Inside Australian Online Shopping

eCommerce update

November 2022

Australia Post

November the biggest month in Australian online shopping history

Driven by the popularity of Black Friday and Cyber sales, online purchases **topped last November's record by 3%, making this the biggest month in Australian online shopping history.**

On a month-on-month (MOM) basis, **online purchases grew 38%** compared to October. Comparing the last 12 months to the year prior, purchases were down 3.8% largely due to lockdown-driven spending in 2021.

A record 6+ million households shopped online this month. This is an additional half a million (570k) households on top of last month, with many looking to save money over this festive season.
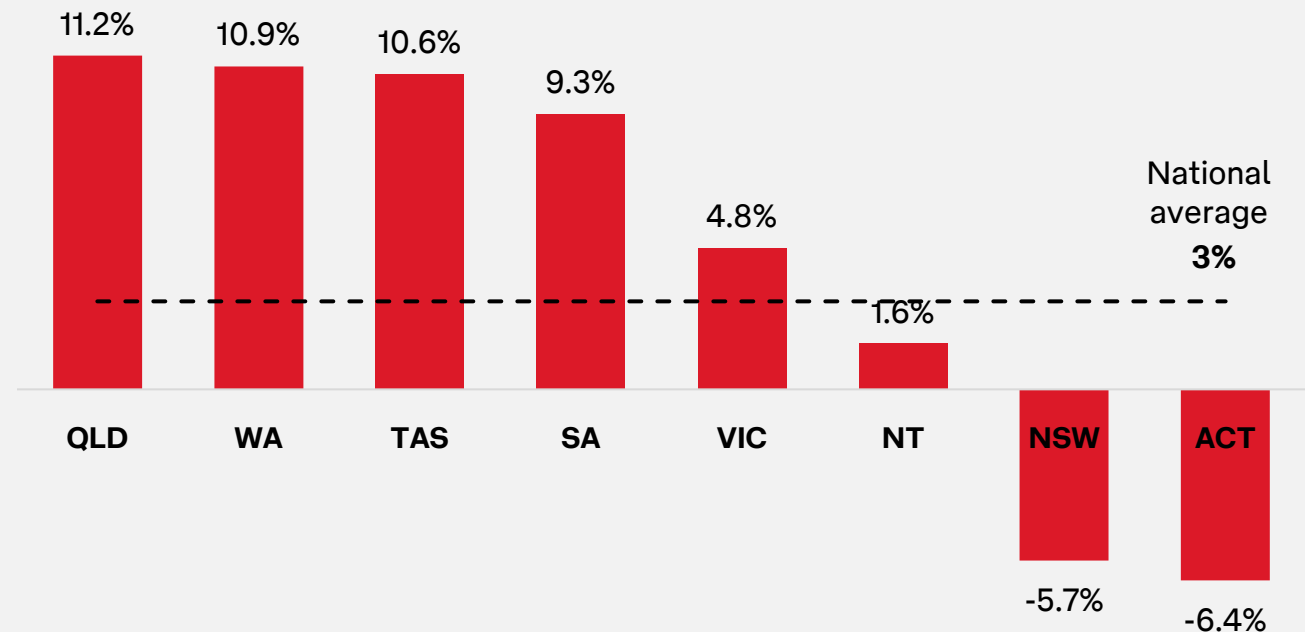
What's in this update?

