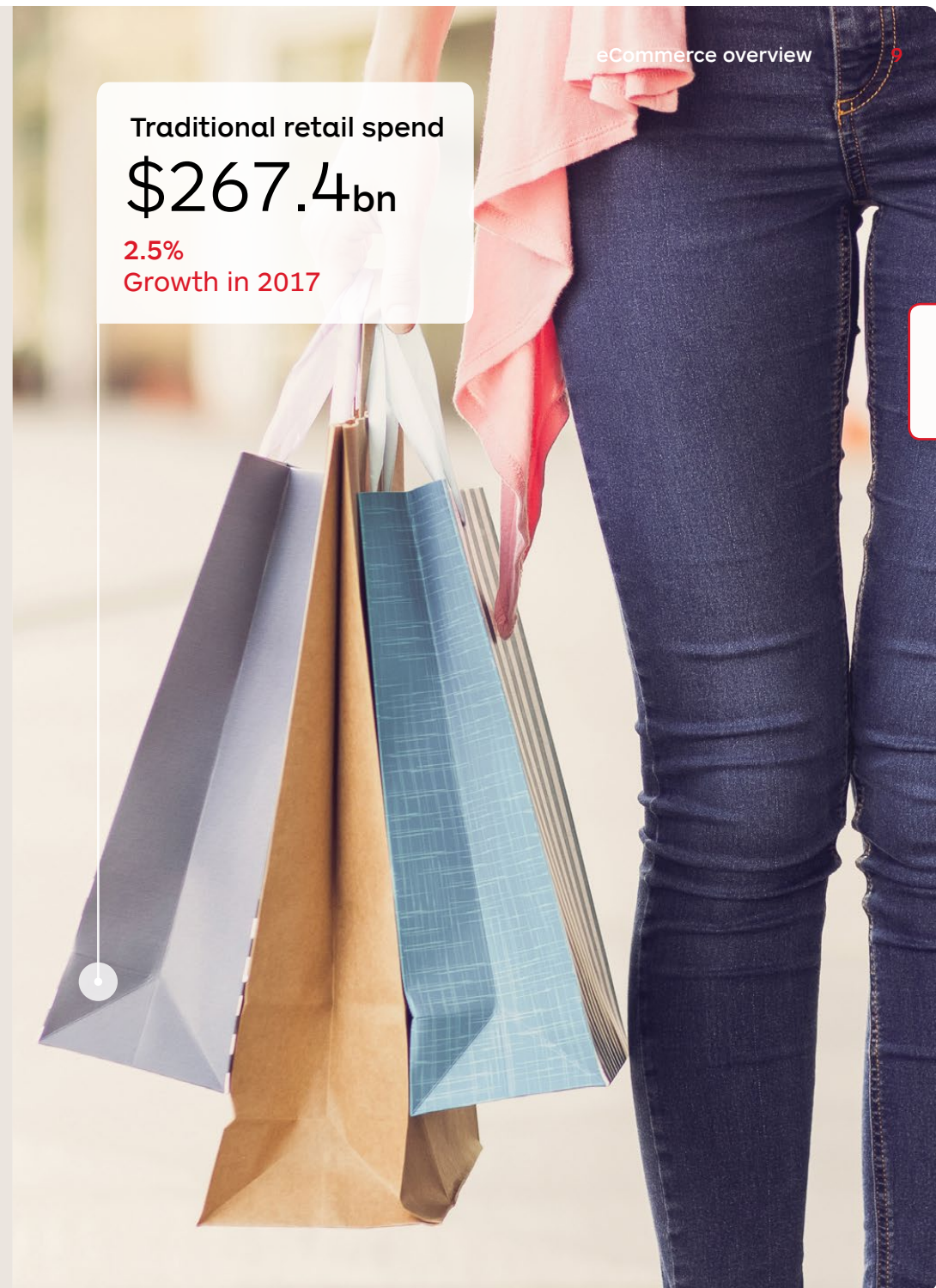
The overall perception of online shopping is positive, with 35% of people anticipating they will buy more online in the future³, up 3.2% on 2016.



**Online goods spend
\$21.3bn**

18.7%

Growth in 2017



eCommerce overview

Traditional retail spend

\$267.4bn

2.5%
Growth in 2017



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Key consumer trends

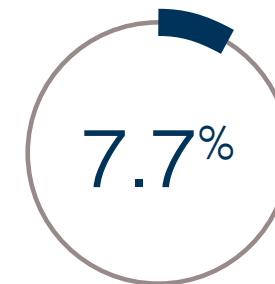
The top four consumer trends in 2017 were the rise in "buy now, pay later" usage, shopping on marketplaces, checkout on a mobile device and popularity of online sales events.

New payment services are changing the game:

Buy now, pay later (BNPL), a digital service that makes it possible to buy a product immediately and pay for the purchase in instalments, continues to gain momentum. Our estimates show that BNPL payments accounted for 7.7% of total online goods spend¹. The service appeals to the 18-39 year old demographic, as it provides instant gratification with low entry level and can also be used as a budgeting tool.

One of Australia's fastest growing online Fashion retailers, Beginning Boutique, has seen an increase in basket size and buying frequency. Purchases have grown by a factor of seven from 2015 to 2017, and it is now their customers' preferred payment method. As more retailers adopt BNPL, the trend is expected to spread quickly to other categories and other demographics.

BNPL payments accounted for 7.7% of total online goods spend in 2017



\$1.6bn

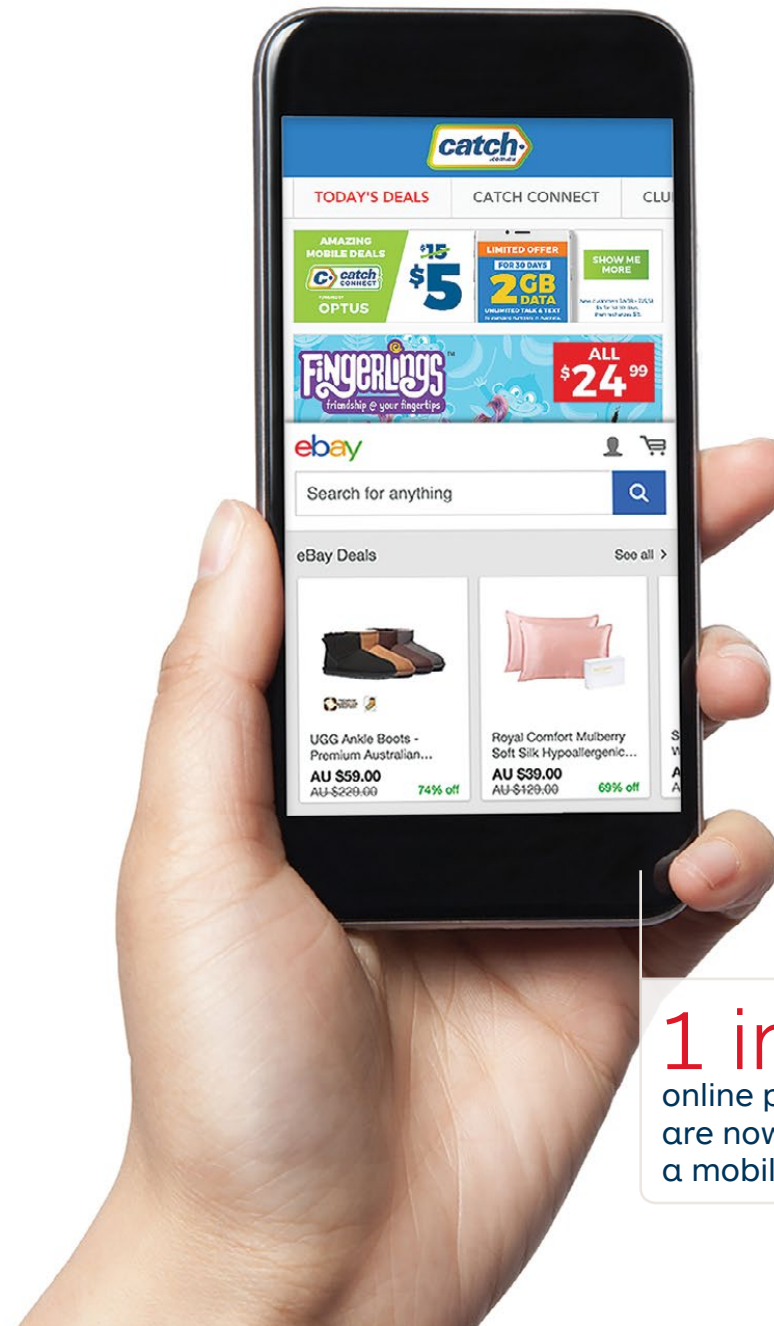


Marketplaces are here to stay

Marketplaces, central platforms where goods are offered by multiple third parties, have boomed in recent years, growing by 74.8% in 2017 alone. Once the sole domain of eBay, Etsy and Redbubble, other players have since joined the party. Retailers such as Catch and Myer have recently opened marketplaces, recognising the benefit of increased customer traffic and expansion into other categories.

Shoppers are becoming more comfortable buying on mobile phones

While shoppers are content with browsing on their phones, they are more reserved in making a purchase. This is starting to change, with purchases from mobile devices growing 58% in 2017, a six percentage point increase from the previous year. By contrast, transactions from desktops and laptops fell 11%. The upside is that one in five online purchases are now made from a mobile device³.



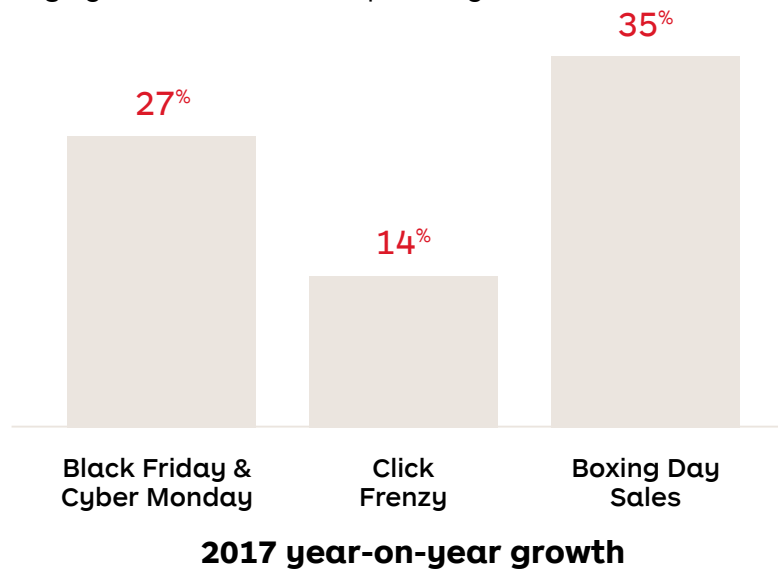
1 in 5
online purchases
are now made from
a mobile device



Sales events are shaping the retail year more than ever

Sales events have become quickly entrenched in the Australian online shopping landscape. Many of these events originated from overseas, such as Black Friday and Cyber Monday, which grew by 27% in 2017. Boxing Day sales also grew by 35% and Click Frenzy sales were up 14% year-on-year³.

The increasing popularity of events has had a marked effect on seasonal growth. Shoppers are choosing to wait for a bargain while retailers are having to manage fluctuating inventory levels and margin erosion. Aside from the traditional sales cycles, the main impact was seen in May and November, with month-on-month growing by 32.2% and 16.7% respectively.



What are Australians buying online?

In 2017, the top three products bought online by spend were consumer electronics, clothing and books³. Marketplaces and discount department stores in the Variety Stores category, were the favourite destination sites for shoppers.

Variety Stores are the 'go to' destination for online goods and services, and were the largest and best performing category in 2017. Fashion and consumer electronics were the most sought after items, representing over 45% of variety store purchases. Marketplace and discount department stores are making an impact, with both growing more than 50% in 2017.

Fashion is changing the traditional retail landscape, with one in three items bought online now a fashion item. The trend is strong, with 2017 being the sixth consecutive year of double-digit growth. Well-defined return options are giving fashion shoppers more confidence when shopping online. Buy now, pay later (BNPL) services are also helping fuel the growth, with 57% of BNPL purchases fashion-related.

Health & Beauty had another strong year of growth, underpinned by 29.4% growth in beauty and cosmetic purchases. Buy now, pay later services are also having a big impact in this sector, with 10% of beauty transactions made using BNPL.

Top 3 products bought online by spend





Homewares & Appliances had a solid year, growing by 10.9%, four percentage point above 2016. This is quite impressive considering a quarter of all variety store purchases relate to homewares and appliances. Overall spending is up, boosted mainly by the average order value for Homewares increasing by 7.4%.

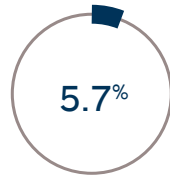
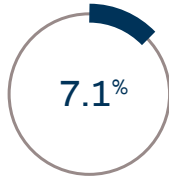
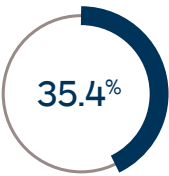
Hobbies & Recreational Goods is one of the smaller online categories, but it covers an extensive product range including Games & Toys, Outdoor Goods, Sporting, Automotive and Musical equipment. The small representation suggests the category is yet to mature and has potential for significant growth, as consumers become more comfortable buying larger and more expensive goods online.

Media is made up of over 80% book purchases. The shift from physical stores to online fuelled the growth in previous years. However, recent rates indicate the sector has reached a maturity point, decelerating to 8.1% in 2017 after an impressive 22.9% growth in 2016.

Specialty Food & Liquor includes wine, tea, coffee and non-perishable groceries. Growth in this category has been flat, with a slight 0.4% lift last year following negative growth in 2016. Wine and liquor is the next growing trend to watch.



Year-on-year growth by category



Share of online purchases

Who's buying?

