

# Australia Post eCommerce Report 2026

Unbox Australia's latest  
online shopping insights



# Contents

<b>Foreword</b> 03	<b>1</b> Meet your shoppers 06	<b>4</b> What's next for eCommerce? 26	<b>5</b> Final thoughts 36	
<b>Executive summary</b> 04	<b>2</b> Time to buy 09		<b>6</b> References 37	<b>7</b> Methodology 37
<b>3</b> Time to deliver 20	<b>8</b> Authors 38			

## Foreword

# Welcome to the 11<sup>th</sup> annual Australia Post eCommerce Report



As eCommerce continues to accelerate at remarkable speed, this report offers us an opportunity to reflect on how shopper habits are transforming – and how businesses are rising to meet those expectations.

2025 was another year of momentum, with 9.8 million Australian households embracing online shopping.

**“Across the generations, the numbers reveal a consistent desire for more: more value, convenience, speed and choice – spanning the entire shopping journey from discovery through to delivery.”**

As buyer habits evolve, so too must the businesses that serve them. At Australia Post, we’re proud of the role we play in enabling businesses to meet those expectations head-on, from enhancing delivery reliability to expanding out of home collection options and investing in the network that underpins Australia’s eCommerce economy.

For retailers, the research in this report is paired with clear, practical takeaways for turning insights into action and supporting bold decision-making in a dynamic market.

I hope it inspires you to confidently meet the expectations of today’s shoppers, while preparing for the opportunities of tomorrow.

**Paul Graham**  
Group Chief Executive Officer & Managing Director,  
Australia Post



[Click here](#) to unbox insights online, use AI-powered search or dive deeper into your category.

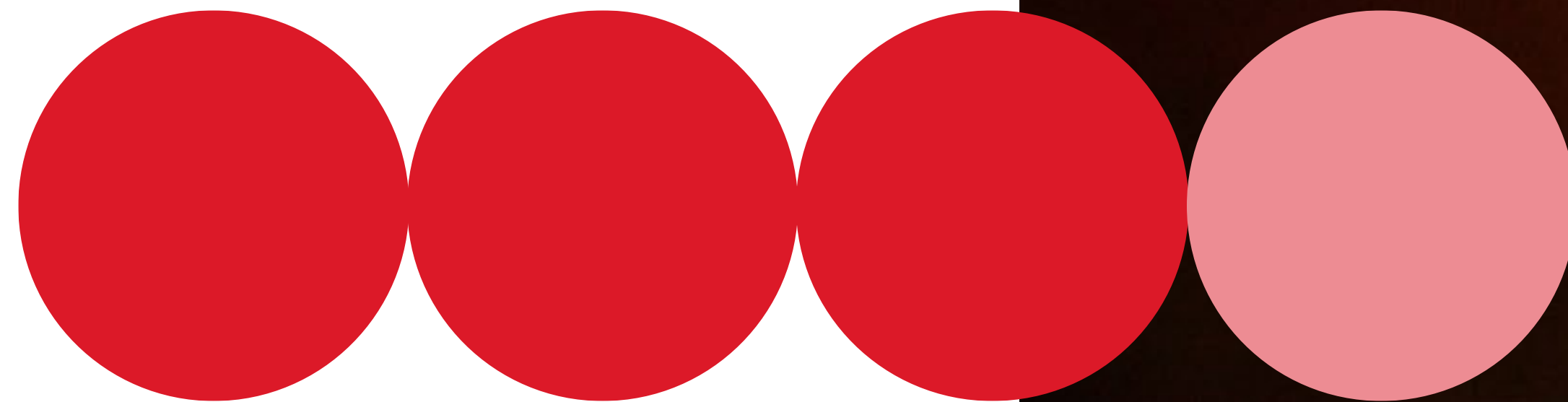
## Executive summary

Aussies are spending big online, hitting \$82.6 billion in 2025<sup>1</sup>, up 14% year-on-year (YoY).

9.8 million households shopped online in 2025, with 41% of households shopping online at least fortnightly – that's 117,000 more than the year before.



**3 in 4 say a good delivery experience makes them shop online more<sup>2</sup>**



# Executive summary

Unbox insights into what's driving the momentum

1

**Shopper promiscuity is rising:** Shoppers are browsing more selectively, with a stronger focus on value and buying when the deals are best. Thanks to AI, it's also easier than ever to compare prices. Today, **Aussie households are shopping across an average of 16 brands a year**, a figure that has been growing for the last decade.

2

**Purchase frequency is growing:** Individual basket sizes are falling, yet online spending continues to climb as consumers make smaller, more frequent online purchases. **Aussies are now making four additional online purchases each year** compared to last year<sup>3</sup>.

3

**The delivery experience is improving:** A seamless experience continues to tip the scales towards online shopping. **73% of shoppers say a good delivery experience makes them more likely to shop online instead of in-store<sup>2</sup>**. Faster delivery, growing collections options and improved tracking are removing friction, making online shopping feel smoother and more dependable than ever.



# Five lessons for businesses to carry through 2026

One



**Highlight value clearly**

73% of consumers wait for sales events before purchasing<sup>4</sup>, and 81% say they shop around for the best deals<sup>5</sup>. Keep messaging simple, make savings clear, reinforce value at every stage and offer social proof on product pages.

Two



**Prepare your business for an agentic future**

If you're not visible to AI agents, you're not converting. Get the lowdown on successful agentic commerce on [page 31](#).

Three



**Think connection, not transaction**

With AI redefining the customer journey, consistency and authenticity are key. Personalisation leads to loyalty and loyalty builds customer communities.

Four



**Ride the sales momentum**

Shoppers – particularly younger generations – are across all the major sales events and wait to buy when the time is right. 96% of Gen Z shoppers hold out for events like Black Friday and Cyber Monday<sup>4</sup>. Build anticipation, prime demand and discount strategically.

Five



**Give customers delivery options**

69% of consumers prefer a wide range of delivery options, including out of home collections and returns. 32% of consumers would choose one retailer over another if they offered out of home collection<sup>2</sup>. Show options early – on product pages – and again at checkout.

## Chapter 1

# Meet your shoppers

# Shopper snapshot

From discovery to delivery, how are Aussies shopping across the generations?

## Gen Z (1998–2010)



Gen Z are frequent online shoppers. They're highly engaged on social media for product discovery and have a strong focus on value. Out of all the cohorts they're most open to emerging technologies like agentic commerce.

Top stats unboxed:

Weekly online shop:



44% shop online weekly<sup>2</sup>

Delivery trend:

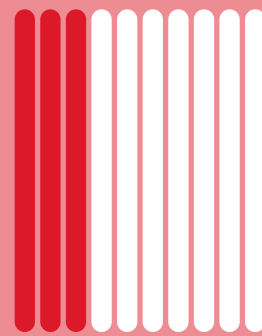


48% prefer collection points such as Parcel Lockers if they won't be home<sup>2</sup>

Emerging trend:

**3 in 10**

consult AI when researching what to buy<sup>5</sup>



Did you know...

2 in 3 (64%) buy second-hand every year, 17% more than monthly<sup>5</sup>



**69% use social media for product discovery<sup>2</sup>**



## Millennials (1981–1997)



Millennials approach online shopping with a strong focus on convenience and value, seeking flexibility and speed while embracing technologies to make shopping experiences more seamless and efficient.

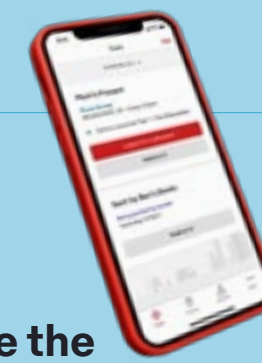
Top stats unboxed:

Weekly online shop:



47% shop online weekly<sup>2</sup>

Delivery trend:



Millennials use the AusPost app more than any other generation<sup>6</sup>

Emerging trend:

**56%**

are interested in buying second-hand items online<sup>5</sup>



Did you know...

74% already use AI, with 22% open to using agentic commerce<sup>5</sup>



**24/7 convenience is the top motivator of online shopping<sup>5</sup>**



## Gen X (1965–1980)



Gen X take a pragmatic approach to online shopping, favouring reliability and proven benefits while adopting new technologies like AI with caution.

Top stats unboxed:

Weekly online shop:



32% shop online weekly<sup>2</sup>

Delivery trend:



**68%** willing to wait longer for delivery if it means paying less<sup>2</sup>

Emerging trend:

**51%**

shop online to take advantage of online promotions<sup>5</sup>

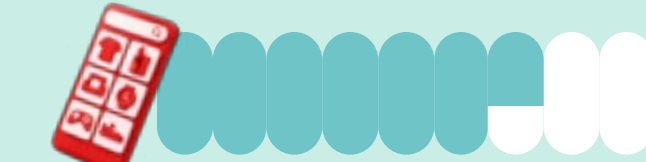


Did you know...

58% already use AI but only 15% like or love the idea of agentic commerce<sup>5</sup>



**66% shop on marketplace apps<sup>5</sup>**



# Shopper snapshot

## Baby Boomers (1946–1964)



Baby Boomers shop online with a focus on quality and simplicity, valuing free and reliable delivery. They're spending big, but only with retailers they trust and delivery they can rely on.

Top stats unboxed:

Weekly online shop:



23% shop online weekly<sup>2</sup>

Delivery trend:

57%

say free returns strongly influence where they shop<sup>2</sup>



Emerging trend:

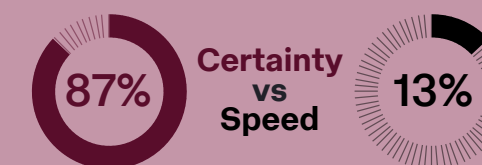
80%

agree that product quality is most important to them<sup>5</sup>



Did you know...

59% aren't using any AI in their daily lives and only 7% like the idea of agentic commerce<sup>5</sup>



Value delivery certainty much higher than speed<sup>2</sup>

## Builders (1925–1945)



Builders take a cautious approach to online shopping, prioritising reputable retailers and delivery certainty over speed. Their online spend continues to grow the quickest, but they're less motivated by sales than other generations. Instead, trust and reliability are key.

Top stats unboxed:

Weekly online shop:



10% shop online weekly<sup>2</sup>

Delivery trend:

70%

willing to wait longer for delivery if it means paying less<sup>2</sup>



Emerging trend:

Less than 1/2

hold out for sales before buying<sup>4</sup>

Did you know...

91% agree a reputable retailer gives them more confidence to buy<sup>5</sup>



62% worry about data security when shopping online<sup>2</sup>



## Top tip unboxed

Retention is vital

With the year's top shoppers – Millennials – shopping across apps, social media, marketplaces and more, retention should be a main marketing strategy focus.

- ✔ Use personalised lifecycle offers or omnichannel retargeting to nurture your first-time shoppers and keep them in your community
- ✔ Try sending a follow-up with a discount offer for their next purchase, or social retargeting ads for items they browsed, but didn't buy

## Chapter 2

# Time to buy



Year in review:

## Zooming out on 2025

### Consumer spending was strong in 2025, boosted by robust growth in household incomes

Consumers continued to increase their online spending, with a record \$82.6 billion spent online. The breadth, value, simplicity and fast fulfilment of online shopping has helped propel growth in this channel; now making up 24% of total retail spending.

Mortgagors led the return in spending, while growth amongst renters and outright owners was relatively weaker. As a result, the gap between mortgagors and other households grew over 2025.