This month we share insights about the popularity of Click Frenzy and the Cyber Weekend sales, including which categories were most popular for online shoppers.
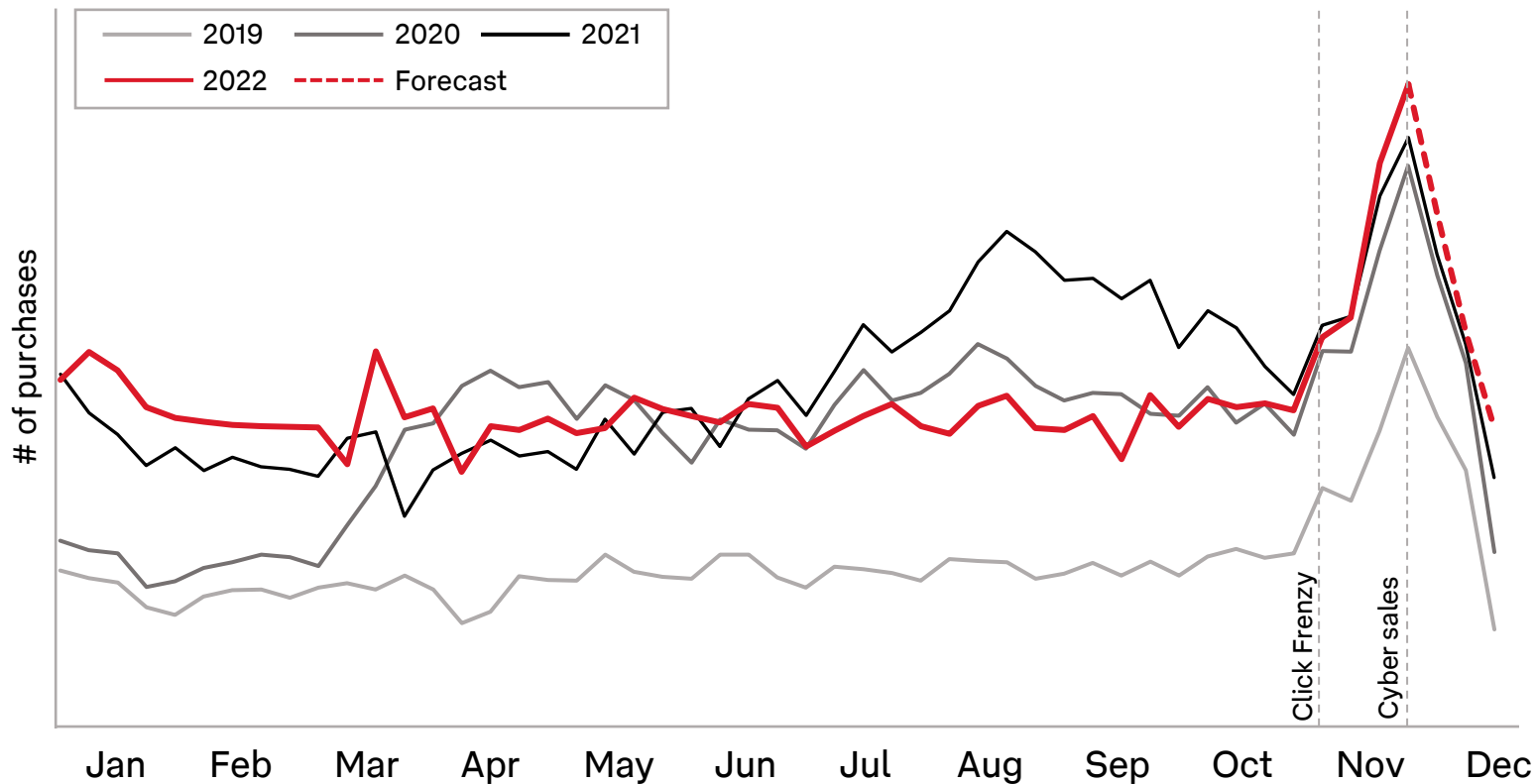
↑**38%** MOM   ↑**3.0%** YOY   ↓**3.8%** YOY
(12 months to November 2022)

November eCommerce purchases, YOY growth

11.2%	10.9%	10.6%	9.3%	4.8%	1.6%	-5.7%	-6.4%
QLD	WA	TAS	SA	VIC	NT	NSW	ACT

National average **3%**

Retailers getting a head start on the Black Friday sales

Online purchase volume by week

Legend: 2019, 2020, 2021, 2022, Forecast

X-axis: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec
Y-axis: # of purchases

Markers: Click Frenzy, Cyber sales

Despite increased foot traffic back into retail stores, the popularity of online sales events showed no signs of slowing.

This year's Cyber Weekend sales (Black Friday and Cyber Monday) was almost 7%[1] higher than last year's record Cyber Weekend period.

We saw a significant spike in volumes a few days prior to the official commencement of Black Friday on the 25th November. This indicates that retailers are beginning their sales early to capture a larger share of the wallet.