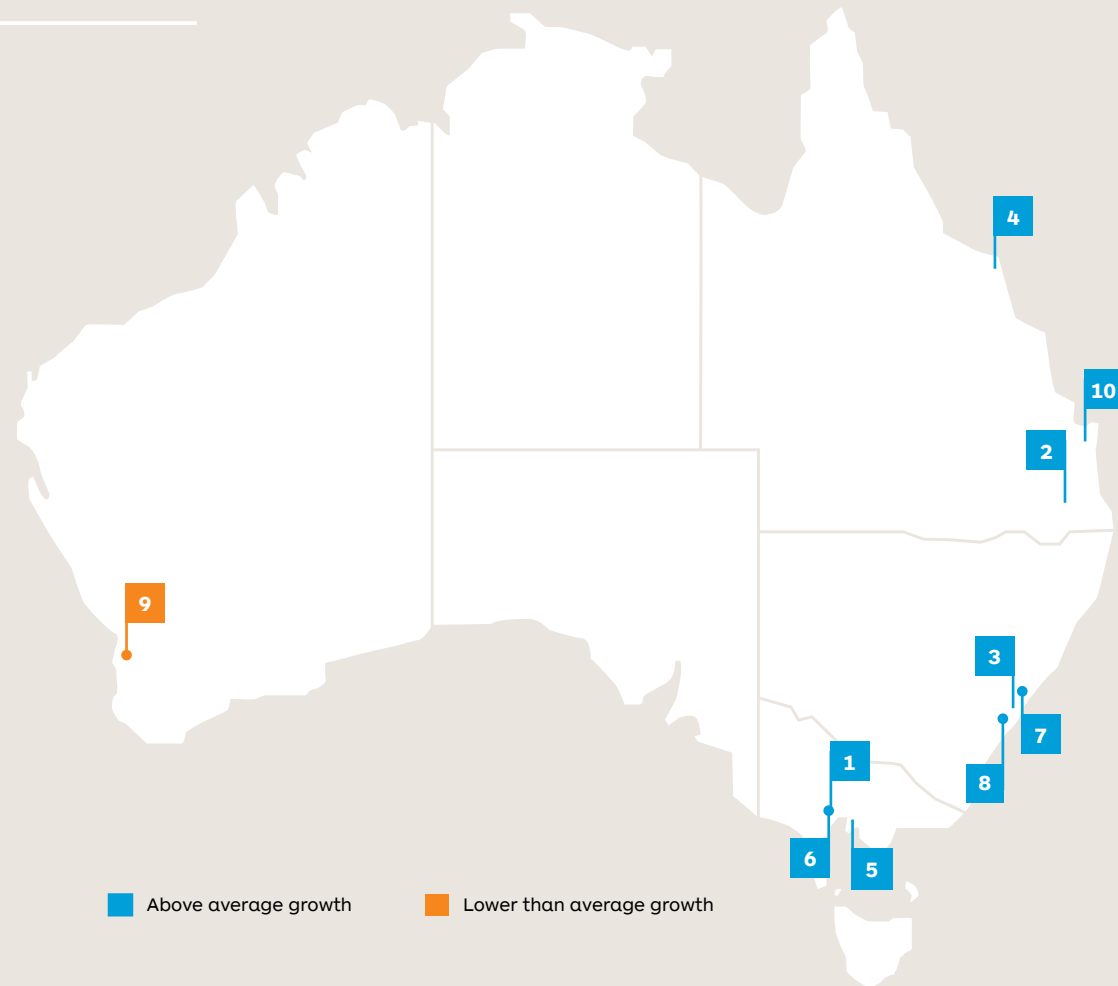
Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Point Cook, 3030	22.6
2	Toowoomba, 4350	19.5
3	Liverpool, 2170	21.1
4	Mackay, 4740	25.1
5	Cranbourne, 3977	27.3
6	Hoppers Crossing, 3029	31.7
7	Gosford, 2250	19.8
8	Campbelltown, 2560	25.7
9	Mandurah, 6210	17.2
10	Bundaberg, 4670	22.5

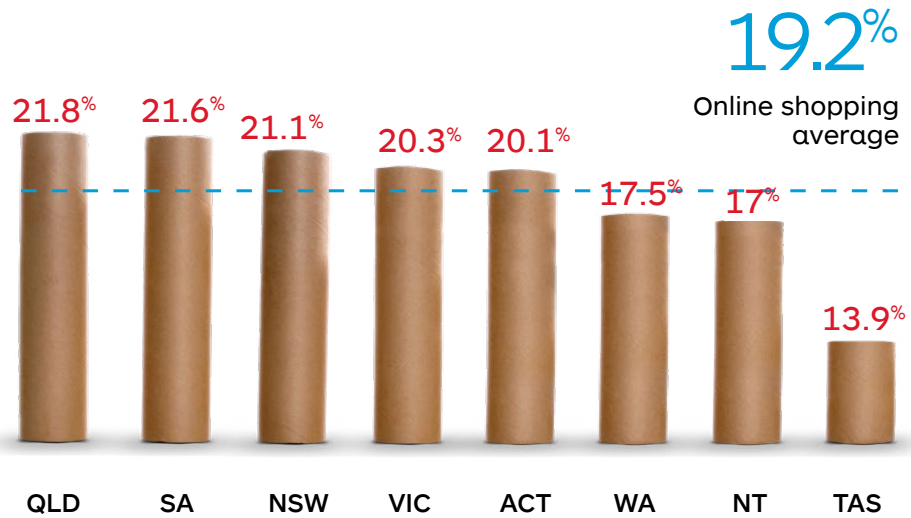
Point Cook in Melbourne's west was the number one online shopping suburb in Australia for the third year running. Boosted by the addition of over twenty-two thousand residents at the last census count, Point Cook continues to grow above the national average.

The top ten buying locations were dominated by suburbs which have seen an influx of young families. This continues to play out in Hoppers Crossing and Cranbourne in Victoria's growth corridors, both growing above 27% year-on-year.

By contrast, new entrant Bundaberg, Queensland has a different demographic; the median age is six years above the Australian average. Residents here are embracing online shopping, with purchases growing by 22.5% in 2017.



State and regional growth



Australia achieved solid online growth, with all states and territories attaining double digit growth. Western Australia and the territories were below the national average of 19.2%. The rest of the states grew by 20-22%.

Overall, metro growth was on par with regional areas. However, when we break the regional locations down further, inner regional areas came in above the average, growing just over 20% year-on-year.



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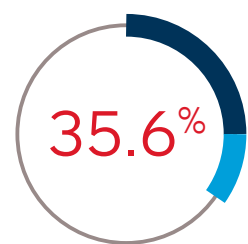


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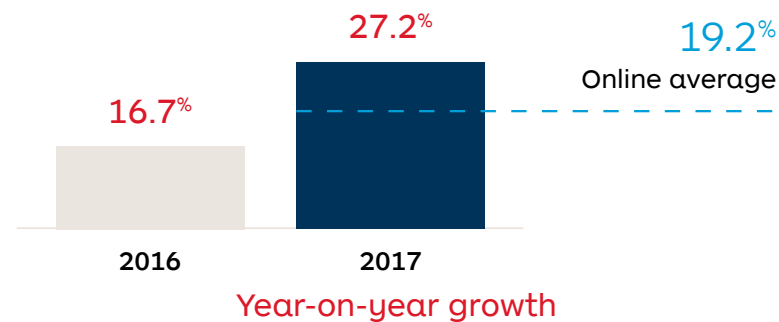
Fashion has become the powerhouse category of online shopping, achieving double-digit growth for the sixth consecutive year. Purchases from pure Fashion retailers represent 26.5% of all online orders. If we include fashion-related products from the Variety Stores category³, the overall category share increases to 35.6%.

The category grew 27.2% year-on-year, well above the 16.7% rate of 2016, and eight percentage points ahead of the overall online average.

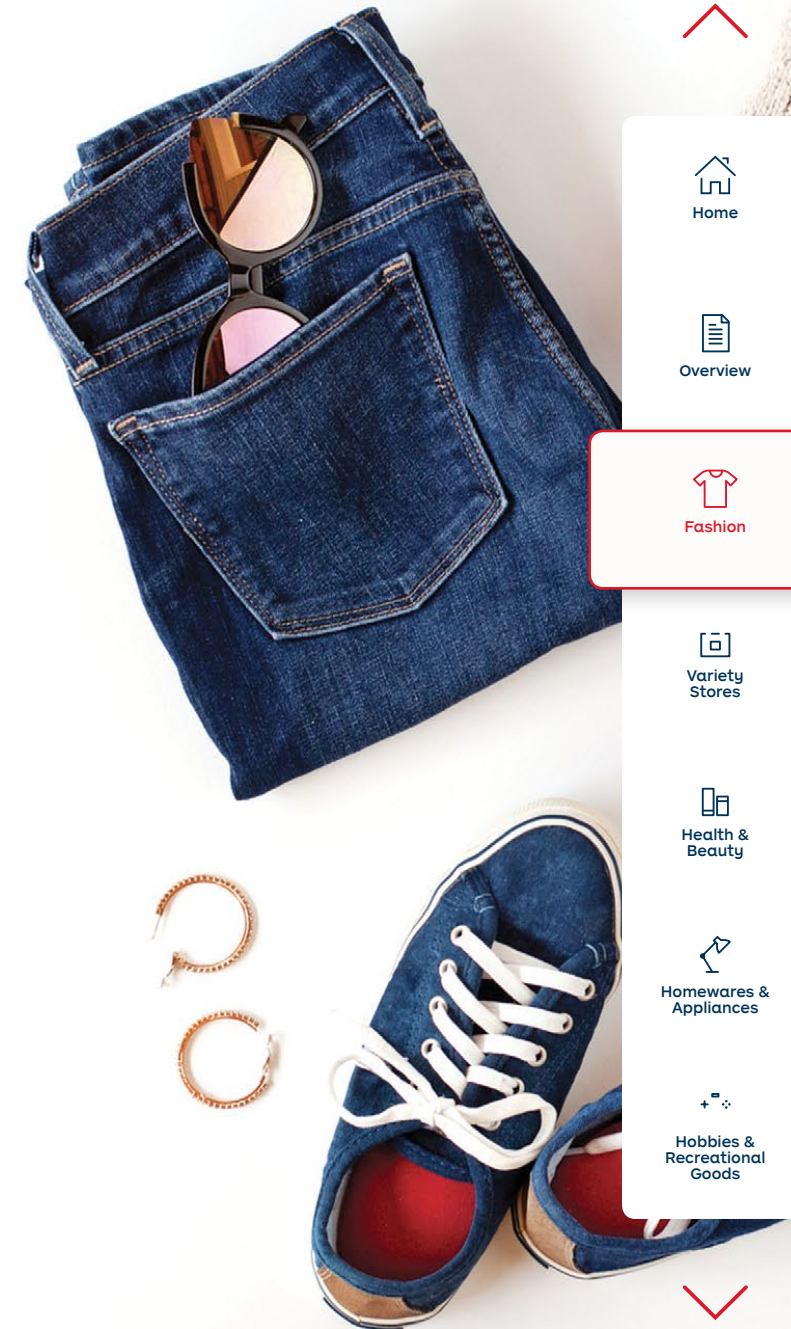
This is in stark contrast to traditional Fashion retail sales growth which, at 1.5%², failed to keep pace with population growth. It is a sign of how comfortable Australians have become with buying clothing online.



Share of online purchases



Year-on-year growth



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Hobbies & Recreational Goods

Digging deeper

Women's Fashion was the driving force in the category – growing 43.8% across the country, compared with 26% for Men's Fashion.

26%

Growth in Men's Fashion



43.8%

Growth in Women's Fashion

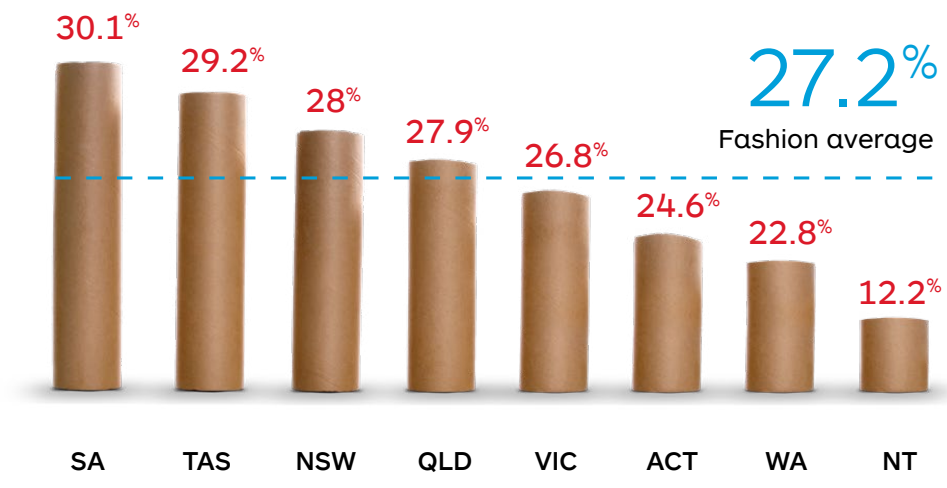


What else is growing in this category?



Growth in Footwear continued to rise in 2017 to a solid 22.7%, although this has eased compared to the impressive 32% the previous year. Similarly growth also tapered off in Activewear, landing at 11.7%.

State and regional growth



The gap between metro and regional online purchases has narrowed, with metro reaching 28.3% growth, just over four percentage points above the regional rate of 23.9%. And while all states and territories saw double-digit growth, South Australia and Tasmania led the way, with 30.1% and 29.2% growth respectively.



Monthly trends

The increasing popularity of sales events is creating a behavioural change, consistent with shoppers holding off waiting for a bargain.

For the first time, November was the biggest month of the year for Fashion purchases, outstripping December thanks to a huge 30.2% year-on-year growth rate. This was driven by four sales events, all relatively new to the Australian market: Black Friday, Cyber Monday, Click Frenzy and Singles Day.

August, meanwhile, moved ahead to become one of the biggest months outside of the Christmas period. Afterpay Day, launched by the fast-growing online payment option, was held in late August 2017. The company reported \$15 million in sales during the event, with more than 70,000 orders - 1.5 per second in the first hour alone⁷.



30.2%

November year-on-year growth in Fashion purchases

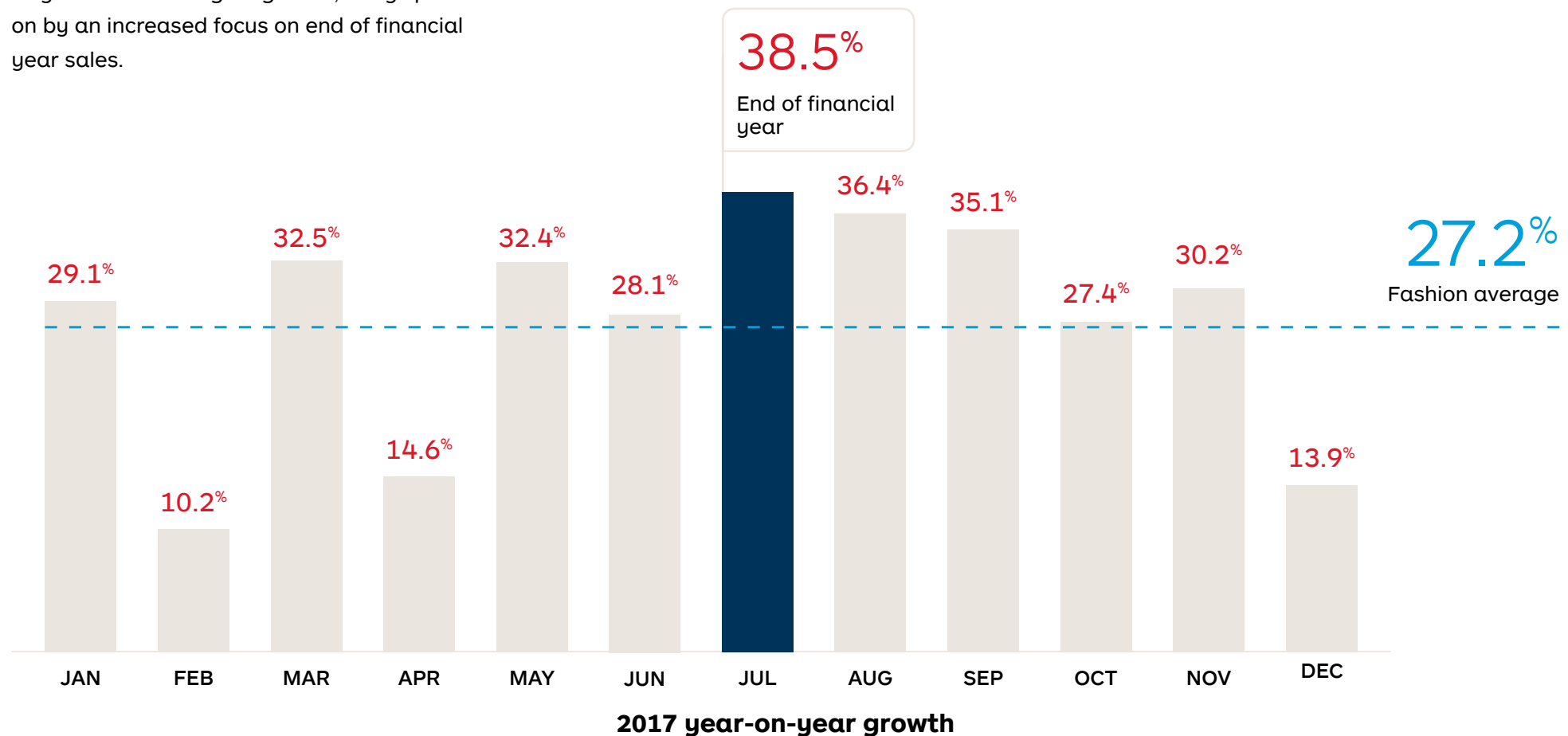




Online purchasing behaviour

There were much more pronounced peaks and troughs when looking at year-on-year growth in 2017.