**“Despite the strength in spending, consumers continued to concentrate their spending during sales events, like Black Friday and end of financial year, keeping competition in the retailing industry alive and well.”**

Spending in mid-sized states grew strongly over the year, boosted by robust income growth and resilient labour markets. WA and QLD led spending growth, while NSW and VIC were in the middle of the pack. This is despite spending growth in those states recovering over 2025. Spending in ACT and NT grew the slowest, consistent with the more sombre economic conditions in those regions.

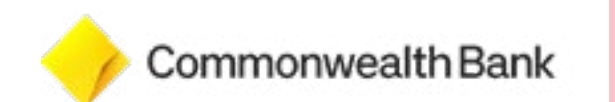
Spending growth on discretionary items accelerated over 2025. The strong growth in household incomes over 2025 meant consumers were able to grow their spending in both discretionary and essential items, and at the same time save more.

Looking ahead, income growth is expected to ease, and coupled with higher interest rate growth, household spending is expected to ease over 2026.

I encourage retailers to leverage the insights in this report to understand market dynamics and support informed decision-making in 2026 and beyond.



**Ashwin Clarke**  
Senior Economist,  
CBA



# Unboxing how Australians shopped in 2025

**\$82.6b**  
spent  
online  
in 2025

+14% YoY<sup>1</sup>



of total retail  
spend was  
online,  
+1.6 points YoY<sup>1</sup>

In 2025, consumers spent a record breaking \$82.6 billion online, representing around 24% of all retail spend

**Shopper promiscuity is rising:**

They're more selective, less loyal and laser-focused on finding value. The average household purchased from 16 different retailers in 2025, a figure that's more than doubled over the last decade.

**Smaller, more frequent purchases are now the norm:**

Driven by discount-led buying, shift to private label and use of subscription benefits such as free delivery.

**Delivery expectations are growing:**

Consumers now expect faster, more reliable and flexible deliveries: 69% of shoppers want delivery options at checkout<sup>2</sup>.

2025

**\$96**

average basket size,  
-0.4% YoY<sup>1</sup>



2024



## Top tip unboxed

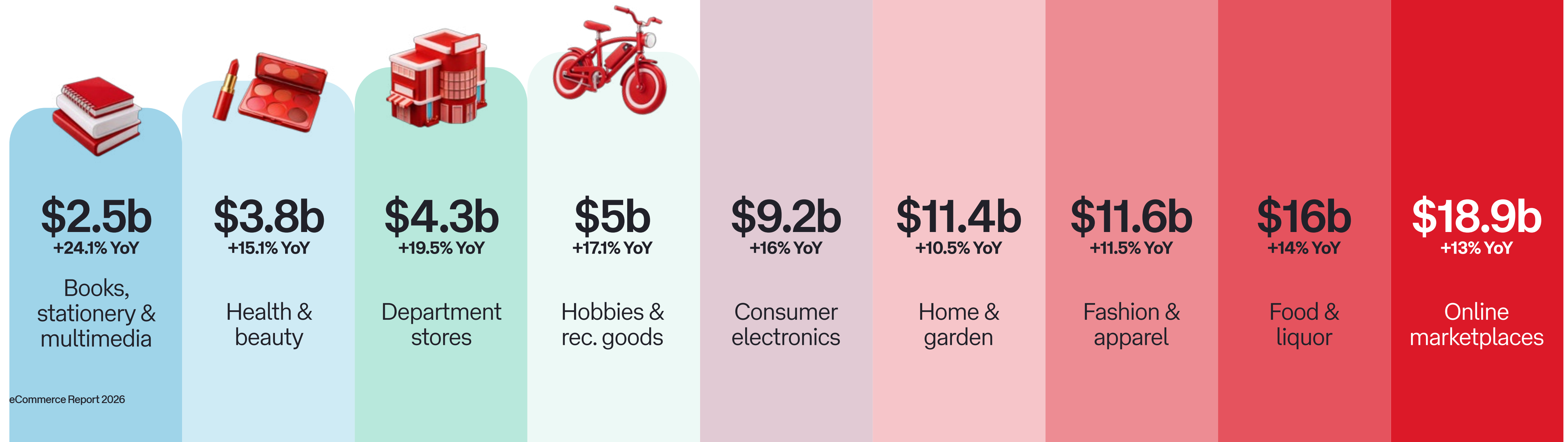
- 🕒 More annual purchases = more conversion opportunities. Don't miss out on this momentum
- 🕒 Showcase value upfront with clear savings messaging like "You've saved \$58 today" and reinforce loyalty perks with messages like "You'll earn 450 points, sign up now"

# Category spotlight: Double digit growth across the board

Books, stationery & multimedia enjoyed the fastest growth in 2025, up 24.1% YoY. Meanwhile, Online marketplaces cemented their reign for the third straight year, racking up a massive \$18.9 billion in spend. We explore marketplaces in more detail on [page 17](#).

 Unbox further insights into these categories and more [here](#)

Online spend by category 2025<sup>1</sup>

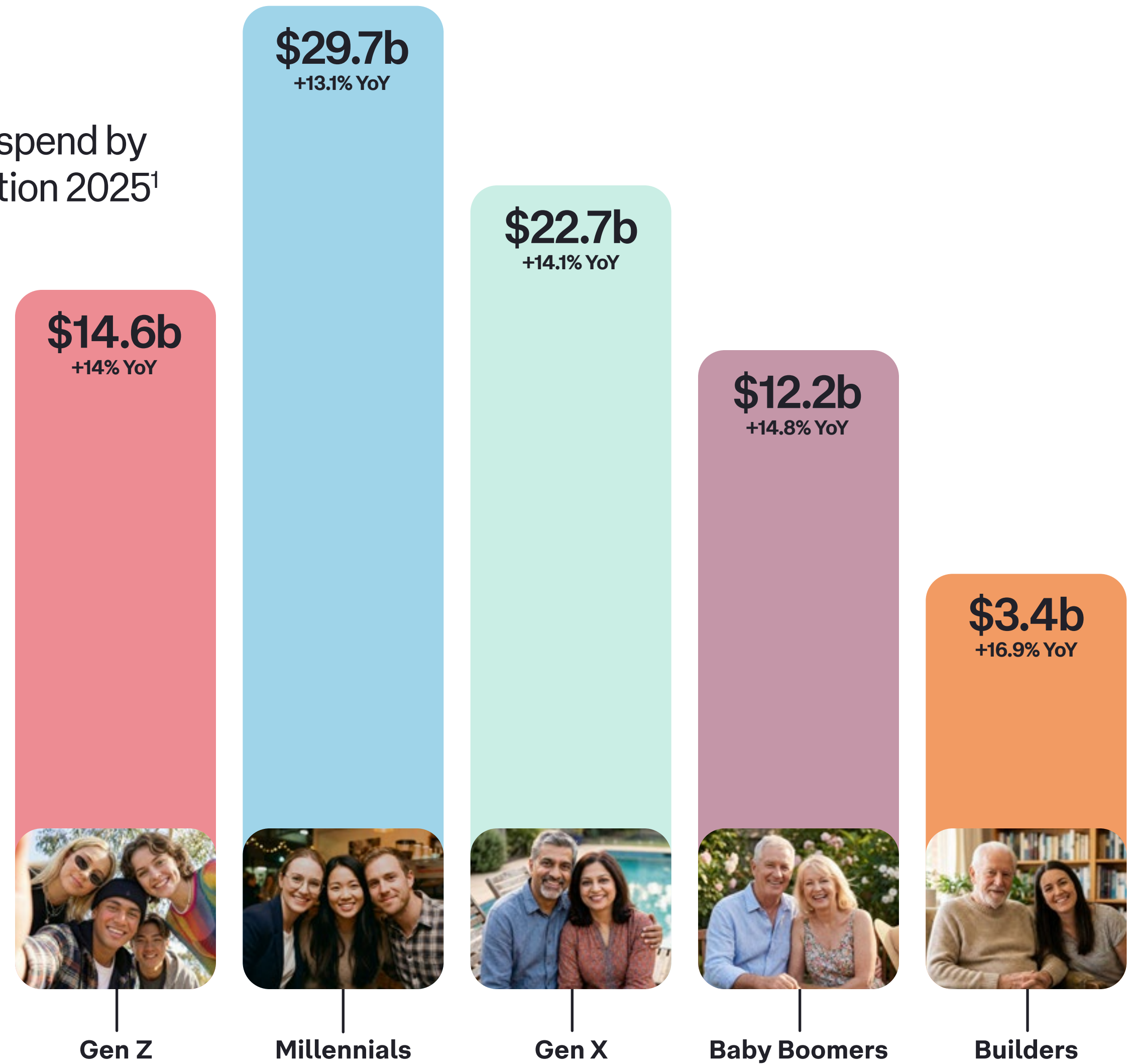
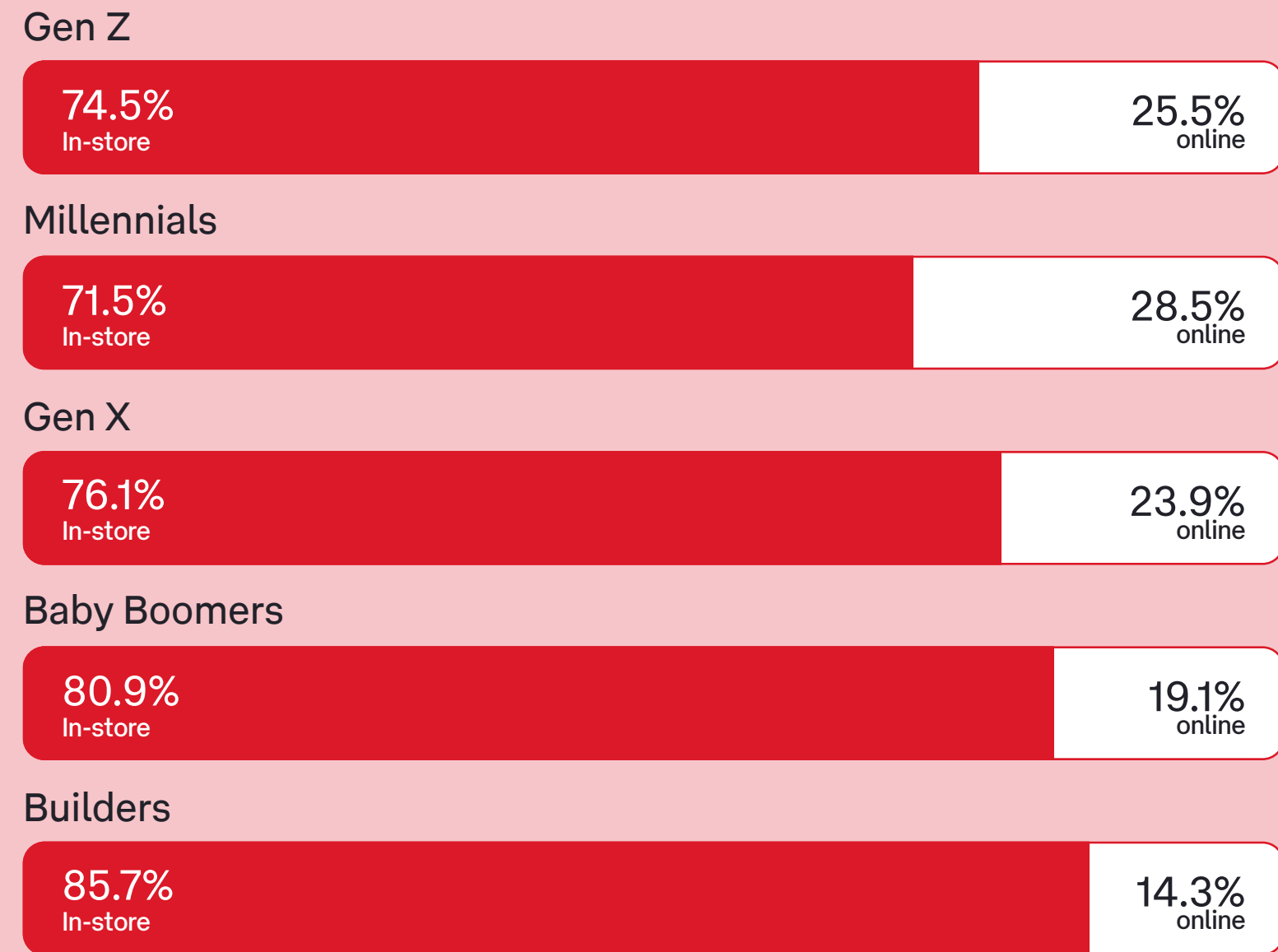


# Generational spend: The year momentum met moderation

Millennials were the top spenders in 2025, but the older cohorts delivered more growth. While all generations increased their total online spend, basket sizes shrunk – now \$10 less on average compared to 2020<sup>1</sup>.