As we head towards Christmas we expect to see a dip in online purchases with most last minute purchases being made in store. We do expect to see an uplift in volumes for Boxing Day sales.

6+mil
households shopped online this month

1. Comparing two weeks 20th November 2022 – 3rd December 2022 to the same two weeks in 2021

Click Frenzy was popular, with fashion items among the most purchased

Reference period: 6th November 2022 – 19th November 2022

Online purchases **grew 20%[1] over the Click Frenzy period** as consumers looked to snag a bargain. The momentum and popularity of Click Frenzy sales continued from last year, with **online purchases only 1.4% lower than the same period last year**.

There were **4.2 million households** that shopped online over the Click Frenzy period – an **additional 320k households** compared to the prior two week period. General Clothing, Beauty products and Major & Discount Stores were the most popular categories during Click Frenzy sales.

↑**20%**
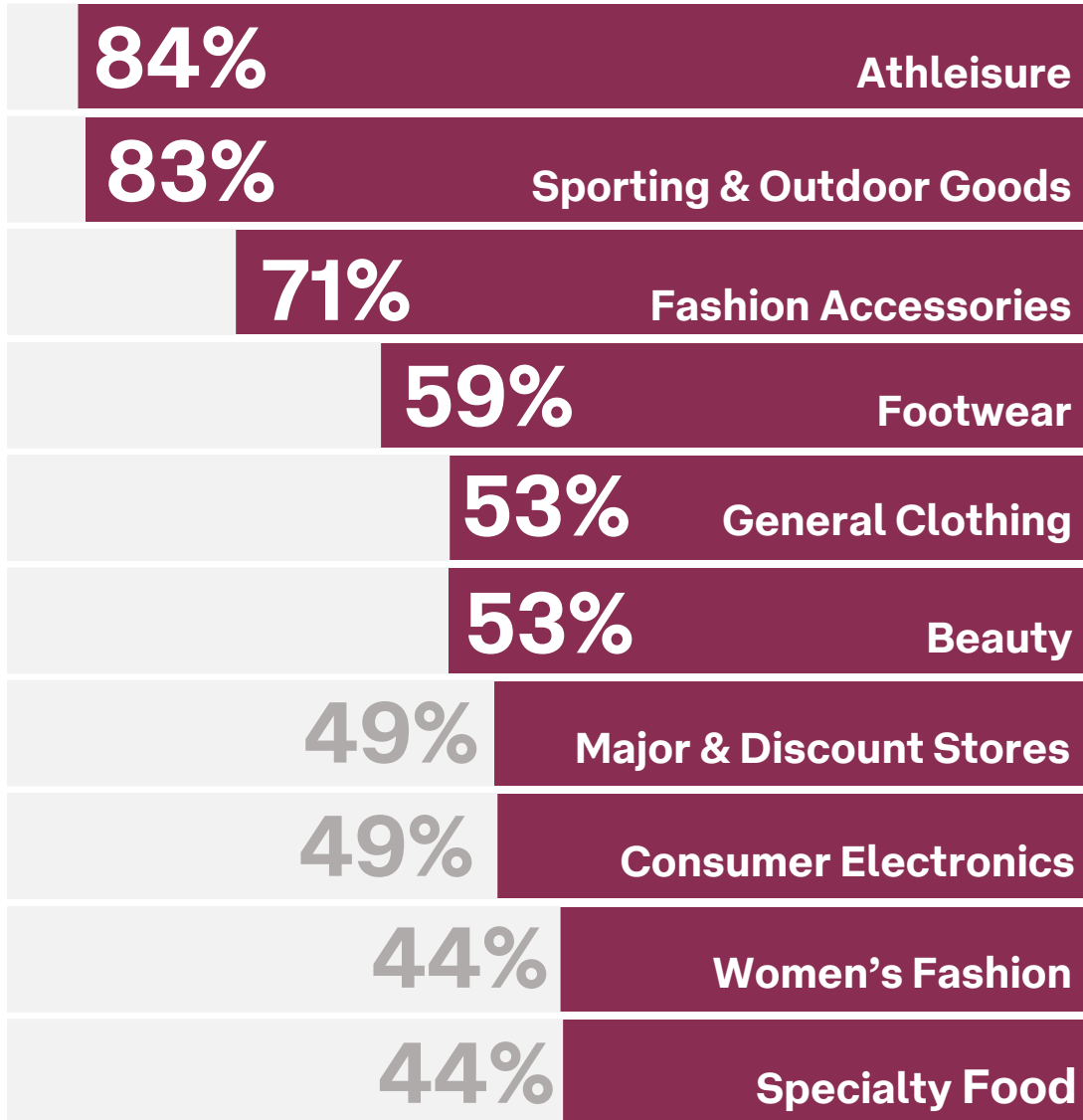**compared to the two-week period before Click Frenzy**