July showed the largest growth, likely spurred on by an increased focus on end of financial year sales.



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Who's buying?

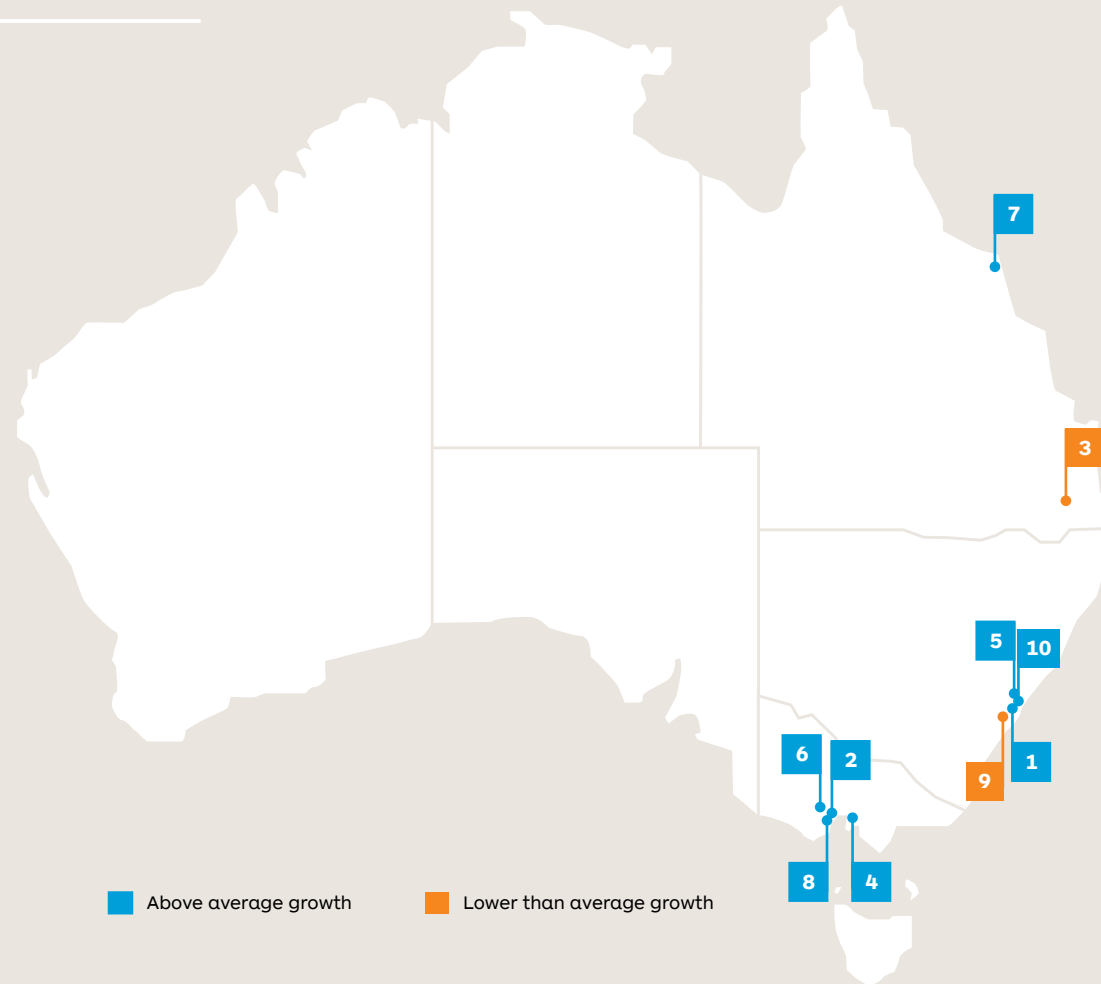
Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Liverpool, 2170	33.6
2	Point Cook, 3030	35.2
3	Toowoomba, 4350	21.6
4	Cranbourne, 3977	40.3
5	Rouse Hill, 2155	38.8
6	Ballarat, 3350	28.8
7	Mackay, 4740	30.1
8	Grovedale, 3216	36.4
9	Campbelltown, 2560	25.3
10	Wentworthville, 2145	29.2

Liverpool in NSW has retained the top position and is once again Australia's online Fashion capital. This is partly due to its sizeable population of over 105,000 people, an increase of 11% between the last two censuses.

Population growth has also driven many other suburbs up the rankings. In Victoria, both Point Cook and new entrant Cranbourne, added over 22,000 people each in the last census. Age was another strong influence on online fashion

shopping habits. All of the top three suburbs have a younger demographic with median ages at least four years younger than the national average.



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Location trends

Growth

North Adelaide showed strong growth, with the increased activity predominantly driven by budget conscious savvy online shoppers.



South Australia	
Top growth locations	Growth (%)
Davoren Park, 5113	87.7
Munno Para West, 5115	80.9
Evanston Park, 5116	57.1
Elizabeth East, 5112	54.7
Craigmore, 5114	54.5

Decline

Onslow and Carnarvon in WA were the only two suburbs that saw a year-on-year decline in Fashion purchases. Both have been hit by the downturn in the mining sector. Mining areas tend to be heavily reliant on online shopping (due to a lack of traditional retailers) so any downturn, and associated population or employment decline, tends to result in an associated drop in online sales.



Western Australia	
Declining locations	Decline (%)
Onslow, 6710	-12.6
Carnarvon, 6701	-3.6



What can we learn?

Buy now, pay later payment services are changing the game

Buy now, pay later (BNPL) payment services now make up 7.7% of total online spend on physical goods. Fashion alone represents 57% of all BNPL transactions, a seven-fold increase in 2017 from 2016¹. Not surprisingly, this payment option is attractive to young adults as it provides instant gratification. Expect to see this type of payment become even bigger in the coming year as the trend takes hold more broadly.

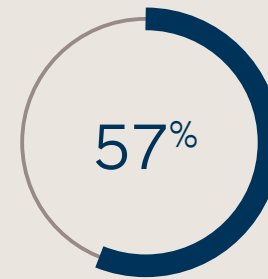
Shopping events are now part of the culture

The US sales event Black Friday emerged in Australia just a few years ago, but it is already having a huge impact. 16% of online shoppers participated in the 2017 Black Friday event³. Singles Day, a sales event from China, is also making big inroads here. These events are becoming a significant part of the shopping landscape.



16%

of online shoppers purchased during Black Friday sales



of all BNPL purchases were fashion related



2016

2017

Seven-fold increase in BNPL usage



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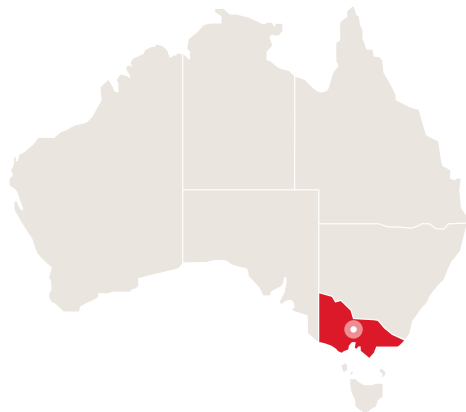


Marketplaces will continue to expand:

Until recently, eBay was the only significant online marketplace for Fashion shoppers in Australia. With retailers like Catch and Myer setting up their own marketplaces, and Amazon's arrival in late 2017, we see marketplaces playing an even bigger role in the future.

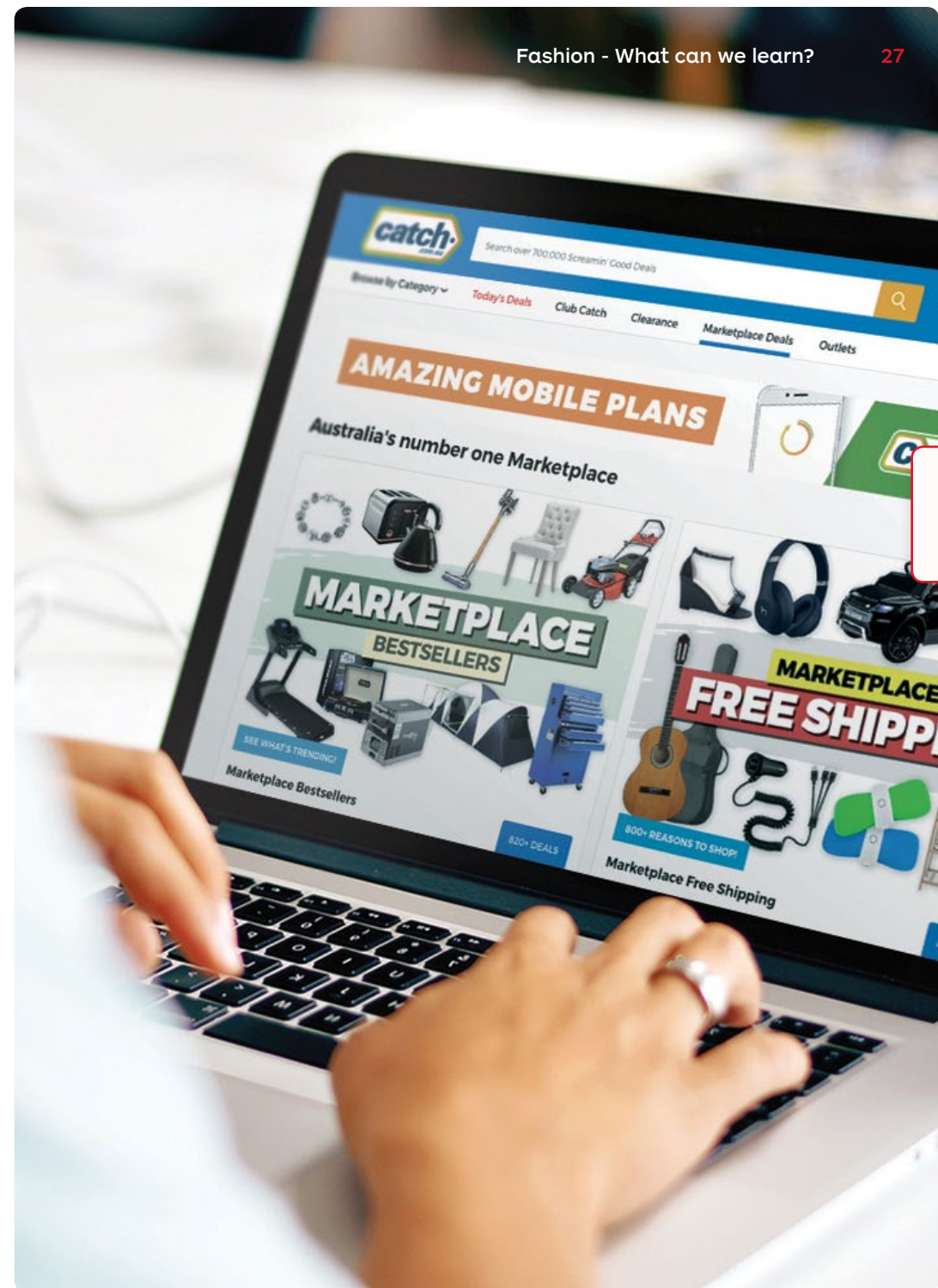
Melbourne's outer west is our tip for future growth:

Our hot picks for 2017, Wellard and Byford in WA, lived up to expectations, growing by 54.7% and 42.2% respectively in 2017. This year, suburbs like Rockbank (3335), Melton South (3338) and Melton West (3337) on Melbourne's urban growth boundary are the ones to watch. With median ages well below the national average and populations set to grow, we predict that these suburbs will be up towards the top of next year's growth list.



Our hot picks for 2018

- Rockbank, 3335
- Melton South, 3338
- Melton West, 3337



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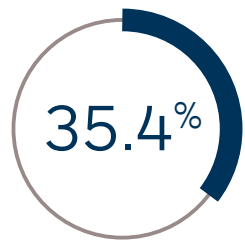
Overview

Variety Stores is the biggest category in online shopping, accounting for over one third (35.4%) of all purchases in Australia in 2017.

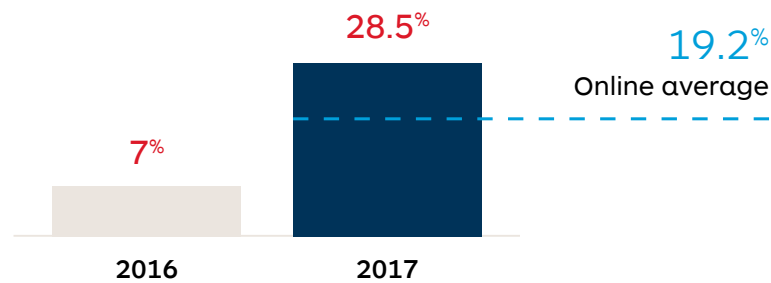
This category comprises of retailers that sell a wide range of goods, from clothing and beauty products to books and electronics.

Around one quarter (25.6%) of variety store purchases are fashion-related, and a further 20% are consumer electronics³. The majority of purchases in this category come from pure play online retailers (70%).

Growth in variety store purchases over the year was 28.5%, above the overall growth rate of 19.2%, and well ahead of the 7% rate for the category in 2016.