## Online spend by generation 2025<sup>1</sup>

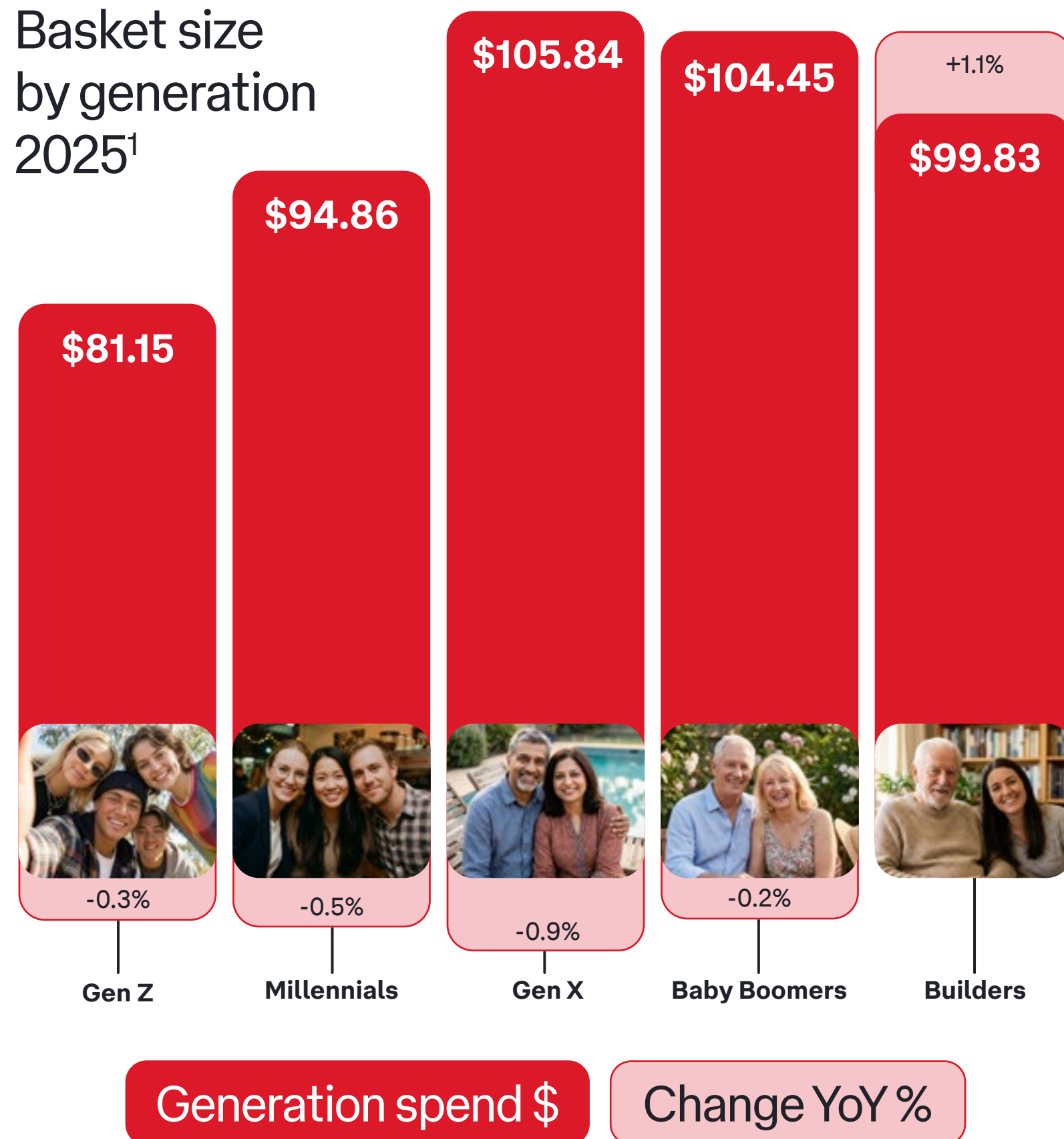
### In-store vs online spend by generation 2025<sup>1</sup>



# Generational spend: The year momentum met moderation

Gen X topped the generations for basket size in 2025, but all are in decline except Builders – signalling broad pressure on basket value.

## Basket size by generation 2025<sup>1</sup>



For Elysia Krstevski, Founder of Meke Baby, sustainable growth in average order value comes from helping customers clearly see how products fit into their real lives.

**“Customers are more conscious than ever about their spending. We find that when they truly understand how products work together, they naturally add more to cart.”**

**So, we focus on thoughtful bundles for real scenarios, education through content (to help them see the ‘why’, not just the ‘what’) and free shipping thresholds that feel achievable. If the value is obvious and the trust is there, customers will spend more without being pushed.”**



**Elysia Krstevski**  
Founder, Meke Baby



## Top tip unboxed

Today’s shoppers are looking for value more than ever – driving conversion and growing cart size are critical. Here’s how:

- ✔ Upsell and cross-sell: Suggest products that complement what’s already in the basket
- ✔ Reward bigger spends: With basket sizes on a downwards trend, offer perks for higher-value carts
- ✔ Free shipping seals the deal: Use delivery incentives to nudge customers over the line

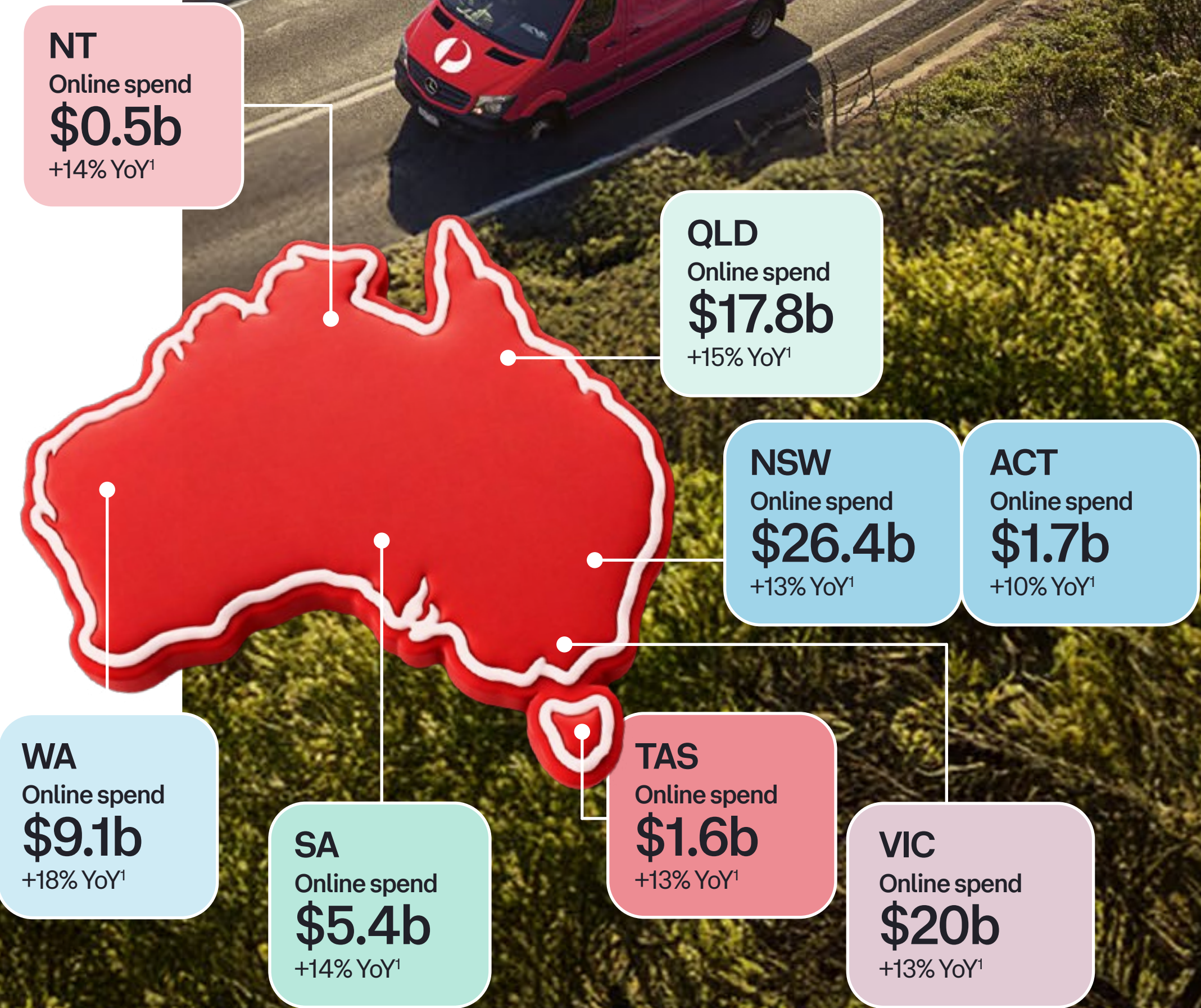
## Mapping Australia's online shopping boom

From bustling metro hubs to fast-growing regional centres, online shopping continues to spread across the nation

# A record 9.8 million households

shopped online in 2025, up 0.7% YoY

That's equivalent to **82%** of all households. **41%** of households shopped online at least fortnightly – that's **117,000** more than in 2024



# Shopping the Aussie way: Regional differences in eCommerce

Shopping behaviours vary by region, but growth is everywhere. Capital city households dominated online spend, while outer regional and remote areas delivered the highest growth.