↓**1.4%** YOY
compared to same period (Click Frenzy) last year

What was most popular?[1]

Category	%
General Clothing	36%
Beauty	35%
Major & Discount Stores	34%
Footwear	33%
Athleisure	31%
Homewares & Appliances	30%
Wine & Liquor	27%
Fashion Accessories	26%
Specialty Food	25%
Women's Fashion	23%

1. Shows week-on-week growth, comparing the two week periods 23rd October 2022 – 5th November 2022 and 6th November 2022 – 19th November 2022 (Click Frenzy period)

What was most popular?[1]

Category	%
Athleisure	84%
Sporting & Outdoor Goods	83%
Fashion Accessories	71%
Footwear	59%
General Clothing	53%
Beauty	53%
Major & Discount Stores	49%
Consumer Electronics	49%
Women's Fashion	44%
Specialty Food	44%

Biggest Cyber Weekend sales on record

Reference period: 20th November 2022 – 3rd December 2022

A record Black Friday and Cyber Monday event, with online purchases **surpassing last year's record Cyber Weekend by 6.6%.** Online purchases grew an additional 42% compared to the two weeks prior (the Click Frenzy period[1]). Just over **1 in 3 purchases were from NSW.** Victoria and Queensland followed as the second and third biggest purchasers over the period.

4.9 million households shopped online over the Cyber Weekend period – **700k more households** than during the Click Frenzy period. Athleisure, Sporting & Outdoor Goods and Fashion Accessories were the most popular categories during the Cyber sales.

↑**42%**
compared to the two weeks prior (the Click Frenzy period)

↑**6.6%** YOY
compared to the same period (Cyber sales) last year

1. Shows week-on-week growth, comparing the two week periods 6th November 2022 – 19th November 2022 (Click Frenzy period) and 20th November 2022 – 3rd December 2022 (Cyber sales period)

Specialty retailer category insights
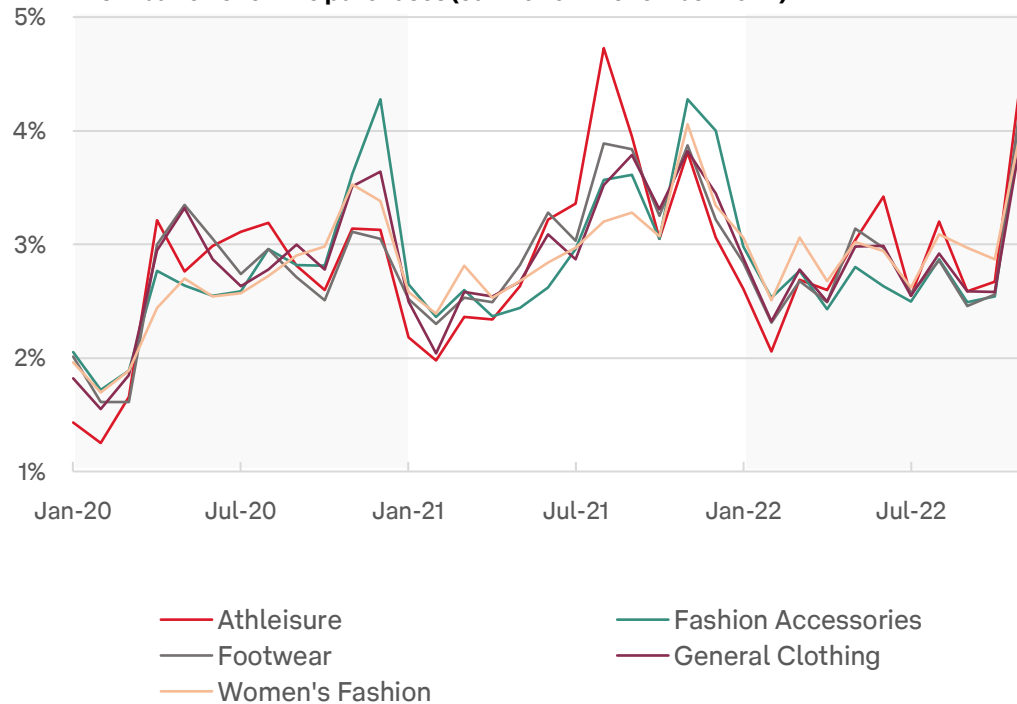
Specialty retailer category insights