Share of online purchases



Year-on-year growth



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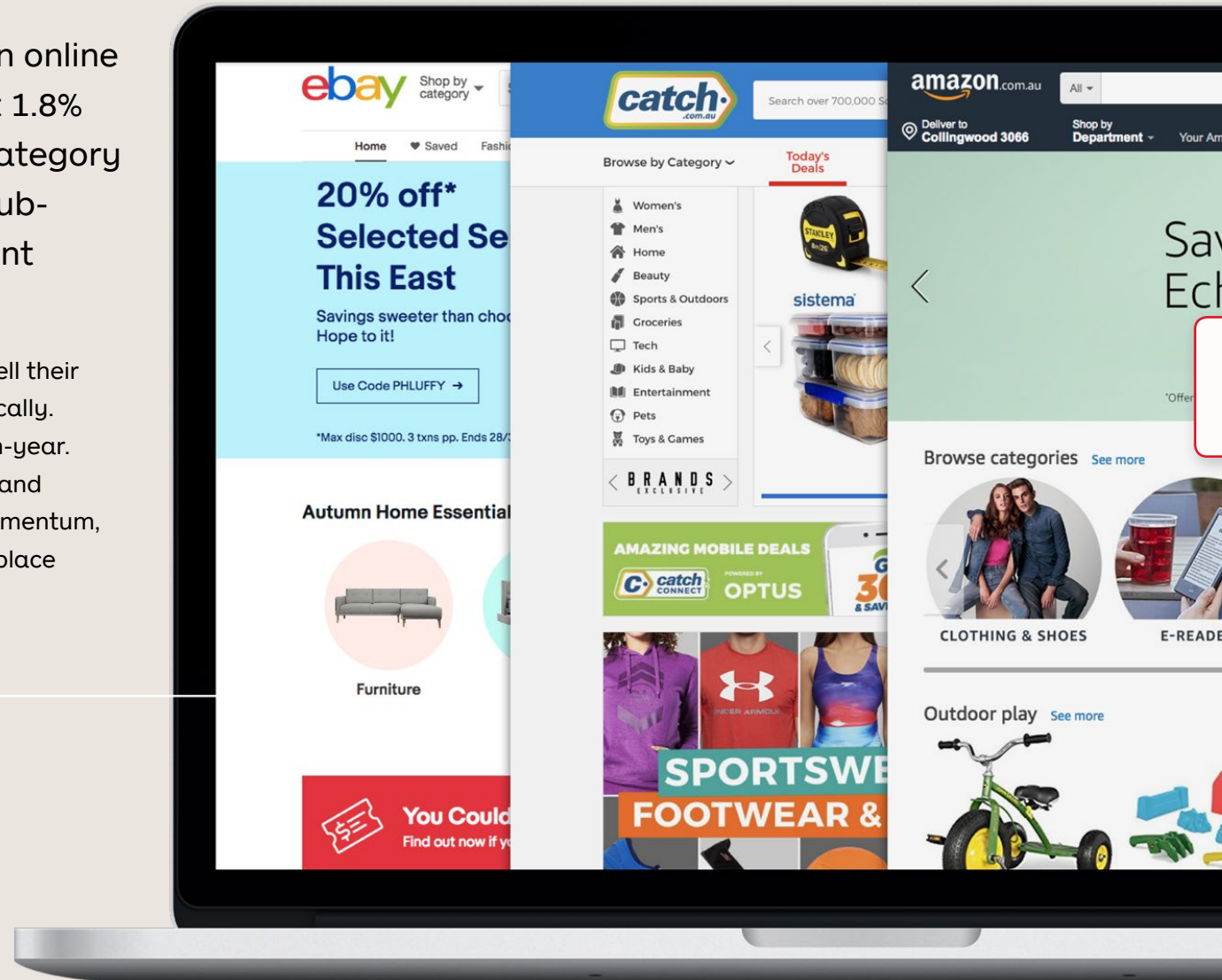


Digging deeper

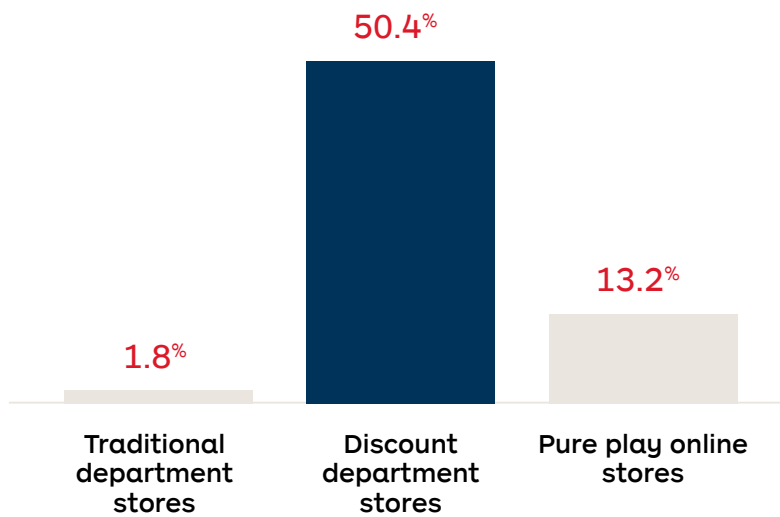
Traditional department stores with an online presence had modest growth, up just 1.8% year-on-year. Overall growth in the category however was driven by two distinct sub-categories: marketplaces and discount department stores.

Marketplaces, websites that allow third parties to sell their products direct to consumers, have surged dramatically. Purchases from these platforms grew 74.8% year-on-year. Once almost solely the domain of players like eBay and Amazon, the concept of marketplaces is gaining momentum, with Catch and more recently Myer offering marketplace functions on their websites.

74.8%
growth in purchases from
marketplace platforms

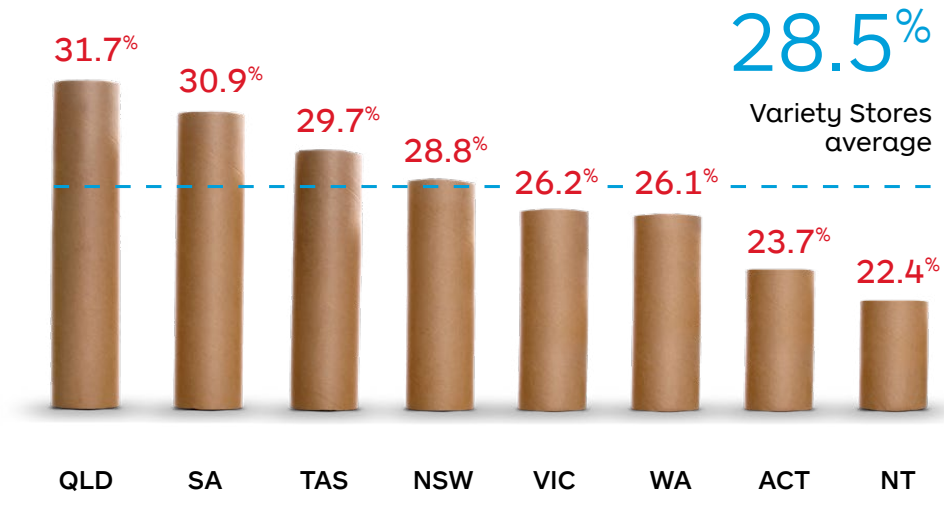


2017 sub-category growth



The growth of discount department stores was the second contributor to the overall category performance. Retailers that were once primarily concerned with traditional sales channels are becoming bigger players in the online world, and consumers are responding. Discount department stores were up 50.4% on last year.

State by state growth



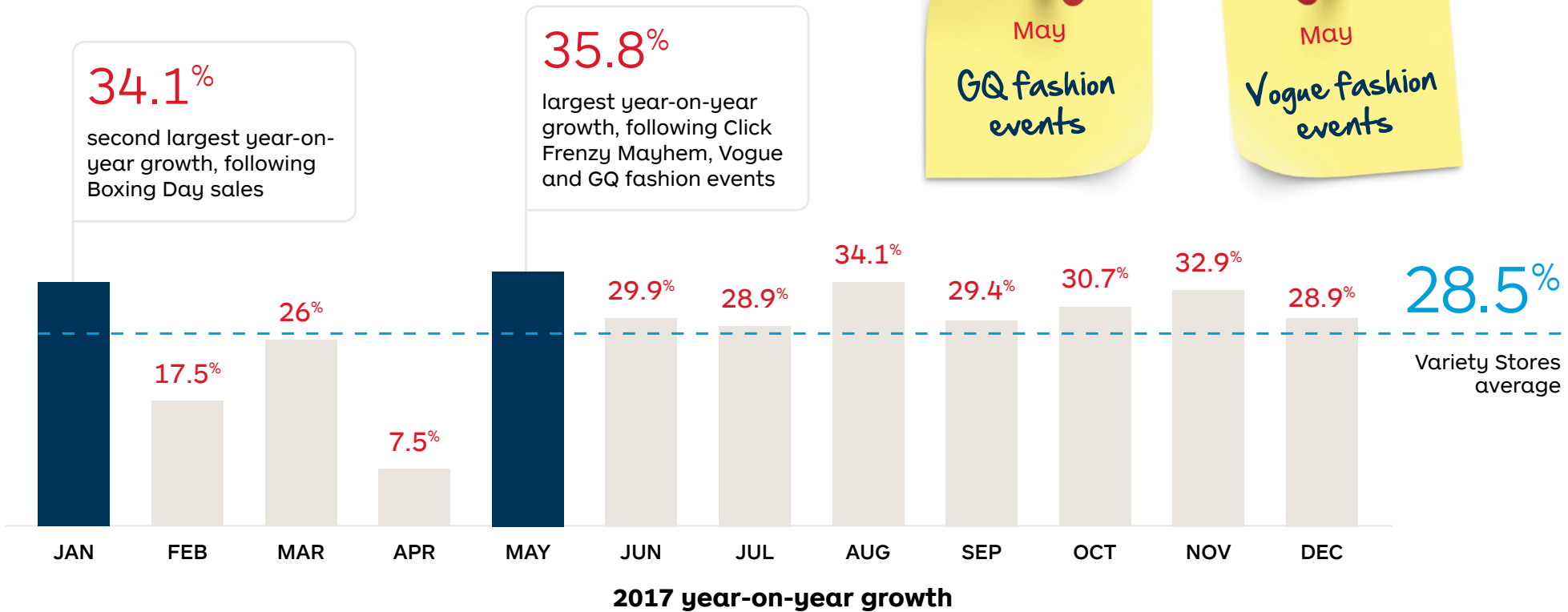
Regional Australia led the growth for the category, up 31.2% compared with 27.3% in metro areas. Online Variety Stores are particularly important in regional and remote areas where it can be more difficult to source hard-to-find items.

Growth was fairly evenly spread, with all states growing more than 20%. Queensland led the way with 31.7% growth, while NT saw the slowest growth, up 22.4% year-on-year.



Monthly trends

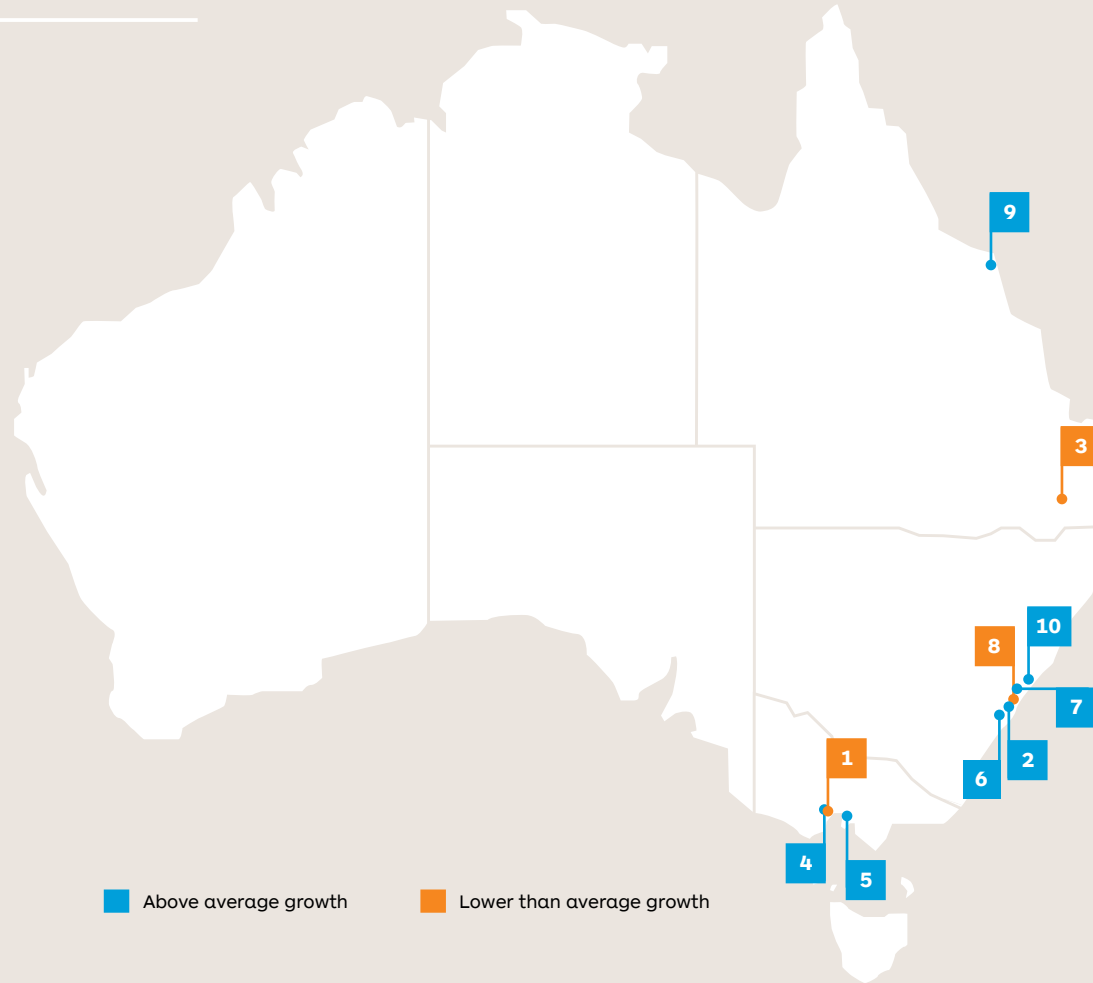
May achieved the largest year-on-year growth fuelled by online shopping events. This was followed closely by January. Boxing Day sales remain a favourite for shoppers who prefer the convenience of shopping online to avoid busy checkouts.



Who's buying?

Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Point Cook, 3030	27.4
2	Liverpool, 2170	28.6
3	Toowoomba, 4350	25.8
4	Hoppers Crossing, 3029	33.7
5	Cranbourne, 3977	34.6
6	Campbelltown, 2560	34.0
7	Gosford, 2250	29.5
8	Wentworthville, 2145	22.2
9	Mackay, 4740	37.4
10	Wyong, 2259	36.5



Point Cook and Liverpool maintained the top position in the Variety Stores category, thanks largely to their sizeable populations, each over 100,000.

Mackay and Wyong were new entrants into the top ten, with strong growth rates of 37.4% and 36.5% respectively. Notably, Wyong, on NSW's Central Coast, does not display the typical characteristics of high online purchasing

locations. It has a relatively small population, a median age above the national average and a median household income below the national average.



Location trends

Growth

Three locations in the Mackay region of Queensland experienced the best growth for Variety Stores. This was driven by strong growth in marketplace and discount department store purchases.



Queensland	
Top growth locations	Growth (%)
Marian, 4753	38.4
Bucasia, 4750	34.6
Walkerston, 4751	38.3

Slow Growth

The lowest growth suburbs in the Variety Stores category were Kew East, Elsternwick and Toorak in Melbourne. The growth rates, while healthy, were less than half the national average. All three suburbs have median incomes well above the national average, suggesting they may not have been as affected by this year's trend towards discount buying.



Victoria	
Slow growing locations	Growth (%)
Kew East, 3102	13.3
Elsternwick, 3185	13.9
Toorak, 3142	14.8



What can we learn?

Competitive landscape and expanding product range

Online retailers that were once focused on a particular product or category are expanding to offer a broader range. Catch, for example, originally offered just one product per day but now offer over 100,000 products. While well-known players such as Amazon and eBay continue to expand their offerings, traditional retailers are placing more of their product range online. This has created increased visibility of their products and has compelled retailers to be more price competitive.