## Top postcodes for online shopping 2025

### Top locations by volume

**4350**  
Toowoomba  
QLD

**4740**  
Mackay  
QLD

**3030**  
Point Cook  
VIC

### Top locations by volume per capita

**2000**  
Sydney  
NSW

**4184**  
Macleay Island  
QLD

**2015**  
Alexandria  
NSW

### Top growth locations by volume

**3336**  
Fraser Rise  
VIC

**4184**  
Macleay Island  
QLD

**6208**  
Pinjarra  
WA

	Capital cities	Inner regional areas	Outer regional & remote areas
Households that shopped online	7.1m	1.8m	0.9m
Online spend <sup>1</sup>	\$61.9b	\$13.8b	\$6.8b
Growth in online spend YoY <sup>1</sup>	13.8%	13.6%	14.4%

## Online Marketplaces: The eCommerce growth engine

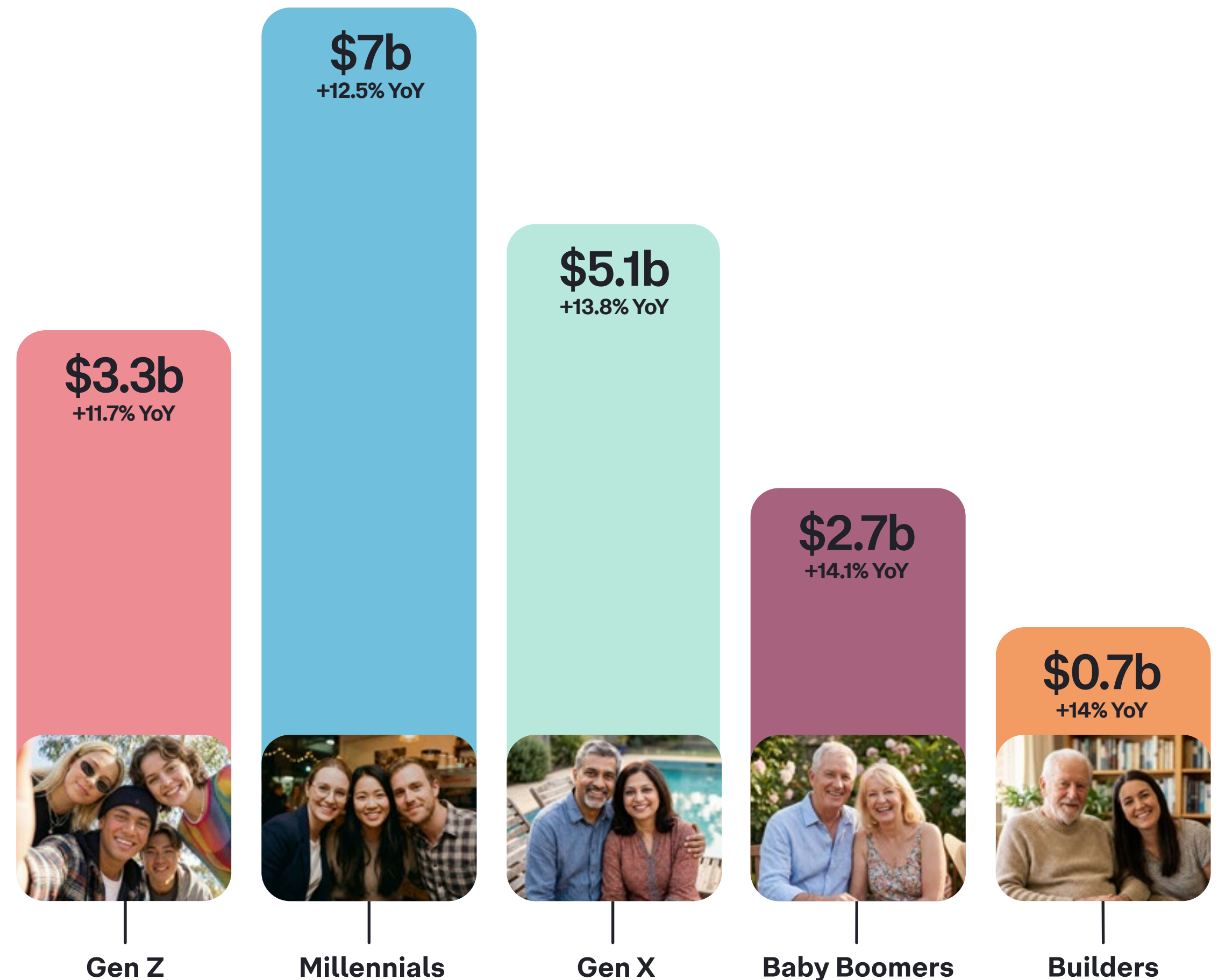
# An \$18.9 billion accelerating channel



Australians spent \$18.9 billion (+13% YoY) on pure online marketplaces in 2025<sup>1</sup>. It's a figure that only includes platforms like Amazon and Temu, and excludes retailer-owned marketplaces like Big W Market or Kmart Marketplace.

Even so, pure marketplaces account for 23% of total online spending, underscoring the strength of their value proposition: competitive pricing, vast product assortment and 'one-stop shop' convenience that drives both acquisition and conversion.

## Spend at online marketplaces by generation 2025<sup>1</sup>



## The new marketplace landscape: Pure vs retail-led models

No longer just the domain for global players, a different kind of marketplace has emerged – powered by Australian retail brands that plug into existing traffic, loyalty and fulfilment.

As a result, pure and retailer-led models now co-exist and increasingly compete for shopper attention.

**For small and medium retailers, marketplaces can become an immediate secondary sales channel** – offering access to massive audiences, in-built trust and a powerful pathway to scale.

But it comes with some risk. Intense competition, margin pressure and limited brand control must all be factored in to the equation.

## Capital-light, experience-rich: marketplace growth explained

The rapid rise of marketplaces is changing how retailers approach both growth and the shopper experience. For **Woolworths MarketPlus**, the central platform for Woolworths Group Marketplaces including BIG W Market, Everyday Market and Everyday Rewards Shop, it's not just a channel – it's a strategic lever for agile, efficient expansion.

**“The marketplace model is definitely capital-light”**

explains Mark Mansour, Managing Director of Woolworths MarketPlus. By removing traditional inventory barriers, retailers can move quickly:

**“allowing us to extend our range, enter new categories and serve more of our customer’s unmet shopping needs in a resilient, scalable way.”**

For shoppers, this means greater product depth from the same trusted retailers, at the same expected service level. Says Mansour: “success for us really depends on our ability to curate the right sellers, the right brands and maintain a consistent customer and delivery experience that can scale.”

Yet, the true competitive edge lies in marketplace’s ability to deliver both utility and discovery; getting it done while finding the delightful. While some customers come ready to transact, others just love the joy of discovery. The biggest winners in the future will be the ones who successfully unite the two – resulting in higher conversions, bigger baskets and loyalty powered by confidence and curiosity.



**Mark Mansour**  
Managing Director,  
Woolworths MarketPlus



Shopping on marketplace apps is now almost as common as shopping on retailer websites for Australian shoppers<sup>5</sup>



### Top tip unboxed

Marketplaces enable a hybrid approach for retailers. Use them as acquisition engines – leveraging marketplaces for scale and discovery, while nurturing your own channels for brand storytelling, loyalty and margin protection.

Marketplaces not part of your eCommerce strategy? Instead, differentiate on speed, offering next and same-day shipping options clearly at checkout.

## Checkout matters: Where conversions are won or lost

The perfect product offering, an optimised website, highly targeted marketing campaigns and a seamless delivery experience; none of it matters if you fail at checkout.

According to Shopify research,  
**52%** of Australians  
abandoned their  
cart because the checkout  
process was too long or  
complicated, rising to  
**67%** for higher  
spenders



The best-performing websites remove friction points for customers. Get Shopify's tips for optimising your checkout for conversions



**Shaun Broughton**  
Managing Director, APAC and Japan,  
Shopify



**Tip 1: Aim for a one-page checkout** to streamline the purchase experience by allowing customers to complete all checkout steps on a single page, rather than navigating through multiple sequential steps.

**Tip 2: Include accelerated payment options like Shop Pay, Apple Pay, Google Pay and PayPal Express** at the start of the checkout flow. These methods preload shipping and payment info to speed up transactions and boost conversion – Shop Pay can increase conversions by up to 50% compared to guest checkout.

**Tip 3: Make it easy for customers to pay their preferred way** by offering credit cards, PayPal, Buy Now, Pay Later, gift cards and promo codes. The broader the options, the fewer reasons for customers to abandon carts.

**Tip 4: Remove mandatory account creation** to reduce barriers, enabling new or infrequent customers to purchase quickly without logging in.

**Tip 5: Display trust badges and SSL certificates** clearly to build customer confidence in sharing personal data.

**Tip 6: Leverage abandoned cart notifications** via email or SMS, offering incentives like discounts or free shipping to recover lost sales.

## Chapter 3

# Time to deliver



## Parcel Lockers: The new standard for choice and flexibility

Across the globe, out of home (OOH) delivery is accelerating as both eCommerce and recommerce reshape the way shoppers want to receive and return parcels. In countries like Germany, OOH deliveries have become mainstream, driven by dense locker networks and strong consumer preference for flexibility.

Australia is on a similar trajectory, driven by Australia Post's expansion of Parcel Lockers across the country – but we're not there yet.

**42%** of consumers don't know about Parcel Lockers. But once they do, **74%** would consider using them<sup>6</sup>

While we're not at European adoption levels, OOH deliveries in Australia are growing at around 17% YoY, reflecting shifting consumer expectations for convenience, optionality and autonomy in the shopping experience.



### What consumers tell us

More choice

69%

69% like getting a wide range of delivery options at checkout including OOH collections and returns<sup>2</sup>

Easy to use

92%

92% say that Parcel Lockers are easy to use<sup>9</sup>

Safer & secure

43%

43% prefer parcel deliveries to out of home collection points, such as Parcel Lockers, over home because they're safer, secure and reduce the risk of theft<sup>2</sup>

Drives switching

32%

32% would switch retailers to access out of home collection points such as Parcel Lockers<sup>2</sup>

# Parcel Lockers: The new standard for choice and flexibility

No longer a ‘nice to have’

Nailing the delivery experience in 2026 means providing shoppers with OOH options; it’s a strategic play to help boost conversion, improve first-time delivery success and even reduce costs from fewer customer enquiries.

Parcel Locker deliveries achieve **more than three times higher NPS** compared to missed deliveries



This beauty leader actively promotes Parcel Lockers at checkout as a way to give greater last mile control back to shoppers. Here’s why Oz Hair and Beauty customers love it:

**“Shoppers love customisation options at checkout. Being able to add another way for customers to shop how they want allows a more personal and unique experience,”** explains Guy Nappa, Oz Hair and Beauty Chief Operating Officer.

“Customers who use lockers love the certainty. The top reason for selecting this option is to avoid having their parcel carded,” he says.



**Guy Nappa**  
Chief Operating Officer,  
Oz Hair and Beauty

OZ HAIR AND BEAUTY



## Top tip unboxed

Are you meeting shopper expectations for more delivery options?

- ✔ Offer delivery flexibility like Oz Hair and Beauty by integrating the Collection Points widget, API or Shopify App
- ✔ Feature OOH options on product pages, FAQs, shopping carts and email comms
- ✔ Highlight the benefits clearly like ‘collect any time’ or ‘never miss a delivery’
- ✔ Encourage repeat orders with exclusive discounts or perks for locker users

# From perk to priority: Delivery speeds are accelerating

There's no doubt the bar is raising on delivery speeds. Consumers expect fast shipping, though not at the expense of reliability.