Fashion & Apparel

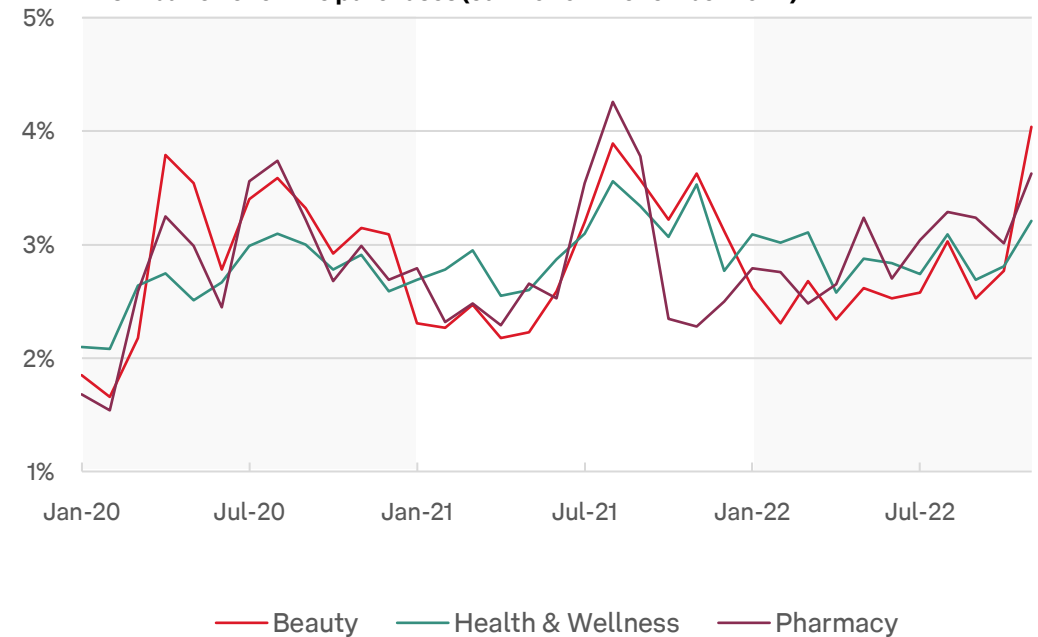⬆ **57%** MOM ⬆ **6.0%** YOY ⬇ **3.7%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]

Legend:
— Athleisure
— Footwear
— Women's Fashion
— Fashion Accessories
— General Clothing

Health & Beauty

⬆ **32%** MOM ⬆ **12%** YOY ⬇ **2.1%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]