Discount department stores are now part of the online landscape

Three years ago, discount retailers had very little presence online. After a 50.4% surge over the past twelve months, they have finally become an integral part of online shopping.

North-west Hobart is our tip for future growth

Our picks for 2017, Clyde North and Officer in Victoria lived up to the hype, growing by 67.2% and 62.6% respectively. This year our tips for future growth are the Hobart suburbs of Claremont and Glenorchy. Both have had strong growth of over 40% last year, and we expect the trend to continue.

Our hot picks for 2018

- Claremont, 7011
- Glenorchy, 7010



50.4%

increase in online purchases from discount department stores



Industry overview

Health & Beauty



Home



Overview



Fashion



Variety Stores



Health & Beauty



Homewares & Appliances



Hobbies & Recreational Goods



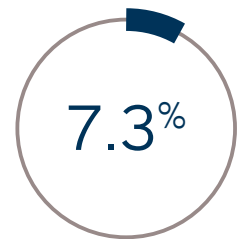
Overview

Health & Beauty has shown double digit growth for the past three years. In 2017, it saw a solid 13.2% growth, a slight easing compared to a 15.5% increase in 2016. The two categories have grown at different rates and have two distinct audiences.

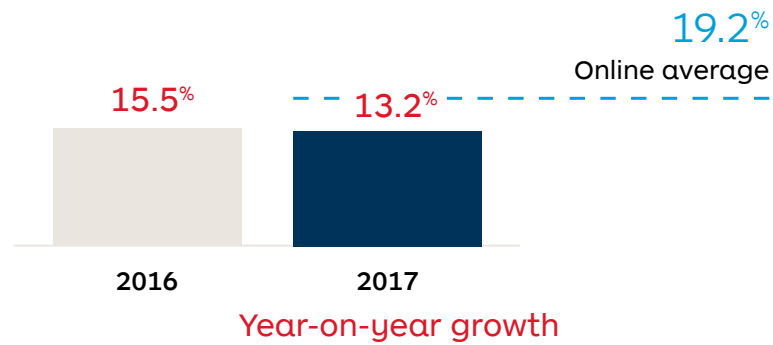
Health is dominated by purchases of vitamins, supplements and pharmaceutical goods, and is over represented in the 40 and over age bracket. It is the seventh most popular category bought online³, however growth has eased, resulting in a slowdown in the overall Health & Beauty category.

By contrast, Beauty consists mainly of cosmetic products and is popular with the 18-39 demographic. Beauty and cosmetics purchases are the fourth most popular item bought online³ and experienced strong growth up 29.4%.

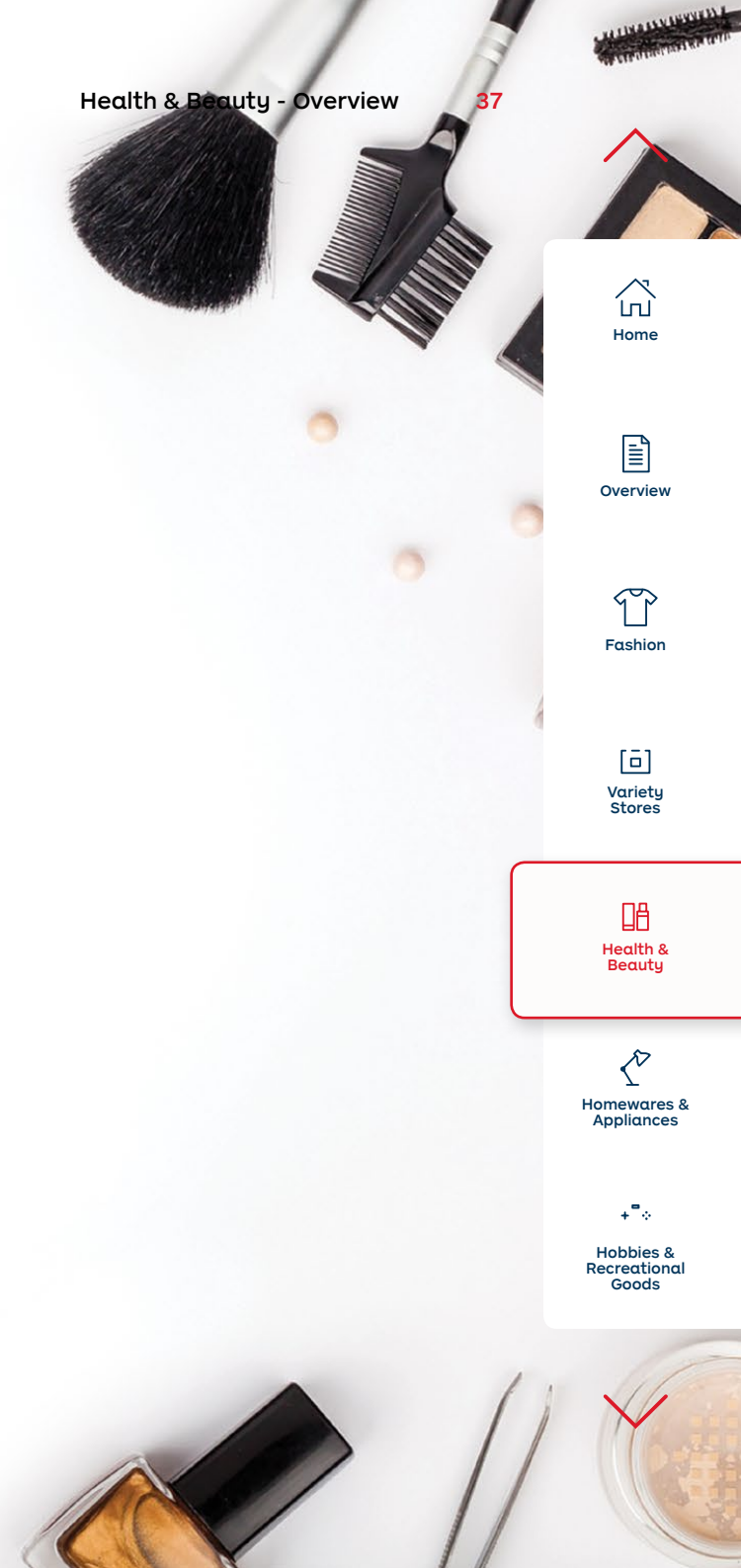
Overall, the Health & Beauty category was six percentage points below the online growth average of 19.2%.



Share of online purchases



- Home
- Overview
- Fashion
- Variety Stores
- Health & Beauty
- Homewares & Appliances
- Hobbies & Recreational Goods



Digging deeper

It was a stellar year for beauty and cosmetics purchases, up 29.4% compared to 2016, and ten percentage points above the overall online average.

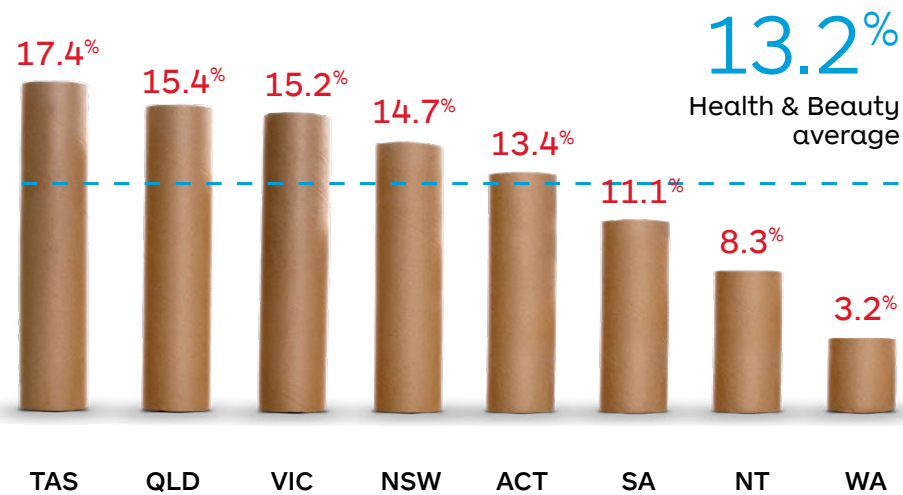
Health & Pharmacy, by contrast, grew a modest 5.8% year-on-year.

29.4%
Growth in Beauty & Cosmetics

5.8%
Growth in Health & Pharmacy



State and regional growth



There was not much separating metro and regional growth in the category - 13.3% and 12.9% growth respectively. But across the states, the story was more varied. Tasmania (17.4% growth) and Queensland (15.4%) performed the best, driven by demand in the Health & Pharmacy sub-category. Western Australia was well behind the other states, growing by just 3.2%.

Monthly trends



Year-on-year growth

March saw the biggest year-on-year growth at 29.1%, fuelled by online beauty sales. This was followed closely by post-Christmas sales, an increase of 20.8% in January.

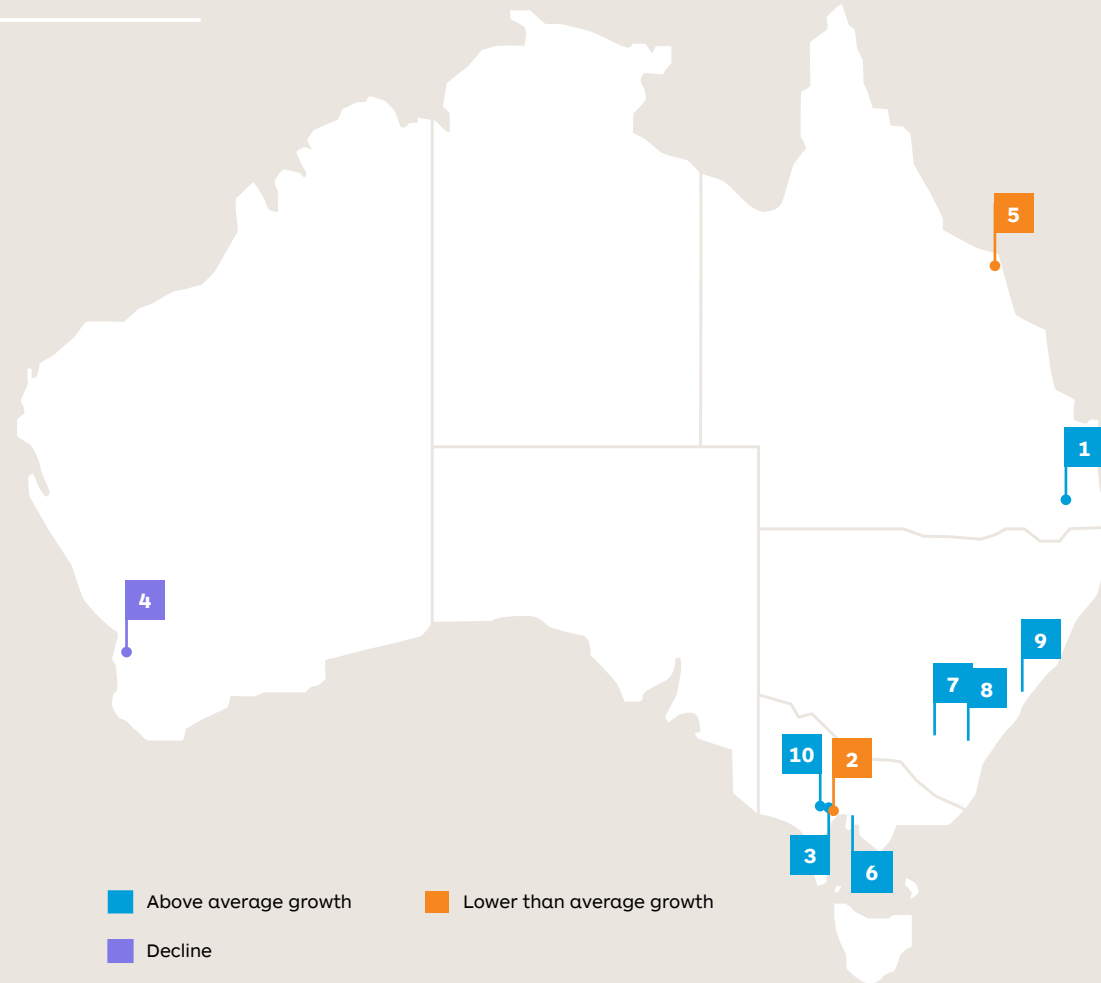
May came in third at 16.1% growth, traditionally a strong sales period due to Mother's Day. We expect online purchases to continue to grow both through direct purchasing and gifting.



Who's buying?

Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Toowoomba, 4350	17
2	Point Cook, 3030	7.4
3	Hoppers Crossing, 3029	15
4	Mandurah, 6210	-0.6
5	Mackay, 4740	8.3
6	Cranbourne, 3977	26.3
7	Wagga Wagga, 2650	14.7
8	Belconnen, 2617	33
9	Gosford, 2250	15.8
10	Ballarat, 3350	16.4



The Queensland town of Toowoomba just edged Point Cook in Victoria out of the top position for health and beauty purchases. Both have large populations of over 100,000.

Belconnen in ACT, performed the best on a per capita basis, growing over 2.5 times faster than the category average. At half the size of most other postcodes on the top ten list, it still managed to reach 8th spot. The suburb has a

low median age (six years below the national average) and household incomes 33% above the Australian average. Young people, coupled with higher incomes tend to shop more online.



Location trends

Growth

On the Mornington Peninsula in Victoria, the seaside towns of Dromana, Rosebud and Mornington all saw high growth in online health and beauty purchases. This is fuelled by growing populations and a lack of extensive shopping options nearby.



Victoria

Top growth locations	Growth (%)
Dromana, 3936	41.7
Rosebud, 3939	28.9
Mornington, 3931	26.7

Decline

With plenty of traditional shopping options nearby, residents of Nollamara, Morley and Dianella located in Perth's inner metro held back on shopping online. All three areas experienced small year-on-year declines.



Western Australia

Declining locations	Decline (%)
Nollamara, 6061	-4.2
Morley, 6062	-3.8
Dianella, 6059	-1.2



What can we learn?

Buy now, pay later payment services are making waves

Over \$125 million beauty and cosmetic sales were made through a buy now, pay later (BNPL) service¹. This is a seven-fold increase from 2016. Beauty and cosmetic purchases now make up one in ten of all BNPL transactions and we expect the trend to continue.

Beauty meets Fashion

Beauty and Fashion shoppers primarily comprise of young females with similar payment preferences. Fast-fashion retailers are responding to the similarities. Many sites that once sold clothes exclusively are now extending their lines to include beauty products.



1 in 10
of all BNPL purchases
are related to Beauty

\$125 million

estimated spend on
beauty and cosmetics
via BNPL



Seven-fold increase in BNPL usage



Online shoppers are becoming more savvy

Finding the best value for any item takes a little perseverance and a few simple clicks. With easy access to retailers online and the awareness of alternate brands ever increasing, shoppers are identifying equivalent products at a lower cost. The average order value in 2017 was \$80, a 4.3% decline from the previous year³.

Consumers are buying more frequently

Not only are consumers being savvier when shopping online, they are doing it more frequently. On a monthly basis, 22% of females made a beauty or cosmetic related purchase in 2017. This is a 2.2% increase over the previous year³.

Wollongong is our tip for future growth

Alkimos and Yanchep in WA were our hot picks last year, each growing 32.4% and 4.4% respectively in 2017. Whilst growth in Yanchep has been modest, the suburb is going through a development phase with more potential still to be realised.