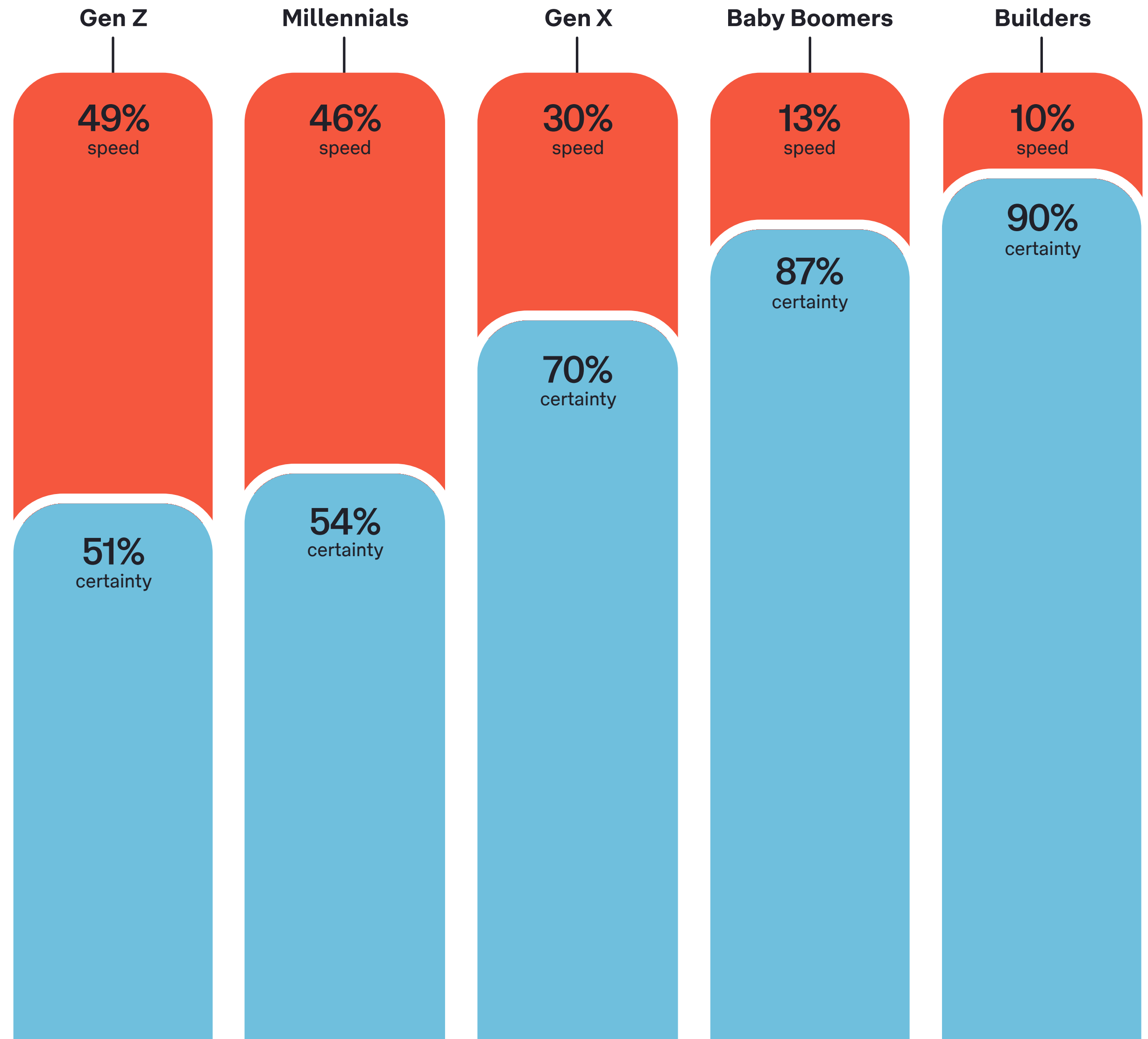
**26%** of consumers expect deliveries to arrive same-day or next-day\* when it's time sensitive or for special occasions<sup>2</sup>



**43%** are willing to pay extra for same-day or next-day\* deliveries, especially Gen Z (59%) and Millennials (59%)<sup>2</sup>

\*Same-day delivery is same calendar day, next-day delivery is next calendar day.

## Preference for **speed** vs **certainty** by generation 2025<sup>2</sup>



From perk to priority:

## Delivery speeds are accelerating

For THE ICONIC, fast and reliable delivery is fundamental to remaining competitive in eCommerce, and important levers for conversion and retention

**“We’re seeing an increasing demand for orders to arrive in under 48 hours (measured from checkout time to delivered).”**

The data tells the story. Depending on the product or day of the week, “we observe a 3-10% decrease in conversion for every additional day added to the delivery time shown at checkout,” says Blake Egglestone.

**What are THE ICONIC’s strategies to enable speed?**

“Speed starts in our Fulfilment Centre, which is engineered around same-day order turnaround.”

**“Processes, staffing and systems – including a fast, highly choreographed pick-and-pack operation – pair with a network strategy built for minimal touch points.”**



**Blake Egglestone**  
Associate Director Delivery,  
THE ICONIC

**THE ICONIC**



### Top tip unboxed

Here’s what you need to consider –

- ⊙ **Extend pick-and-pack windows:**  
With consumers shopping during evenings and nights, to enable next-day delivery, consider evening pick-and-pack shifts
- ⊙ **Determine the delivery cost strategy:**  
Absorb it, price it into the product, subsidise it or pass it directly to the customer
- ⊙ **Evaluate fulfilment design:**  
Centralised networks may require stronger same-day or next-day delivery capabilities to compete with localised fulfilment models
- ⊙ **Trial free next-day delivery thresholds:**  
Test offering free next-day delivery above a spending threshold and monitor conversion uplift against margin impact
- ⊙ **Benchmark delivery performance:**  
Check out how you stack up against your category [here](#)

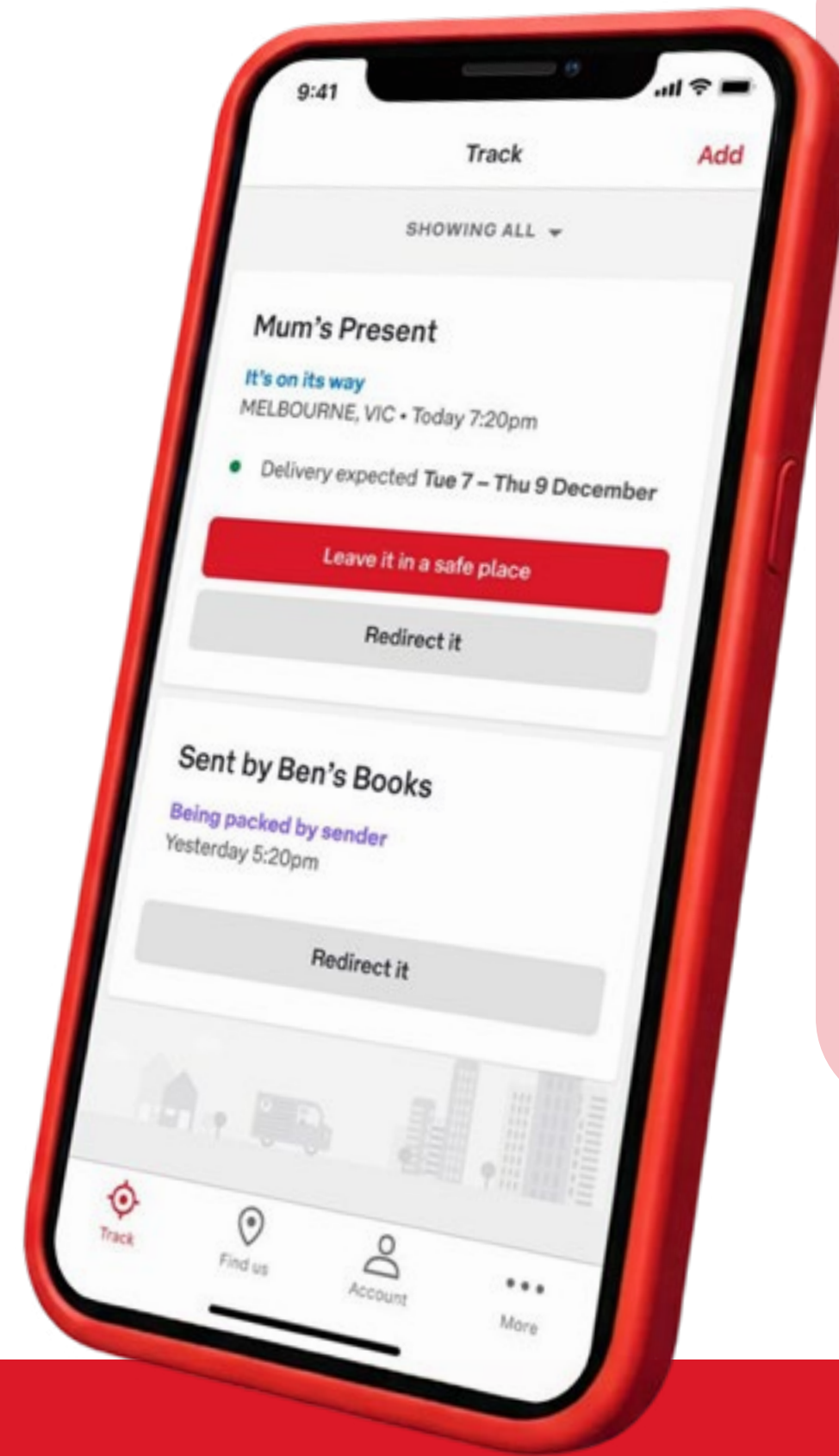
# Trusted tracking – without the clutter

Transparency, certainty and control underpin a great last-mile experience. Shoppers want real-time updates, proactive notifications and seamless ways to manage their deliveries – all in the palm of their hand.

Mobile apps have become the most effective way to deliver this experience. Unlike email or SMS, apps offer a single place for tracking, inflight redirection capability and proactive notifications.

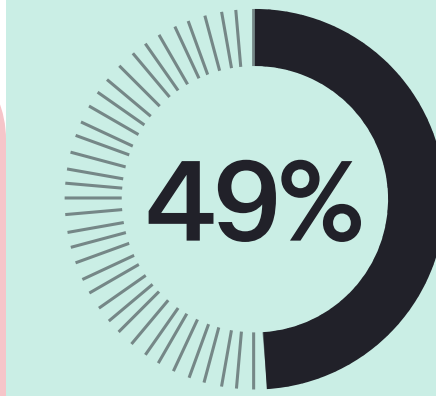
Tracking apps like the AusPost app are a no-cost, high-impact move that can help improve the customer experience

- 8.7m (+21% YoY) unique AusPost app users in 2025
- 33% growth in push notifications sent in 2025, as customers seek greater control and confirmation of deliveries
- Customers using the app are up to four times less likely to raise delivery-related cases during peak, reducing support costs

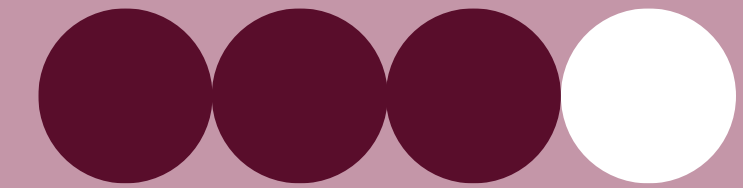


**70% say poor delivery communication at checkout**

makes them less likely to complete a purchase<sup>2</sup>



of shoppers say receiving updates from multiple sources makes the experience feel cluttered and confusing<sup>2</sup>



**3 in 4**

want delivery-related notifications to come from the carrier<sup>7</sup>



## Top tip unboxed

Promoting the AusPost app in order confirmation emails is a quick win for retailers big and small, that gives greater control and tracking visibility directly to customers.

## Chapter 4

# What's next for eCommerce?

Fast, cheap and everywhere:  
**The eCommerce  
revolution Aussie  
retailers can't ignore**



Expert voice:  
The future of commerce in an agentic world

The days of treating eCommerce as a pandemic-era anomaly are over. Many shoppers have permanently shifted online for value, convenience and choice, and global marketplaces are racing to claim their loyalty.

**“2025 was a roller-coaster for Australian consumers and retailers.”**

Inflation trended down for much of 2025, allowing some interest rate relief before a late reversal. The good news is that household capacity to spend improved over the year, driven by strong real wage growth and improving consumer sentiment.

Real consumer spending is expected to grow this financial year, with the ‘winners’ expected to be those trading in more discretionary goods, including large online retailers. Despite a more uncertain interest rate outlook, continued growth in 2026-27 is likely – particularly for eCommerce.