Legend:
— Beauty
— Health & Wellness
— Pharmacy

1. Represents the volume contribution (%) of each month over the total period Jan 2020 – Nov 2022
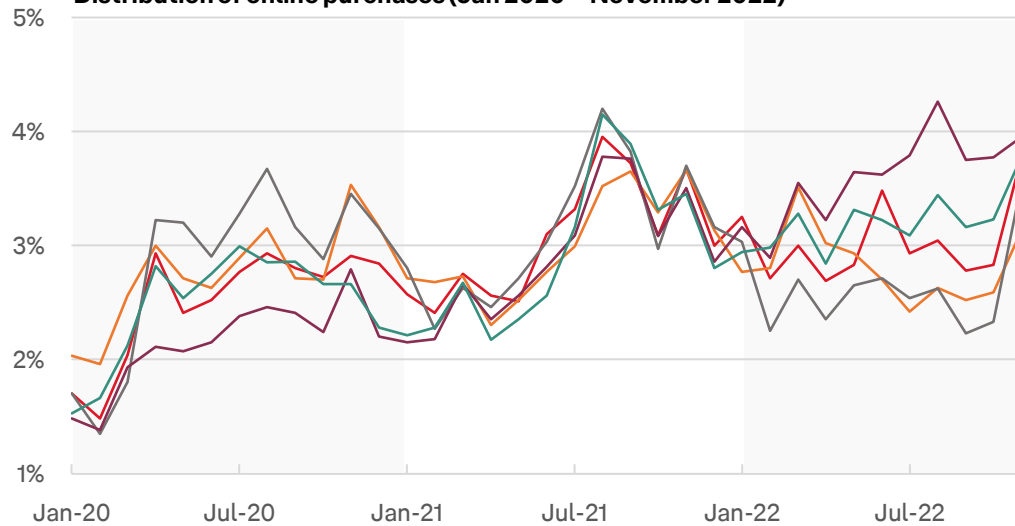
Specialty retailer category insights

Home & Garden

⬆ **32%** MOM ⬇ **4.8%** YOY ⬇ **5.5%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]

Legend:
- Baby Products
- Consumer Electronics
- Homewares & Appliances
- Pet Products
- Tools & Garden

Hobbies & Recreational Goods

⬆ **37%** MOM ⬇ **5.8%** YOY ⬇ **9.4%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]
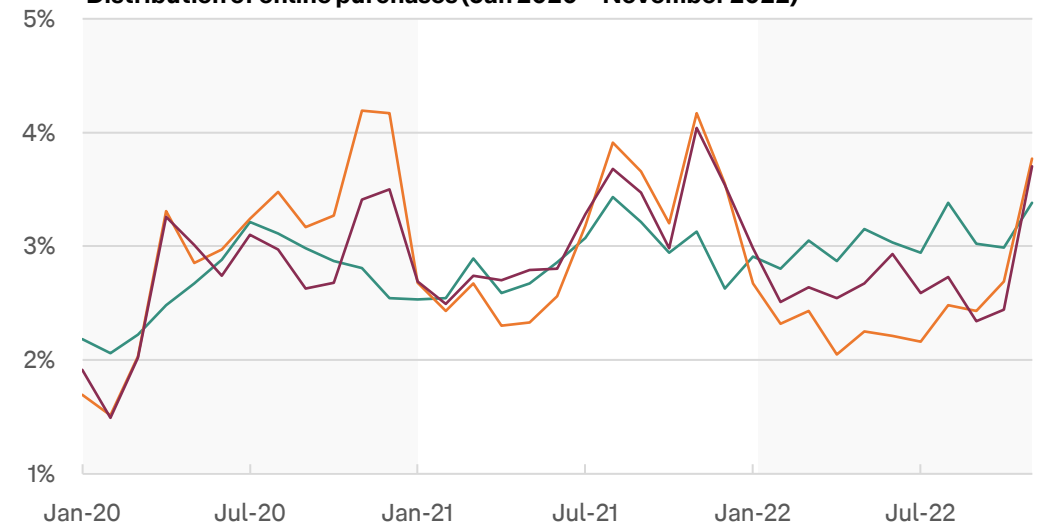
Legend:
- Auto Parts
- Games, Toys & Hobbies
- Sporting & Outdoor Goods

1. Represents the volume contribution (%) of each month over the total period Jan 2020 – Nov 2022

Specialty retailer category insights

Specialty Food & Liquor

↑ **50%** MOM   ↓ **2.4%** YOY   ↓ **7.4%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]

— Specialty Food   — Wine & Liquor

Variety Stores

↑ **35%** MOM   ↓ **5.0%** YOY   ↓ **10%** YOY
12 months to November 2022

Distribution of online purchases (Jan 2020 – November 2022)[1]

— Major & Discount Stores   — Marketplaces & Online Discount Stores

1. Represents the volume contribution (%) of each month over the total period Jan 2020 – Nov 2022

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Australia Post acknowledges the Traditional Custodians of the land on which we operate, live and gather as a team, and recognises their continuing connection to land, water and community. We pay respect to Elders past, present and emerging.

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