Located in the Illawarra region, Dapto and Wollongong are experiencing strong growth at 29.7% and 19.9% respectively. Wollongong Central has a new retail precinct with various pop-up leasing options. Expect online demand to continue for health and beauty purchases as shoppers are exposed to more brands. This will lead to consumers looking for better value and the convenience of shopping online.



Our hot picks for 2018

- **Dapto**, 2530
- **Wollongong**, 2500



Industry overview

Homewares & Appliances



Home



Overview



Fashion



Variety Stores



Health & Beauty



Homewares & Appliances



Hobbies & Recreational Goods



Overview

Homewares & Appliances had solid growth in 2017, up 10.9%, this followed a more reserved 6.9% increase the year before. The overall category performance is more than eight percentage points below the online growth average of 19.2%.

This is not a sign of falling interest in the products themselves, but rather a shift in where consumers buy them. As more retailers are expanding their product lines to play in this space, one in four items bought from the Variety Stores category relate to homewares and appliances³.

The trend is most pronounced in the Consumer Electronics, Small Appliances and Computer Hardware sub-categories, as shoppers look for the best value in Variety Stores.

Overall spending is up, with the average order value for Homewares up 7.4% and Consumer Electronics by a more modest 1.2%³.



Share of online purchases



Homewares & Appliances



Hobbies & Recreational Goods

Digging deeper

It was a stand-out year for homewares purchases, with strong growth at 21.3% in 2017, an almost ten percentage point increase from the previous year.

Consumer Electronics, by contrast, had a modest 6.6% growth. This is a strong performance compared to 3.8% the year before.



6.6%

Growth in Consumer Electronics

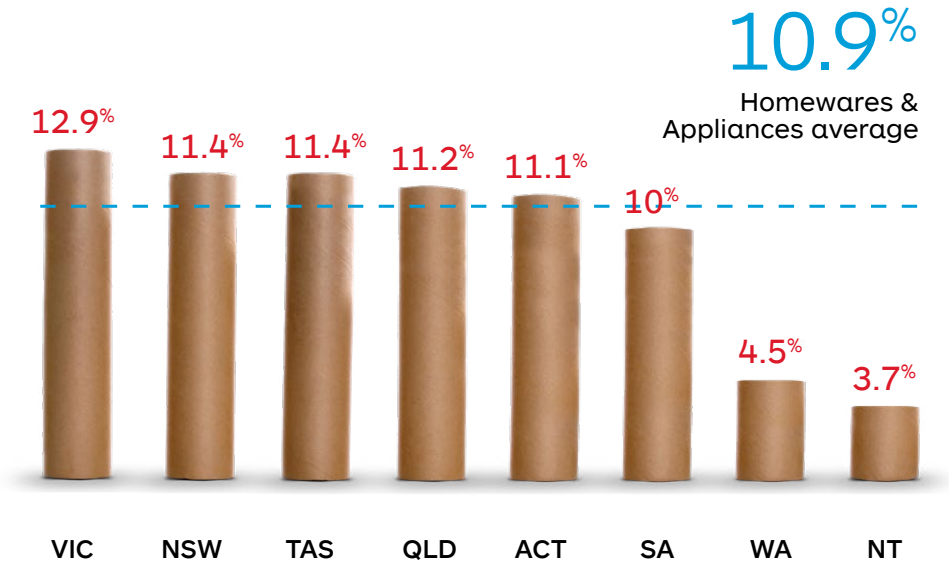
21.3%

Growth in Homewares





State and regional growth



Metro areas outgrew regional locations by just under two percentage points, at 11.4% compared with 9.6%. All the eastern states, including ACT, performed above the category average, with Victoria leading the way at 12.9%. The notable exceptions were Western Australia, up just 4.5%, and Northern Territory, at 3.7%.

Monthly trends



The change in seasons in March coincided with the largest year-on-year growth at 20.2%. Growth was predominately driven by demand for homewares and consumer electronic items.

Not surprisingly, November came second, achieving 17% growth, stimulated by the number of online sale events.

It is also worth noting there was an increased demand for homewares during the winter months (June to August), up 22.4% year-on-year.



Homewares & Appliances



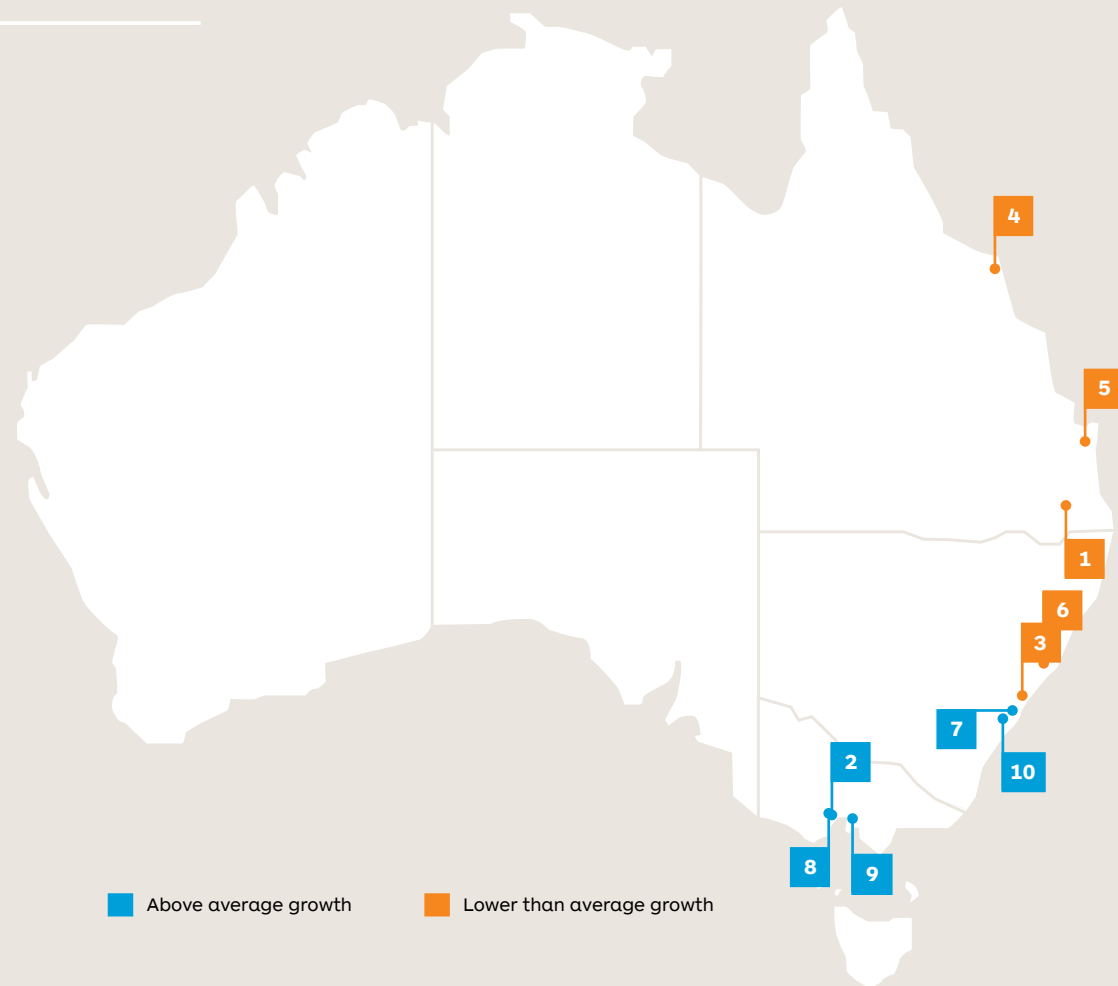
Hobbies & Recreational Goods



Who's buying?

Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Toowoomba, 4350	10.7
2	Point Cook, 3030	12.4
3	Gosford, 2250	7.2
4	Mackay, 4740	9.1
5	Bundaberg, 4670	9.3
6	Wyong, 2259	5.7
7	Liverpool, 2170	12
8	Hoppers Crossing, 3029	13.4
9	Cranbourne, 3977	18.2
10	Campbelltown, 2560	11.7



Residents in the regional towns of Toowoomba, Gosford, Mackay and Bundaberg were amongst the biggest online purchasers of Homewares & Appliances in 2017. The limited shopping

options continue to drive online demand. The biggest growth, however, came from Point Cook, Hoppers Crossing and Cranbourne – all suburbs in greater Melbourne's growth corridor.

With thousands of new residents moving into these suburbs each year to set up new homes, there has been strong demand for Homewares & Appliances.



Location trends

Growth

The suburbs in and around Ipswich, in Brisbane's west, have one of the highest category growth rates. Over 40% of the purchases relate to homewares with year-on-year growth exceeding 38%. The high proportion of family households, seven percentage points above the national average is helping to stimulate online demand.



Queensland

Top growth locations	Growth (%)
Springfield Lakes, 4300	23.1
Bundamba, 4304	22.5
Redbank Plains, 4301	22.5

Slow growth

The suburbs of Maylands and Inglewood in Perth were amongst the lowest growing areas in the category. Western Australia in general saw much lower growth than the rest of the country.



Western Australia

Slow growing locations	Growth (%)
Maylands, 6051	1.2
Inglewood, 6052	1.4



Homewares & Appliances



Hobbies & Recreational Goods



What can we learn?

Competitive landscape and expanding product range

Online retailers that were once focused on a particular product or category are expanding their range to include homewares and appliances. A wider range is sold through Variety Stores and due to their buying power, they can often offer more competitive prices than dedicated retailers. Over 25% of items bought from Variety Stores now relate to homewares and appliances³.

Dedicated Homewares retailers still have an edge

Unlike appliances or electronics, which tend to be less emotive purchases, Homeware shoppers often benefit from an in-store experience where they can see and touch the product. Retailers that create a seamless omni-channel experience are faring well. The growth in homeware purchases was up 21.3%, a solid two percentage points above the overall online average.

People are spending more on Homewares

The average order value on homewares was \$95, up 7.4% on the year before. That is well above the CPI rate of 1.9%. Shoppers from the 30-39 age demographic were the strongest purchasers, with an increase of 23% in 2017³.

\$95
Average basket value for
Homewares purchases

7.4%
increase in average
basket value for
Homewares



People are spending less on Consumer Electronics

There is continued interest for electronic products online, as reflected in the 6.6% growth. On a monthly basis, men purchased three times more than women on consumer electronics in 2017.

The increased availability of a wide-range of products at a competitive price has benefited consumers. The average spend on consumer electronics increased by just 1.2% to \$142, less than CPI in the same period³.

Outer Newcastle is our pick for future growth

Our hot picks last year in the Greater Geelong area have lived up to expectations, with Mount Duneed and Barwon Heads each growing over 30%, and Ocean Grove by 19.8% in 2017.

This year, we predict future growth in the western Newcastle areas of Wallsend and Cardiff. Both the suburbs have the attributes for potential growth including a growing population and a high proportion of family households (over three percentage points above the national average).