Anecdotally, mature Aussie retailers are setting ambitious year-on-year eCommerce ‘stretch’ targets of 20-30%. However, these ambitions are often balanced with caution, with most leaders expecting ‘core’ growth to sit closer to 5-10%. Key investment themes for growth are consistent – agentic commerce and social commerce.



**Harsha Maddipatla**  
Partner,  
Retail Strategy  
Deloitte

**Deloitte.**



# Fast, cheap and everywhere: The eCommerce revolution Aussie retailers can't ignore

## Key trends to watch

from Harsha Maddipatla  
Partner, Retail Strategy at Deloitte

### Recommerce

The recommerce market in Australia is also expected to see continued growth (but slower than prior years), **driven by affordability and sustainability.** Retailers have an opportunity to capture value rather than ceding it to third-party platforms.



### Social commerce

Social-led shopping in Australia is expected to grow strongly. For retailers, this means **shifting investment upstream towards creators, integrating shoppable content and enabling checkout wherever discovery happens.**



### Global marketplaces

Global giants are crowding the market. Deloitte's 2025 Retail Holiday Report found that almost half of surveyed shoppers "always" or "often" consider global marketplaces when making purchase decisions. **Over a 12-month period, several major global marketplaces gained close to one million new Australian customers<sup>9</sup>.** Consumers may benefit on price, but risk erosion of local choice as SMBs struggle to compete.

### Agentic commerce

By 2030, **agentic AI is estimated to influence 30% of digital commerce transactions<sup>8</sup>.** This may occur even sooner. As commerce becomes increasingly agent-led, retailers need to optimise for AI discovery and evaluation – not just human persuasion. This means structured, machine-readable content that allows agents to confidently compare products on fit, price, delivery speed and certainty of outcome.



## Top tip unboxed

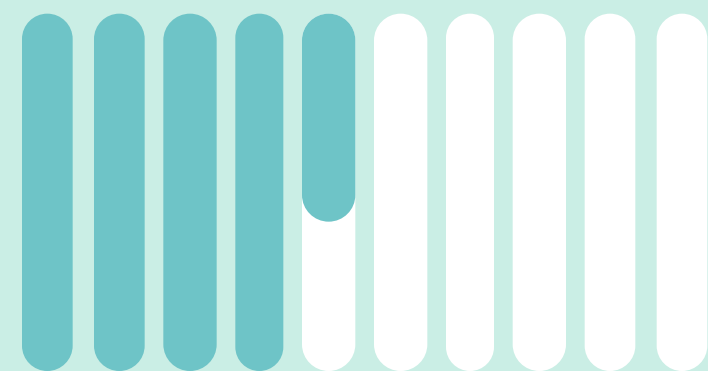
- ✔ eCommerce is your growth engine, not your side hustle
- ✔ Clean your data or get ignored by agentic AI
- ✔ Win the scroll to win the sale as consumers move to live shopping and social marketplaces
- ✔ Differentiate based on experience or get squeezed on price

# Circular commerce: How recommerce is unlocking growth and sustainability

Australians are no strangers to second-hand shopping.

Historically dominated by peer-to-peer marketplaces like eBay, the landscape is shifting – entering a structured growth phase with retailer-led recommerce pilots exploring buy-back and resell initiatives.

**46%**  
of Aussies buy  
second-hand  
items annually<sup>5</sup>



**USD\$6.75B**

Estimated value of the  
Australian recommerce  
market by 2029<sup>10</sup>



Top categories shoppers  
want to buy second-hand<sup>5</sup>

Books & Music **42%**

Homewares **35%**

Collectables **35%**

Electronics **32%**

Fashion **30%**

The  
shoppers  
view<sup>5</sup>:

- ✔ Cost savings
- ✔ Sustainability
- ✔ The thrill of it

VS

- ✘ Can't inspect
- ✘ Quality concerns
- ✘ Dishonest sellers

But, **45%** of shoppers acknowledge that buying directly from a retailer or dedicated recommerce platform addresses the core concerns around trust and quality<sup>5</sup>

**“Consumer attitudes toward buying second-hand have shifted significantly, with pre-loved now viewed as a smart, intentional choice rather than a compromise,”**

says Anne-Marie Cheney, Head of Recommerce at eBay Australia.

“While affordability remains important, buyers are increasingly motivated by quality, individuality and sustainability. Second-hand shopping has become part of how people express personal style, discover unique items and shop more consciously.”



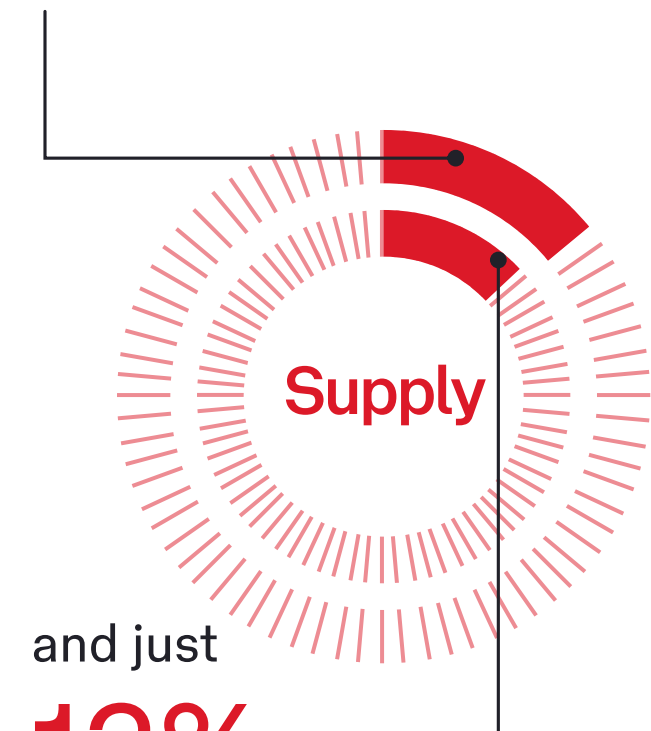
**Anne-Marie Cheney**  
Head of Recommerce,  
eBay Australia



# Circular commerce: How recommerce is unlocking growth and sustainability

Consumers are already participating at scale – retailers can capture that value

**14%**  
of Australian businesses sell or partner-to-sell second-hand or refurbished items<sup>5</sup>



and just **13%**  
offer trade-in or buy-back programs<sup>5</sup>

However, **73%**  
of Australian online shoppers are interested in buying second-hand or refurbished goods directly from retailers<sup>5</sup>



**37%**  
are buying directly from retailers each year<sup>5</sup>

## Start small, listen hard

Industry leaders recommend a phased and customer-centric approach. Here's what Gayle Burchell, Chief Commercial and Sustainability Officer at THE ICONIC has to say –

### Listen to your customers:

Rather than trying to build a full recommerce ecosystem on day one, take the time to ask customers what they care about. It might be a simple take-back program or a tightly curated pre-loved edit from your past collections, but don't underestimate the importance of trust. Importantly, prepare to be agile – test, learn and pivot.

### Build trust through transparency:

Clearly communicate how items are selected, repaired and priced. Make sure recommerce feels like a natural extension of your brand.

### Define success early:

Be very clear how you'll measure success – whether that is incremental revenue, reduced waste or increased customer loyalty.



**Gayle Burchell**  
Chief Commercial and Sustainability Officer,  
THE ICONIC

**THE ICONIC**



## Top tip unboxed

Partnerships are a great way to address the challenges with selling second-hand.

- ✔ Consider fulfilment and returns partners like Shiperoo or dedicated recommerce platform partners like Authenticated
- ✔ Businesses say that partnerships reduce operational burden, support sustainability goals and bring expertise needed to confidently manage logistics of selling second-hand

# Agentic commerce: Navigating through the new rules of eCommerce

AI adoption has surged, with 6 in 10 Australians now using AI. 28% of Millennials use it every day<sup>5</sup>. So, what's next?

Agentic commerce marks a major shift in eCommerce. For retailers, it's a fundamental switch from optimising for human engagement towards AI agent readability.

By 2030, global projected revenue orchestrated by agentic commerce is anticipated to reach up to

**USD  
\$5 trillion<sup>11</sup>**



Moving from reactive to proactive engagement, agents learn to anticipate needs even before they arise. Here's how it works:

- Sense**  
The agent monitors and predicts needs from human preferences, context and behaviour
- Discover**  
It scans the market, comparing prices, availability and delivery options
- Authorise**  
The consumer selects or allows the agent to purchase autonomously within set rules and budgets
- Transact**  
The agent purchases, pays and selects delivery preferences
- Track**  
It tracks delivery, handles returns and loyalty
- Learn**  
The agent learns from outcomes to improve future decisions

It's a concept that's quickly becoming a reality



**Retailers** like Walmart in the US and Etsy have partnered with OpenAI to enable conversational shopping directly through ChatGPT and other AI interfaces.



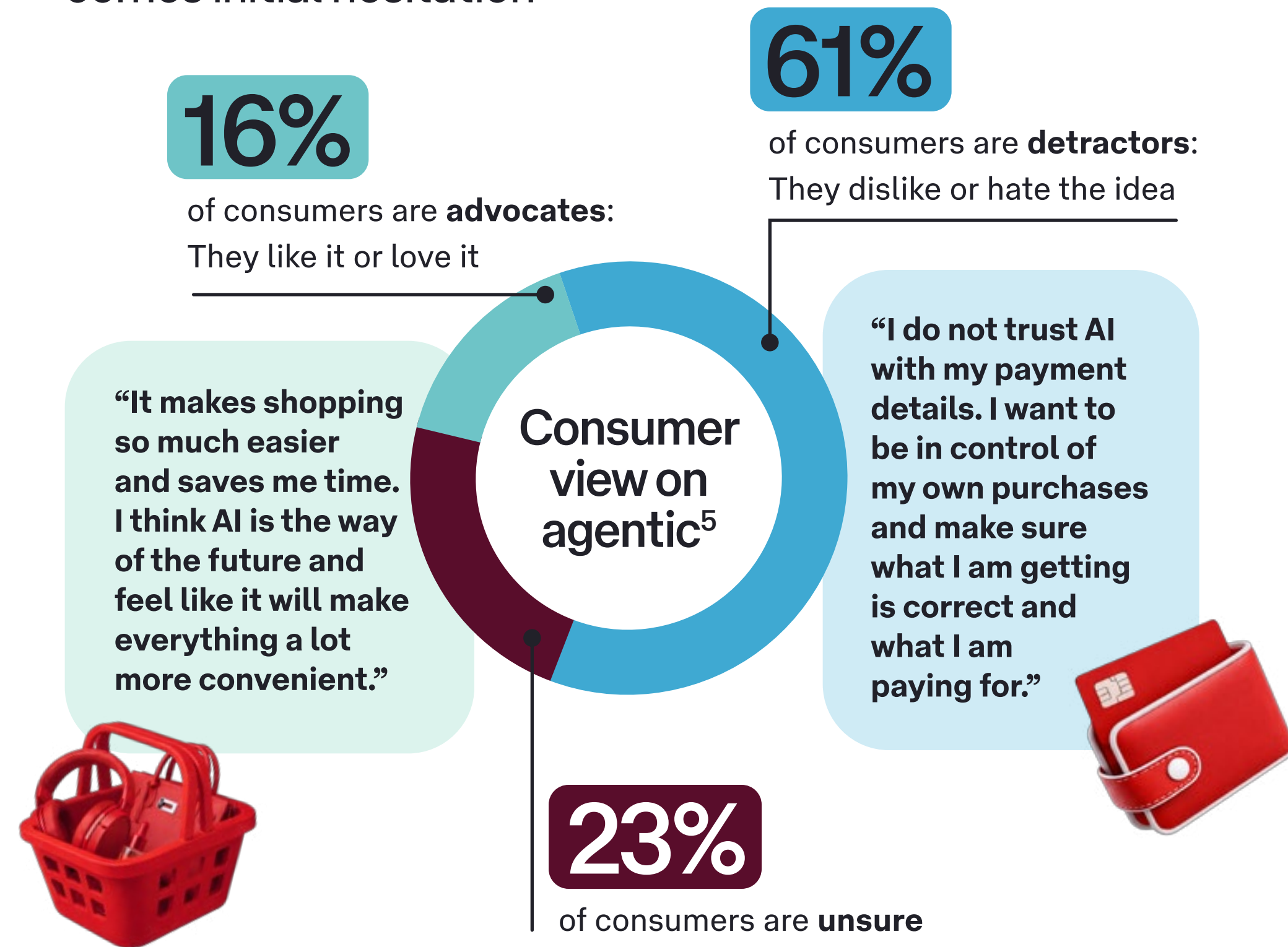
**Shopify** has developed AI commerce infrastructure enabling merchant products to be instantly discoverable and purchasable through AI platforms and agents like ChatGPT, Microsoft Copilot and Google AI mode.