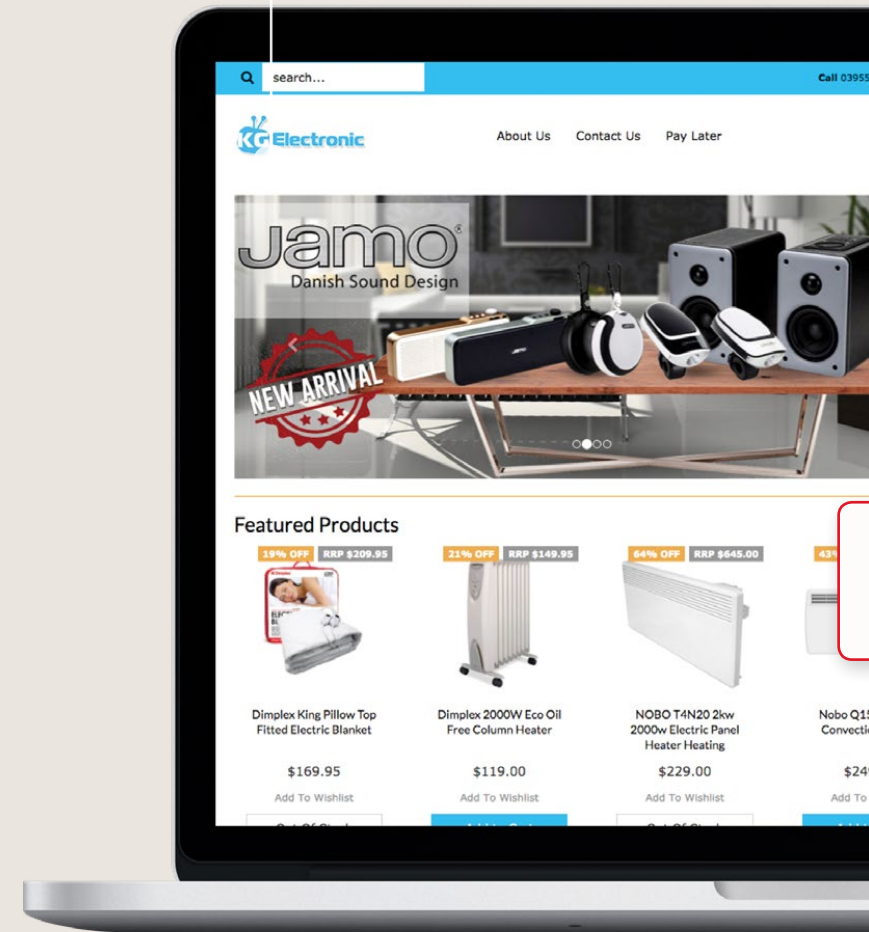


Our hot picks for 2018

- Wallsend, 2287
- Cardiff, 2285

1.2%

increase in average
basket value for
Consumer Electronics



Home



Overview



Fashion



Variety Stores



Health & Beauty



Homewares & Appliances



Hobbies & Recreational Goods



Industry overview

Hobbies & Recreational Goods



Home



Overview



Fashion



Variety
Stores



Health &
Beauty



Homewares &
Appliances



Hobbies &
Recreational
Goods

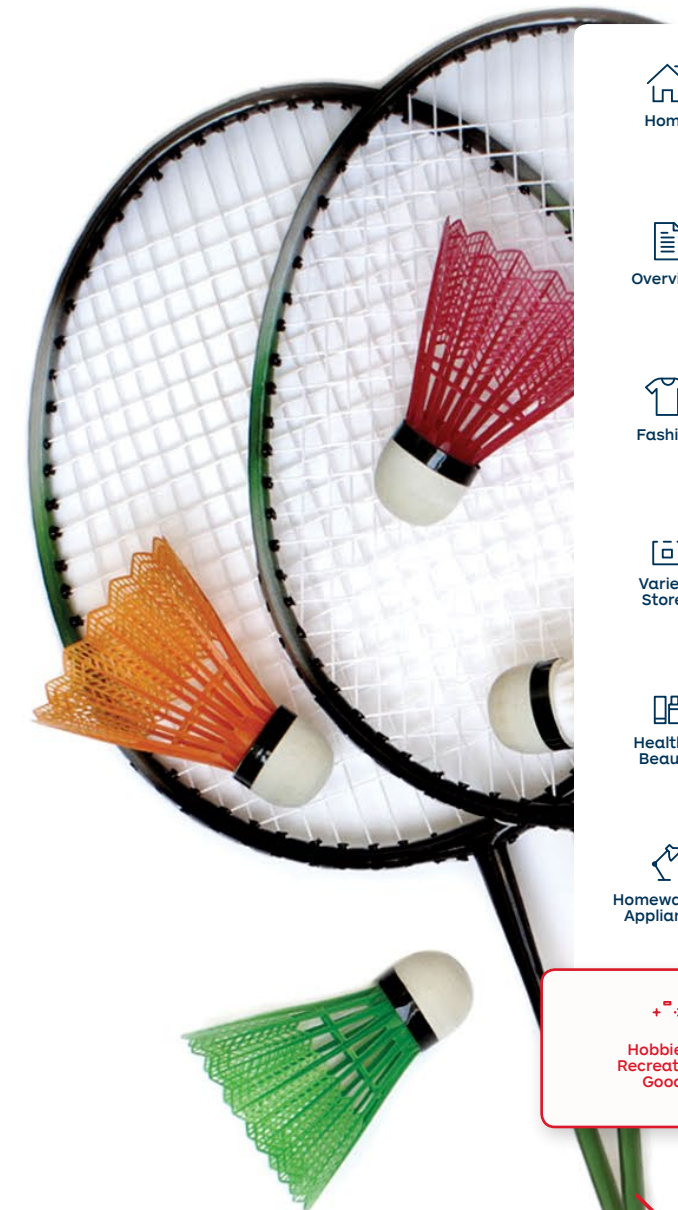
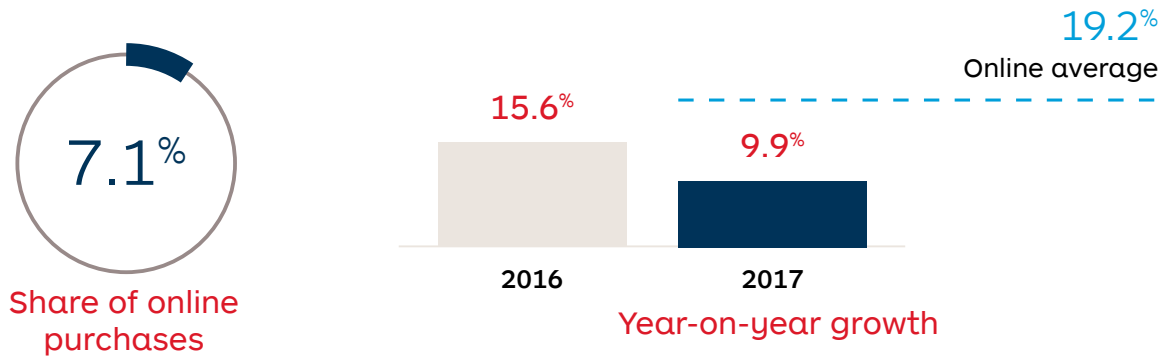


Overview

Hobbies & Recreational Goods is a diverse category, covering a broad product mix including Games & Toys, Outdoor goods, Sporting, Automotive and Music equipment. The first two groups make up more than half the purchases.

Overall, category performance was modest at 9.9% growth in 2017 compared to 15.6% in 2016, and nine percentage points below the online average.

Even with the broad range of products contained in this category, it only represents 7.1% share of all online purchases. This is a small representation by comparison, which signifies the category is yet to mature and has the potential to be disrupted by online retailers.



Digging deeper

It has been another stand-out year for musical instruments and accessories, as purchases grew 2.4 times faster than the main category growth.

Games & Toys also had an impressive year at 19.2% growth, almost twice the rate of Hobbies & Recreational Goods, and on par with the overall online average.



19.2%

Growth in
Games & Toys



24.2%

Growth in
Music



Home



Overview



Fashion



Variety
Stores



Health &
Beauty



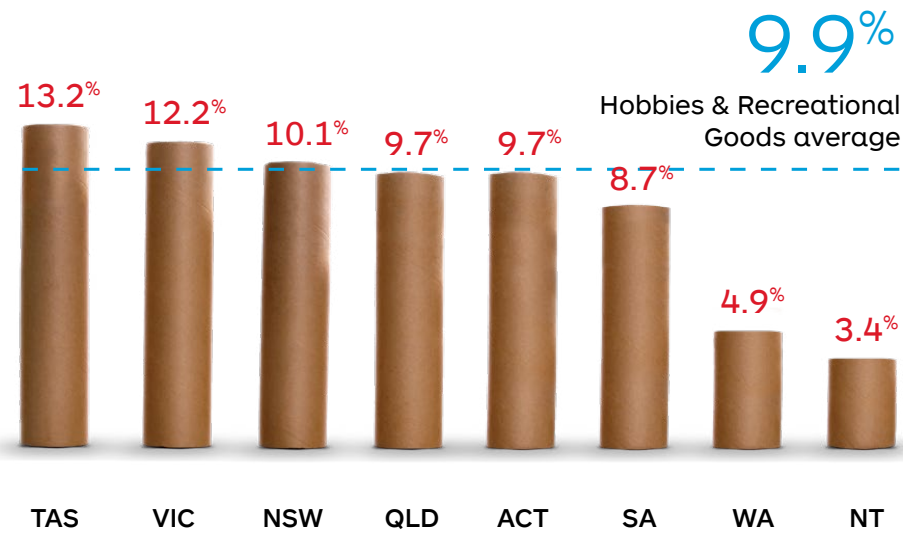
Homewares &
Appliances



Hobbies &
Recreational
Goods

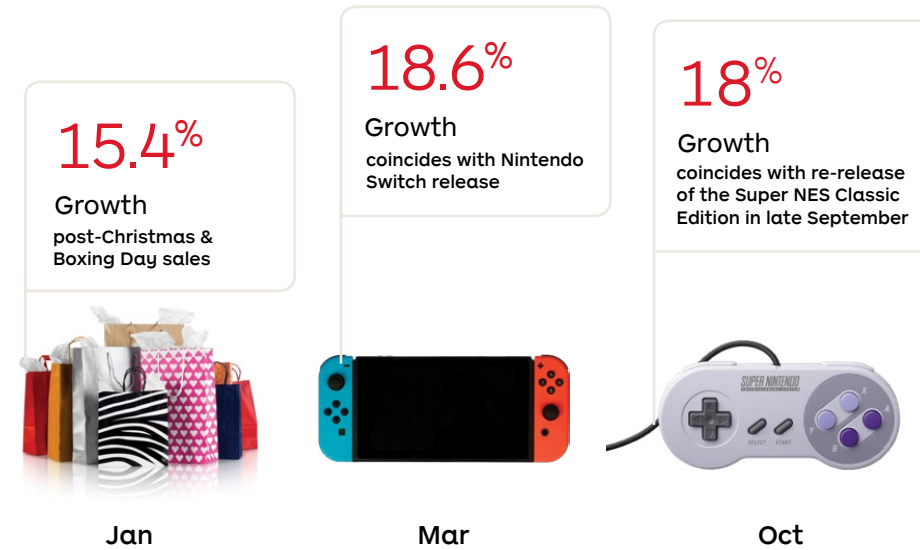


State and regional growth



Metro areas slightly outgrew regional locations, at 10.4% compared with 9%. By state, the result was more varied with three states coming in above the category average. Tasmania led the way at 13.2% growth which was largely driven by demand for Games & Toys and Music, each recording over 25% increases. Victoria followed next, recording growth above 20% in the same sub-categories and also showing strong demand for outdoor items (14.3%). New South Wales came in third place, just above the category average at 10.1%.

Monthly trends



As expected, December was the biggest month for the category with Games & Toys the top volume contributor. Although, the year-on-year growth for December was a modest 6.2%, the months leading up to the Christmas period reported strong growth of 18% in October and 13% in November.

There were two months with distinct growth spikes, March was the highest at 18.6% with October following closely behind. The peak months coincided with gaming releases, the Nintendo Switch in March and the re-release of the Super NES Classic Edition in late September.

January came in third, as more shoppers look online for post-Christmas and Boxing Day sales.



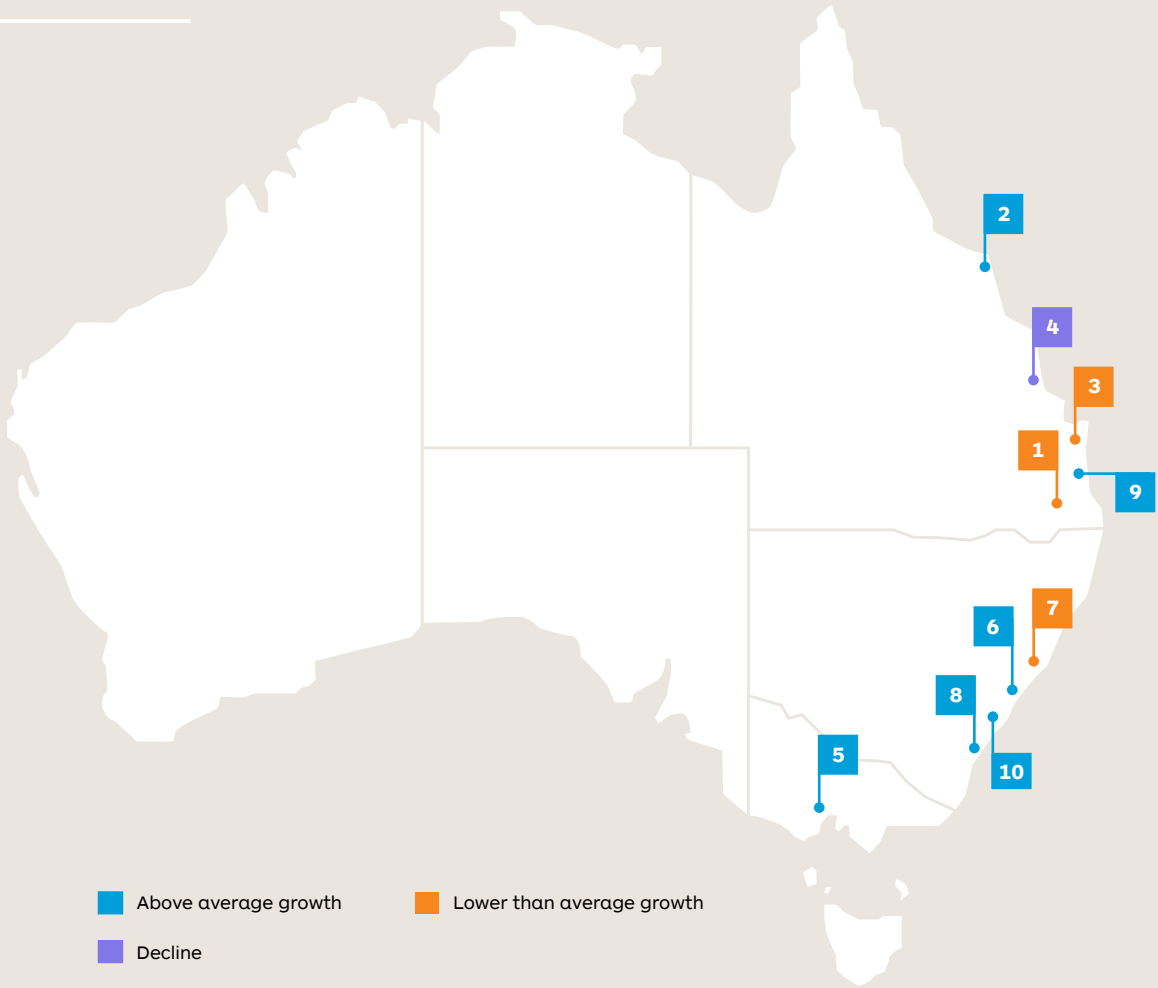
Hobbies & Recreational Goods



Who's buying?

Top 10 buying locations by volume

Rank	Locality	Growth (%)
1	Toowoomba, 4350	9.4
2	Mackay, 4740	13.2
3	Bundaberg, 4670	8.7
4	Gladstone, 4680	-0.5
5	Point Cook, 3030	10.9
6	Gosford, 2250	11.1
7	Wyong, 2259	6.9
8	Sanctuary Point, 2540	12.4
9	Hervey Bay, 4655	11.1
10	Campbelltown, 2560	13.5



For the second year in a row, regional towns in Queensland took out the top four spots for hobby and recreational goods purchases. Limited shopping options have continued to stimulate online demand in these areas.

The largest growth came from Campbelltown in NSW, predominately driven by games and toys purchases, up 29.1%. Hervey Bay, three hours north of Brisbane, is a new entrant into the top ten. With access to an abundance of

recreational activities, it's not surprising that sporting goods purchases are the main growth driver, which reached 24.9% growth last year.



Hobbies & Recreational Goods



Location trends

Growth

The suburbs of Claremont and Glenorchy in Hobart both saw over 20% growth in Outdoor, and Games & Toys.



Tasmania

Top growth locations	Growth (%)
Claremont, 7011	19.6
Glenorchy, 7010	19.3

Decline

Gladstone and Gin Gin in Queensland, recorded minor year-on-year declines.



Queensland

Declining locations	Decline (%)
Gladstone, 4680	-0.5
Gin Gin, 4671	-0.4



Hobbies & Recreational Goods



What can we learn?

Music growth to continue

As mentioned in the report last year, the Music category is highly impacted by the ongoing challenges facing the traditional retail environment, such as, store closures. Online purchase of musical instruments and accessories grew by 24.2% in 2017, an impressive five percentage points above the overall online average. Demand will vary by geography as the flow-on effects of these closures start to play out.

Competitive landscape and expanding product range

Retailers in the Variety Stores category are expanding their product lines to play in this space. In fact 13.6% of all Variety Stores purchases are hobby and recreational-related products³. As these retailers have a wider range and stronger buying power, they can often offer more competitive prices than dedicated retailers.

Highly priced online products

The Hobbies & Recreational Goods category has some of the highest priced items online. The average spend on automotive supplies is \$115.90 per online purchase and sporting products just under \$107.

It will be interesting to see how this market changes as more retailers start to play in this space.



24.2%

Growth in music purchases



Automotive supplies

\$115.90

Average spend

2nd highest spend per transaction overall



Sporting items

\$106.90

Average spend

3rd highest spend per transaction overall



Homewares & Appliances



Hobbies & Recreational Goods



Over
12%

Growth in Townsville
and Bowen

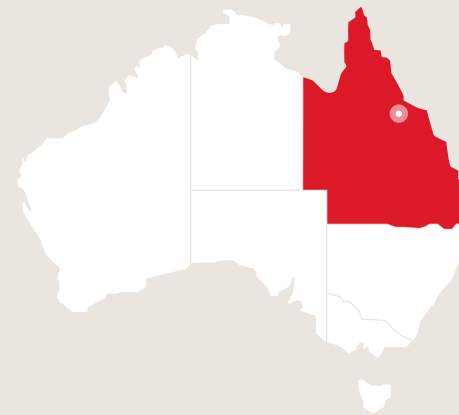


Physical gaming sales to slow down

The channel shift from physical purchases to online will continue to drive the overall category growth. However, the demand for gaming will soften with the rise of digital distribution platforms and gaming subscription services. This is a trend expected to accelerate in the coming years.

Townsville and Bowen are our tips for future growth

Suburbs along the Queensland coast dominated the top ten list in the Hobbies & Recreational Goods category. We predict the trend to spread to Townsville and Bowen. Known for their abundance of sunshine, these townships are already reporting growth rates above 12%. Due to the remote nature of these locations, expect to see higher growth in the coming year.



Our hot picks for 2018

- **Townsville, 4810**
- **Bowen, 4805**



Hobbies &
Recreational
Goods



Industry overview

Beyond Australia



Home



Overview



Fashion



Variety
Stores



Health &
Beauty



Homewares &
Appliances



Hobbies &
Recreational
Goods



Beyond Australia

99.9% of global online spend sits outside of Australia.

Online shopping is growing around the world, with the global eCommerce goods market worth USD \$1.57 trillion in 2017.

That figure is set to increase by a further 19% in 2018, and reach over USD \$2 trillion by 2019⁴.

This opens up more opportunities for Australian businesses to expand overseas. Today, Australia's top five export markets are China, Japan, Republic of Korea, United States, and India. Collectively, these countries represent 58.4% of our total export market⁵.

\$2.16^{tn}
2019 forecast

\$1.57^{tn}
2017

\$1.07^{tn}
2015



Digging Deeper

In this section, we are featuring two established trading markets, New Zealand and the United States, then taking a closer look into two emerging markets, India and China. The latter countries were selected due to the sheer size and potential growth opportunity for Australian businesses.

It is important to mention that these are not the only emerging global eCommerce markets. In our immediate surrounds, in South-East Asia, there is a growing middle class population with a desire to buy overseas goods. These countries include Indonesia, Malaysia and Singapore.

Whilst expansion overseas represents a great opportunity for businesses, retailers need to be aware of the nuances between the various global markets and tailor their approach accordingly. Additionally, consider applying the “RAT Test” by MIT Sloan Professor Don Lessard to assess the feasibility of expanding into an international market. It provides a guide to test if the company's competencies are relevant, appropriate and transferable to the target market.



Established trading markets

New Zealand

New Zealand is Australia's sixth top trading partner⁵, a close neighbour and the top eCommerce destination for Australian goods. The online market is comparatively small, at USD \$2.5 billion⁹ which is less than one percent of the US online market. The World Bank ranks New Zealand as the top country for ease of doing business, which shows that the size of the opportunity is secondary to making it easy to do business.

Kiwis shop on marketplaces such as Trade Me, Amazon and eBay. The most popular purchases from Australia are Fashion (both Women's and Menswear), Cosmetics & Beauty, Auto Parts and Books.

Not surprisingly, the Auckland region is New Zealand's top purchasing area for Australian goods followed by Canterbury and the Wellington region.

Product trends:

- Fashion
- Cosmetics and beauty
- Auto Parts
- Books



New Zealand's top three regions for online purchases from Australia:



United States

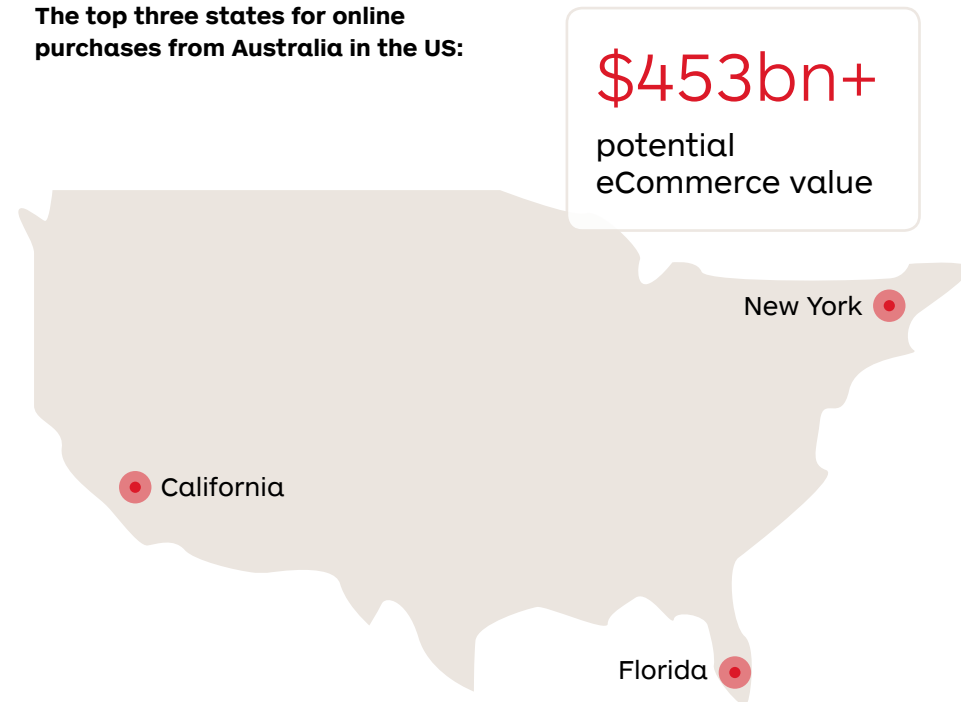
America is the birthplace of some of the world's most influential online marketplaces such as Amazon, eBay and Etsy. According to the US Department of Commerce, 2017 had the strongest year-on-year growth for US eCommerce in six years.

Online retail grew 16% to reach over USD \$453 billion. eCommerce represented 13% of total retail sales (excluding automotive and gasoline), making America one of the most mature online markets. Amazon is responsible for much of the gains. Latest figures from Amazon state that Amazon Prime paid members have exceeded 100 million globally.

The US retail market is about to be given a stimulation, with Afterpay's announcement to expand into America. This new payment service has become a powerful disrupter in Australia attracting 1.5 million customers and 12,000 retailers in under two years.

The regulatory environment is more conducive to businesses operating in the US, and Australian products are highly desirable there. Men and women's fashion were the most popular Australian purchases, followed closely by cosmetics and beauty items, games and toys, and auto parts. The top hot spot for Australian online purchasing is in populous California, followed by New York State and Florida.

The top three states for online purchases from Australia in the US:



Product trends:

- Fashion
- Cosmetics and beauty
- Games and toys
- Auto Parts



Emerging eCommerce markets

India

As the world's second largest country, India brings a population of 1.3 billion and an eCommerce market value of over USD \$20 billion⁶. This may seem comparatively small, at around 4% of the China online market, however it is not short of overseas investors. Amazon has committed \$3 billion of investments here and Walmart has agreed to invest \$16 billion for a stake in Flipkart.

This emerging market is growing at a fast pace and Amazon India is quoted to be the fastest growing marketplace in this economy. In fact, Amazon Prime added more paid members in the first year than in any previous geography in Amazon's history.

Fuelled by the government's policies to promote electronic payments, the mobile wallet market in India is also poised for significant growth. Mobile wallets such as Paytm (partly funded by the Alibaba Group) is gaining momentum, as consumers shift away from using cash and card. According to GlobalData mobile wallet transactions swelled almost 40 times in the four years to 2017, while the share of cash or cheque (COD) in eCommerce declined from 31% to 16% in the same period. India is now one of the top markets for mobile wallet adoption followed by China.

The best social networks to reach Indian consumers are through Facebook, WhatsApp, and YouTube. India has the largest active Facebook user base, the "potential reach" on Facebook IQ is 230 million, ahead of the US by 15 million. Meanwhile, the Facebook-owned messaging platform, WhatsApp currently has over 200 million monthly active users in India.

Indian consumers are buying mostly supplements and vitamins from Australian businesses, with the state of Maharashtra showing the highest number of purchases. Maharashtra is India's second most populous state, and is best known for its fast-paced capital, Mumbai. This is followed closely by the Delhi and Karnataka states.

India's top three states for online purchases from Australia:



\$20bn+
potential
eCommerce value

Product trends:

- **Supplements and vitamins**





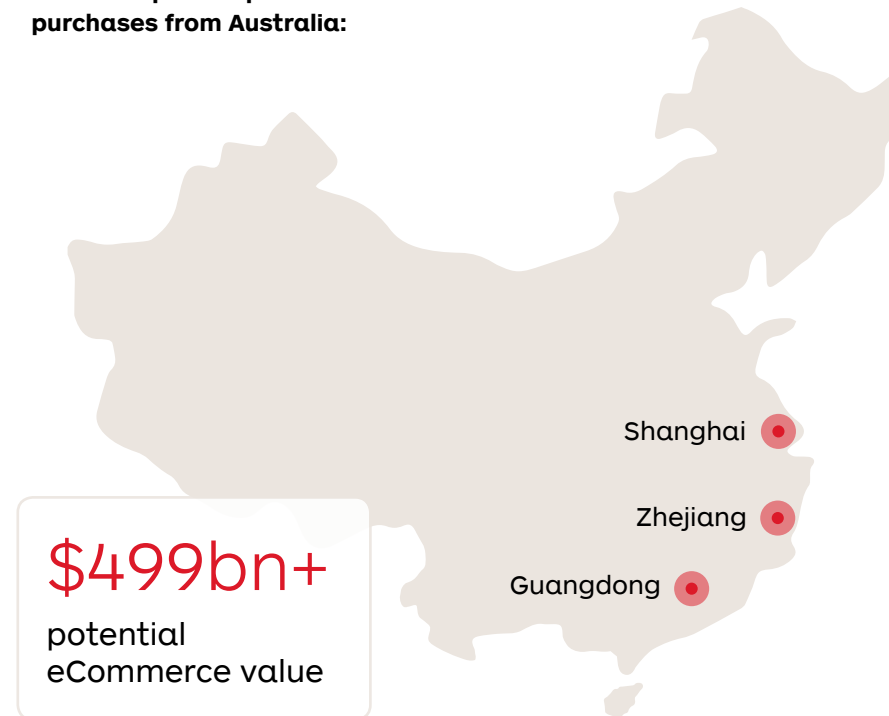
China

China is the most significant online market in the world by size. It has nearly 700 million users online representing more than half the population, and an eCommerce market of over USD \$499 billion⁶. Many Australian businesses are already tapping into the opportunities presented, making the most of marketplaces such as Tmall Global (owned by Alibaba Group) and JD.com, as well as social commerce platforms like Tencent's WeChat.

China has an advanced eCommerce ecosystem that is well ahead of the USA. Social media is part of everyday life and the trend is to be able to purchase directly from social platforms. WeChat leads the way, providing instant payment through mobile wallet functionality whilst remaining socially connected on Instant Messenger and groups.

The leading product trends are in the health sector, with Chinese customers turning to Australia for supplements, vitamins and baby formula, and increasingly cosmetics and skincare too. Customers in Zhejiang province, its capital Hangzhou, purchased the most Australian goods, followed by the Shanghai and Guangdong provinces.

China's top three provinces for online purchases from Australia:



Product trends:

- **Baby formula**
- **Supplements and vitamins**
- **Cosmetics and skin care**



Tips to expand into the Chinese market

Businesses wanting to move beyond existing marketplaces will have a number of hurdles to overcome in China. With over 20 years of experience in the Asia Pacific region, our expert Steven Foo shares some of his key insights into entering the Chinese market:



Find the right partner to navigate the China market

Firstly, finding the right partner in China is paramount. The size and complexity of the market requires a partner aligned with your goals, and with good local knowledge. However, a single partner may not be sufficient as China has 31 provinces, each with a different set of regulations.

Offline is just as important as online

Established eCommerce marketplaces are now focusing on the consumer journey and experience from online to offline. Whilst entry via online is the way to start, a combination of offline and online is critical to success as a business's engagement in China matures. This will help provide consumers with the choice and value they desire plus the opportunity to experience your product first hand.

Patience is a pre-requisite to doing business in China

Australia Post entered the Chinese market 11 years ago, through a joint venture with China Post. It was only in the last two years that there has been significant progress. The growth doubled last financial year and is on track to reach five times the growth in June. To facilitate this, businesses need to engage heavily in social media, find the right partner and offer the right product at the right price. In addition, understanding how Chinese consumers view foreign products is important. The perception of foreign products within China is very different to that of non-Chinese customers.





Do your research on China in China

Gaining an understanding of China from within China is key. Local interaction with other companies in the industry, as well as marketing and logistics partners, will provide additional insights into how to conduct business here.

Read China's five-year plan

China's five-year plan is an indicator into how the market will change as it provides a blueprint into the areas of focus. International expansion and going green were the key priorities in the last plan. This is especially important for Australia given China is our major trading partner.

Think big and move fast

In China, bigger and faster is always better. The quick turnaround times can be challenging for non-Chinese companies to keep pace. The good news is Australian goods are highly sought after and valued. They have a reputation for being clean, green, and authentic, which gives Australian businesses a distinct advantage.





Home



Overview



Fashion



Variety Stores



Health & Beauty



Homewares & Appliances



Hobbies & Recreational Goods





Methodology, references & contacts

Research methodology

The main sections of the report are based on analysis of goods bought online and delivered by Australia Post between January 2016 and December 2017. It also draws on modelled estimates from Australia Post consumer surveys, statistics from the Australian Bureau of Statistics (ABS), online retail environment data from Quantum, and publicly available information.

The data and insights are built on a subset of Australia Post deliveries, reported at postcode and state levels. Year-on-year growth rates are calendar year comparisons for 2017 on 2016. Percentage growth and share figures are based on transactions, unless otherwise stated.

For ease of reference, postcodes were substituted with suburb or locality names where appropriate. In instances where more than one suburb share a single postcode, one location name is referenced.

Product categories that represent more than 7% of online purchases have been included in this report. These are Variety Stores, Fashion, Health & Beauty, Homewares & Appliances, and Hobbies & Recreational Goods. The analysis excludes central business district (CBD) locations and postcodes with low household counts. Insights are based on modelled figures representing: the top buying locations by volume, postcode clusters with high year-on-year growth and locations experiencing slow or declining growth.

Delivery trends and location data were used to support the analysis of future growth areas. In the industry sections, this information is referenced as 'future growth' or predictions.

The 'Beyond Australia' section is based on Australia Post's analysis of goods bought online and delivered outside of Australia. It also draws on market figures from Euromonitor and Statista.com, BNZ and publicly available information.

A subset of Australia Post parcel data in the 12 months leading to December 2017 is used in the analysis of product trends by country and top destination regions.





References

- 1 Australia Post modelled statistics from parcel deliveries, consumer surveys, online physical goods index (a sub-set of NORSI, from NAB and Quantum) and publicly available data
- 2 Australian Bureau of Statistics (ABS) Retail Turnover excluding cafes, restaurants and takeaway food services for 2017 calendar year
- 3 Australia Post Consumer Survey 2017
- 4 Global eCommerce market are sourced from Euromonitor International
- 5 Department of Foreign Affairs and Trade (DFAT), Australia
- 6 Country opportunity sourced from www.statista.com
- 7 <https://www.finder.com.au/afterpay-day-generated-15-million-in-sales>
- 8 <http://www.powerretail.com.au/solution-providers/catch-of-the-day/>
- 9 Australia Post modelled estimates from BNZ Online Retail Sales



Contacts

Our analytics team provide a range of data solution services, and is responsible for putting together the insights in this paper. If you would like to discuss the information, including how it can be accessed and used effectively, please email us at einsights@auspost.com.au

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Australia Post is the largest parcels, freight and logistics provider in Australia. With an unrivalled network, retail and delivery footprint, we're making it easier for your business to connect to your customers, and find new ones, wherever in the world they may be.

Through our suite of eCommerce-driven logistics, supply chain and parcel delivery solutions, we can help you to provide seamless end-to-end eCommerce delivery experiences – from checkout to delivery – and everything in between.

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