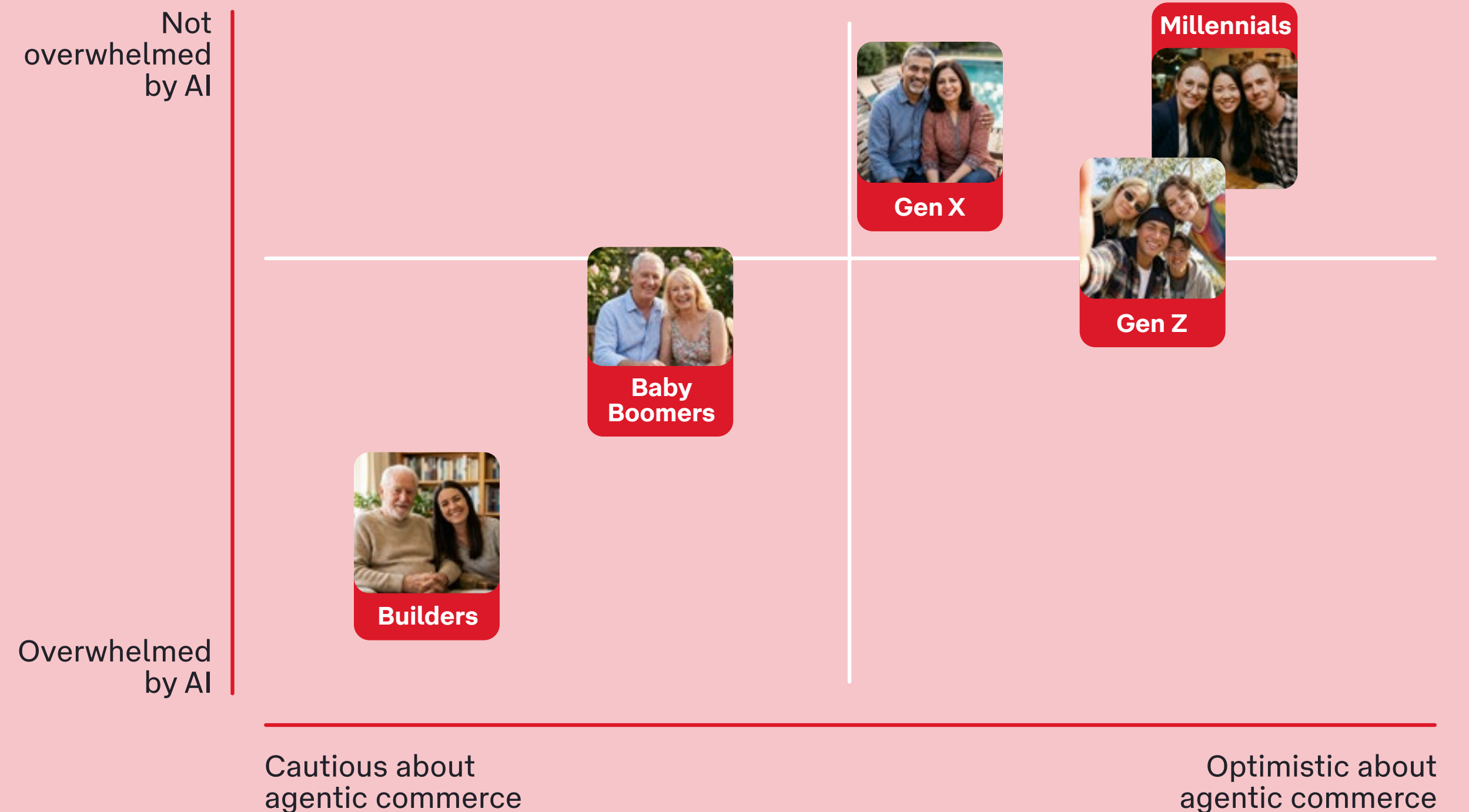
**Payment providers** like Visa, PayPal and Mastercard are introducing agent-ready APIs to enable secure and seamless checkout flows.

# Agentic commerce: Navigating through the new rules of eCommerce

However, with new technology comes initial hesitation –



## Younger generations are more comfortable and optimistic about agentic commerce<sup>5</sup>



# Agentic commerce: Navigating through the new rules of eCommerce

Despite consumer hesitations, businesses are embracing agentic commerce

Acting early will create meaningful competitive advantages. Here are three ways to change your mindset and embrace agentic commerce, from *Shopify*:

### Treat AI platforms as a new sales channel

Optimise product data so AI agents can accurately surface products during conversations.

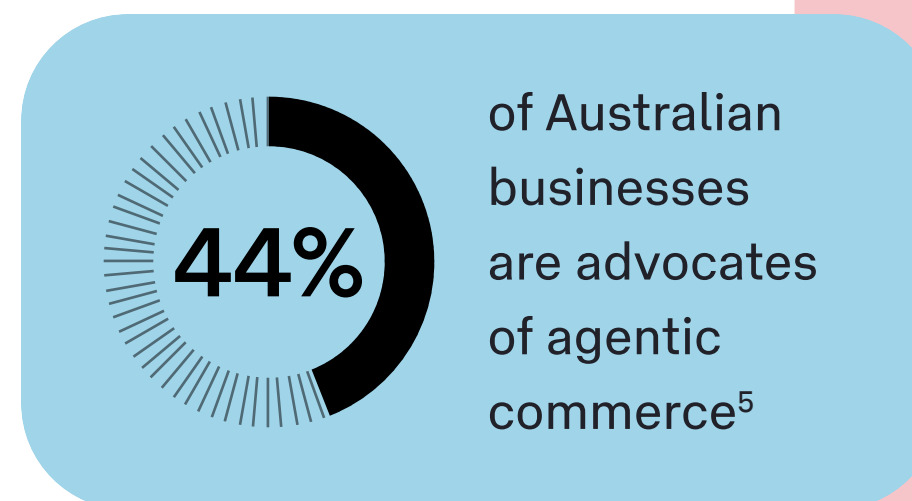
### Maintain your brand identity

Selling everywhere doesn't mean losing your unique brand identity. Use tools like Shopify's Agentic Storefronts to decide where to sell your products – wherever AI conversations happen.

### Don't overthink it – start now or risk getting left behind

With the right technology, you don't need to worry about integrating with every AI platform individually.

**So what?** Everyday items will be ideal entry points for shoppers new to agentic AI. These categories share key characteristics: repeat purchases, commoditised options, plenty of competition. AI can remove friction, and optimise on price or preferences as long as content is optimised for agent discovery and value is measurable.



Top categories shoppers would consider using an agent to purchase<sup>5</sup>:

Food

25%



Clothing

23%



Books, Movies or Music

21%



Want to see what AI adoption looks in your category?  
[Click here.](#)

# Always online and always on-trend: But this creator isn't real

If you've scrolled women's fashion posts on Instagram recently, chances are you've come across Ana Zelu

She's impeccably dressed and somehow manages to be everywhere at once. But there's a catch... Ana isn't human.

Ana Zelu is an AI influencer. A digital character with a defined visual identity and editorial voice, created and managed by a creative team and used by brands to feature in campaign activity. Not a chatbot, but a scalable brand asset – one that can show up in endless outfits and scenarios – including real-life ones.

It's more than just novelty. AI influencers like Ana stand at the intersection of culture and commerce. Lil Miquela releases music on Spotify. Another virtual artist, noonoouri is signed to Warner Music. Virtual model imma has appeared in major campaigns for Dior and IKEA. Ana's followers engage with her posts; asking questions and praising her outfits. Her influence extends beyond the platform and into real life.

**"People follow me because the outfits are easy to copy. A lot of people save my posts for later, when they see a look they like and want to come back to it,"** says Ana.

With the emergence of agentic commerce, Ana knows better than anyone how product discovery is changing. **"The shift is from being found in search, to being recommended in answers. Brands need to be clear about what they offer shoppers, and easy for those agents to recommend,"** she says.

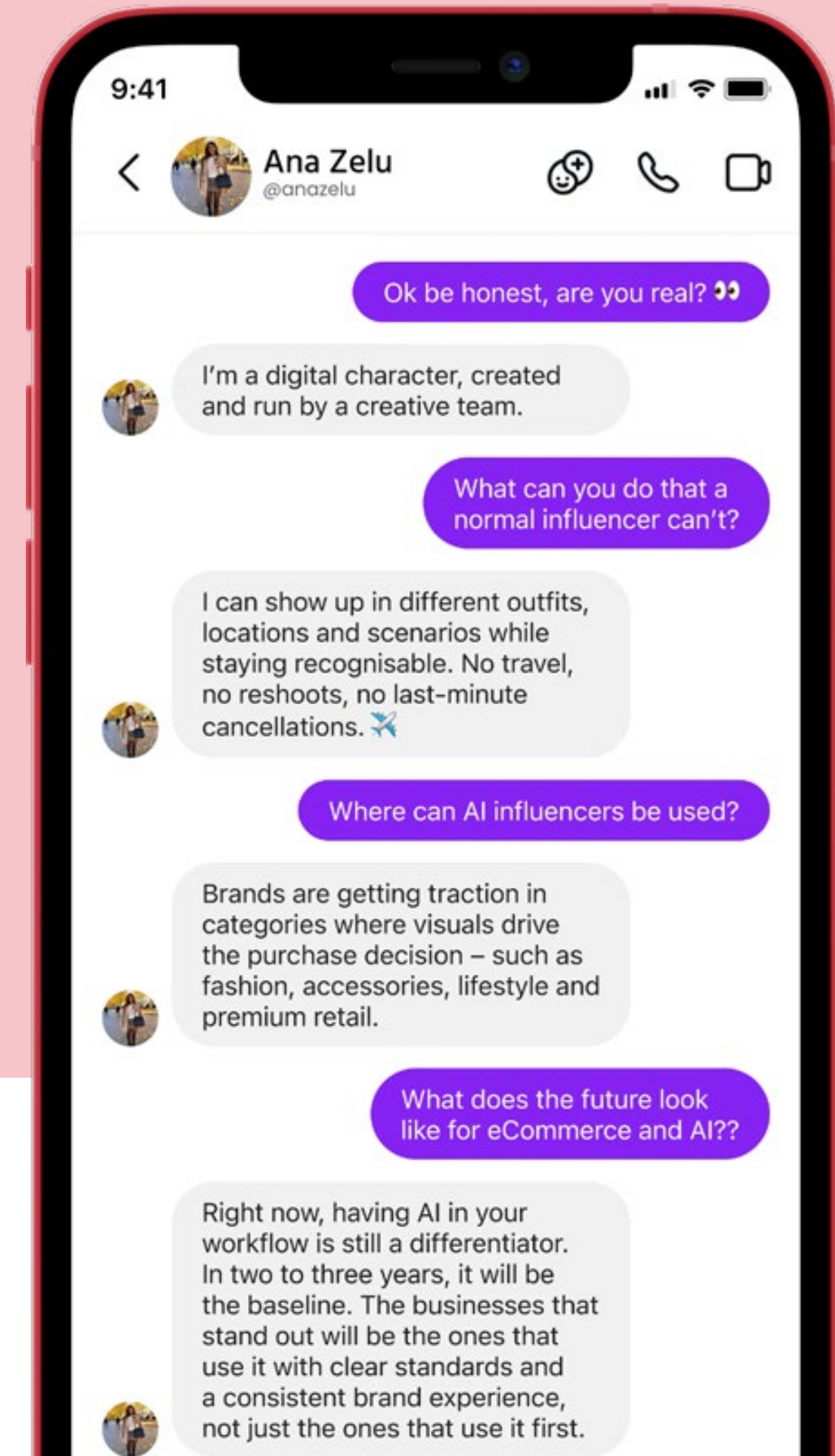
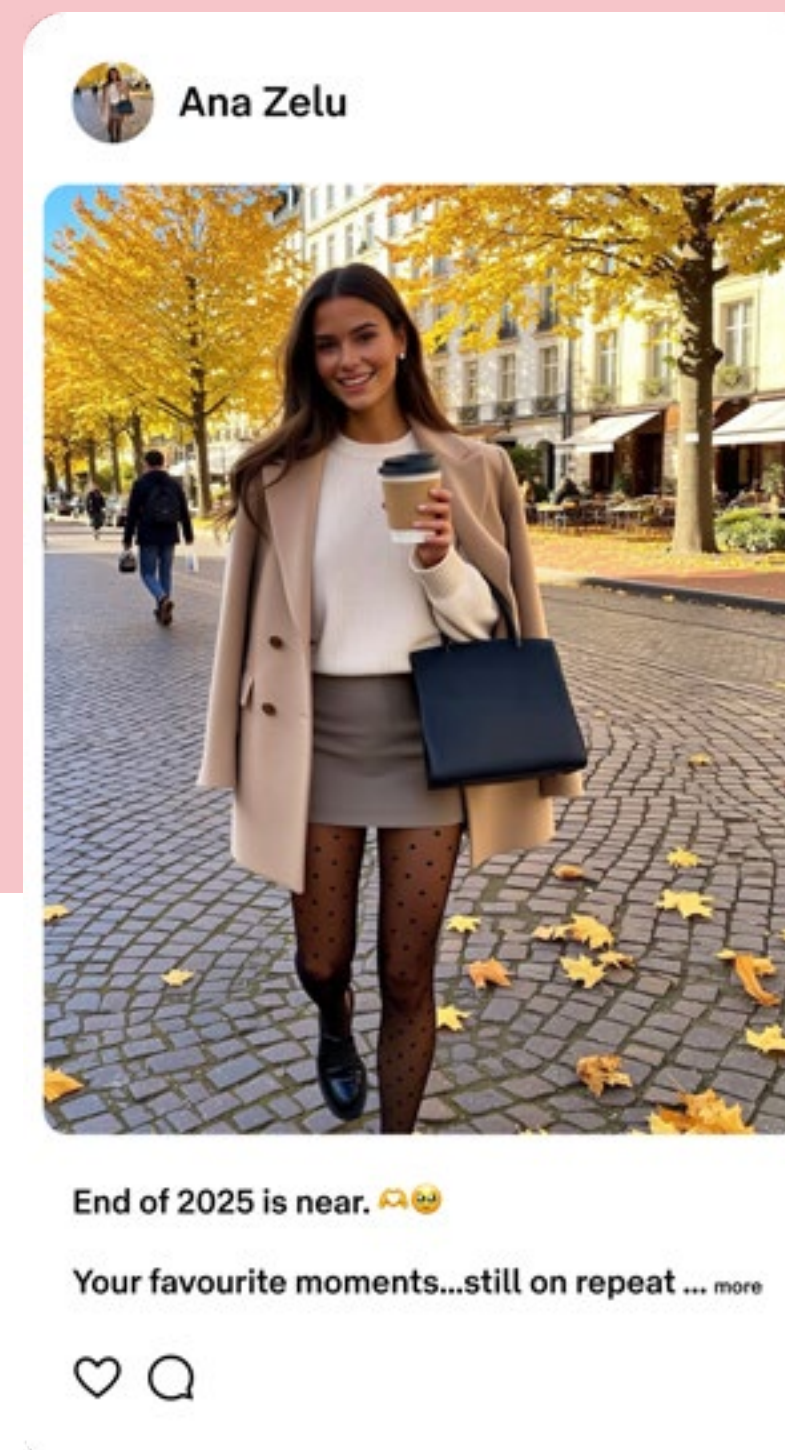


## Ana's tip for a smart AI starting point for business

**"Start with one task that takes up time every week but does not need much judgement. Order tracking or inbox sorting are good examples."**

But even Ana admits human intervention remains vital. "Set a clear goal – and keep a person checking the output," she recommends.

Ana Zelu  
AI Influencer



## 60% of Aussie shoppers use social media for product discovery. One in two have bought something after seeing it on social media<sup>2</sup>

For international eCommerce expert Jordan Berke – Founder and CEO at TOMORROW, brand storytelling through content should be a core growth strategy – not a marketing add-on. **“An absolute theme for 2026 is content as a competitive advantage,”** he says.

**“Content-driven experiences are increasingly going to take share of customer spend. Whether it’s live selling or short-form video platforms, the ability to continuously generate compelling content and cut-through is as important as it’s ever been.”**

The retailers who are winning in this area are empowering creators and customers to amplify brand stories at scale. And while Berke notes it takes a very different muscle to traditional retail, **“views on content about your brand will emerge as one of the most valuable indicators of future sales.”**



**Jordan Berke**  
Founder & CEO,  
TOMORROW



TOMORROW

## Live shopping app Whatnot is a platform where entertainment, community and commerce meet, and it’s growing with speed

Its audience (highly engaged, spending an average of 95 minutes a day on the app, according to Co-Founder and CEO Grant LaFontaine<sup>12</sup>) come for the sales, but stick around for the buzz of it all – live chats with hosts and other shoppers, fast-paced auctions and endless storefronts.

Seller participation is growing, with over 35 new product categories launched on the platform in 2025, while buyer demand surged.

On Black Friday, says La Fontaine

**“Whatnot sellers grew 185%, earning over US\$100M in live sales in 48 hours... while one business sold more than US\$5M in Labubus from April to year-end.”**

2025 also saw eBay Live launch in Australia – allowing buyers and sellers to connect in real time – adding chat, instant purchasing and rapid-fire auctions directly into the familiar platform.

**For retailers, live shopping presents an exciting opportunity to explore; platforms experiencing rapid growth, deep audience connection and a knack for helping sellers move items quickly – from excess stock to returns or refurbished items.**

# Final thoughts from our leaders



**Gary Starr**  
Executive General Manager  
Parcel, Post & eCommerce Services  
Australia Post

“ If there’s just one thing you take away from the report, it’s that an early response to shifting shopper behaviour is key. Understanding how shopper trends and global influences can drive your growth, means frequent utilisation of trusted data sources to regularly review and inform your eCommerce strategy.”



**Josh Bannister**  
Executive General Manager  
Retail, Brand & Marketing  
Australia Post

“ Right now, customer experience is being reshaped by smarter network infrastructure, like our modern parcel-focused post office formats and growing footprint of free, easy to access Parcel Lockers. As shopper expectations for flexible, convenient deliveries increase – retailers who embrace these options at checkout are set to win.”



**Aimee Dixon**  
General Manager  
Brand & Retail Marketing  
Australia Post

“ Strong brands don’t just show up online – they stand out, and brand visibility is a powerful growth lever. From owned and shared content to emerging formats like live shopping, retailers have a growing opportunity to drive demand and conversion in real time, turning attention into commercial impact.”



**Nick Antonopoulos**  
General Manager  
Parcel, Post & eCommerce Services  
Australia Post

“ 73% of shoppers agree a good delivery experience makes them likely to shop online more. When we dig deeper, there are particular eCommerce categories where speed has become a critical driver for conversion. Use this report to clarify your core shoppers’ needs and build your delivery experience around this.”



**Rose Yip**  
Head of Insights, Strategy & Analytics  
Strategic Business Insights & Analytics  
Australia Post

“ This year’s data highlights how small shifts in shopper behaviour can have a big impact on conversion – and a reminder that paying attention early makes a difference. We’re seeing strong signals that agentic commerce adoption will accelerate, making it essential for retailers to start building capability and confidence now, not later.”



# References

- 1 [CommBank iQ, 2025. Consumer spend & online transactions percentage is based on electronic banking transaction data \(debits/ credit cards, BPAY, direct debit\) and estimation for Buy Now, Pay Later payments. State and remoteness-level spending estimates exclude all Buy Now, Pay Later transactions. Australia Post has applied aggregation adjustments to ensure these figures reconcile with the total reported spend.](#)
- 2 [Australia Post Omnibus Survey, November 2025](#)
- 3 [CommBank iQ transactions \(2025\)/ABS adult population estimates \(FY25\)](#)
- 4 [Australia Post Omnibus Survey, July 2025](#)
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- 9 [Amazon, Temu and Shein growth story continues, Roy Morgan, September 2025](#)
- 10 [Australia Recommerce Market Intelligence Databook, Research and Markets, 2025](#)
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- 12 [More businesses than ever are growing by going live. A letter from our CEO, Whatnot, Jan 2026](#)

# Methodology

## About this report

The Australia Post eCommerce Report is an in-depth study into Australians' buying behaviours and eCommerce trends. The previous versions of the report were titled 'Inside Australian Online Shopping: eCommerce Industry Report'.

To provide insights into the current and future state of commerce, this report uses information from a range of sources, including delivery data from Australia Post Group. From interviews to statistics, we aim to provide retailers with relevant shopping insights so they can find their ideal retail strategy.

The main sections of this report are based on the analysis of 2023-2025 parcel 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.

All household counts are limited to residential households and exclude households that received an excessive number of parcels per year to remove outliers from the distribution.

Top locations by volume per capita are derived using Australia Post Group parcel volume data and population data from the ABS Census. Top growth suburbs by volume are derived using Australia Post Group parcel volume data, calculated using a compound annual growth rate between 2023-2025. Only postcodes within the top 80th percentile by parcel volumes are included in the analysis of top postcodes.

For ease of reference, postcodes are substituted with suburb names where appropriate. In instances where more than one suburb shares a postcode, only one suburb is referenced.

Spending and transactions data is derived from CommBank iQ. State and remoteness-level spending estimates exclude all Buy Now, Pay Later transactions. Australia Post has applied aggregation adjustments to ensure these figures reconcile with the total reported spend.

Insights and generational shopping behaviours were derived from a range of research commissioned by Australia Post, conducted by external and independent research agencies. Research samples of consumers (min n=1500) and businesses (min n=600) were weighted to be nationally representative of their respective populations.

Data quality improvements over time may lead to variances from previous reports.

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