About this paper

This first edition of Inside Australian Online Shopping primarily draws on Australia Post data for physical goods bought online, and delivered to Australian residents. The insights are based on:

- A subset of Australia Post deliveries, undertaken between January 2014 and December 2015, across our Australia-wide network of 11.4 million delivery points, aggregated to postcode level.
- Online retail environment data (including online retail goods spending, domestic and international trends), as provided to Australia Post by Quantium. The research was derived from the NAB Online Retail Sales Index (NORSI), which is based on up to 2 million non-cash transactions per day, scaled up to replicate the broad economy.

Foreword

Message from Managing Director & Group CEO

Message from GM eCommerce Platforms & Digital

Executive Summary

eCommerce Overview

The state of Australian eCommerce

Key drivers of online shopping growth

What are Australians buying?

Industry Overview

Department & Variety Stores

Fashion

Overview 2.02

NSW/ACT 2.03

VIC/TAS 2.07

QLD 2.11

WA/SA/NT 2.14

Health & Beauty

Overview 3.02

NSW/ACT 3.03

VIC/TAS 3.07

QLD 3.11

WA/SA/NT 3.14

Homewares & Appliances

Overview 4.02

NSW/ACT 4.03

VIC/TAS 4.07

QLD 4.11

WA/SA/NT 4.14

Media

Overview 5.02

NSW/ACT 5.03

VIC/TAS 5.07

QLD 5.11

WA/SA/NT 5.14

Specialty Food & Liquor

Overview 6.02

NSW/ACT 6.03

VIC/TAS 6.07

QLD 6.11

WA/SA/NT 6.14

Seasonal Overview

Christmas

Games & Toys

Recreational Goods

Fashion

Specialty Food & Liquor

Methodology & references
Welcome to our first edition of Inside Australian Online Shopping, Australia Post’s in-depth paper on the online shopping and delivery trends transpiring in suburban and regional Australia.

While Australians are, traditionally, predisposed to the familiarity of buying goods at their local high street or shopping centre, digital technology continues to transform the way we live, learn and work – most of us now literally have a world of information, products and services at our fingertips. This increased connectivity and, with it, our elevated expectations around convenience, value and choice has driven more consumers to shop online. Today, we have a thriving local eCommerce sector that is triggering opportunity and innovation for Australian businesses of all sizes.

As Australia’s leading parcels and logistics network, together, Australia Post and StarTrack continue to champion Australian business. Each year we deliver more than 4 billion items to 11.4 million addresses across the nation. And we support online retailers with reliable eCommerce and supply chain solutions so that your customers can enjoy a seamless online shopping experience.

As part of our commitment to improving our parcel and eCommerce solutions in response to your needs, we have drawn from our vast, nationwide processing and delivery network to deliver the data-driven insights contained in this paper. It paints a comprehensive picture of where Australians are shopping online, and the areas that are growing the fastest, to help you anticipate potential growth opportunities and optimise your position in the market.

We are delighted to be able to share these insights with you, and we hope that you’re able to apply them to the benefit of your customers – and your business.

Ahmed Fahour
Managing Director & Group CEO
As the Australian eCommerce market reaches greater levels of maturity, online retailers are searching for their competitive edge with new ways to grow. One way to increase your chances of success is to analyse trends and predict where new opportunities could take you.

Our paper brings together category-specific trends, growth patterns and insights on Australia's favourite products to buy online, where the nation's top online shoppers live, and where we predict the next growth areas to be. For our partners - both established and emerging online businesses - it's a chance to explore Australian online shopping trends in depth, and to uncover future opportunities for growth.

As you might expect, our findings indicated population density, limited bricks-and-mortar retail access and high internet usage contributed to Australians' predisposition to buying online. But aside from revealing Australia's most active online shopping suburbs, we've also observed encouraging trends by deep-diving into these locations to better understand their residents' characteristics and what they tend to buy.

For example, online shopping in regional Australia grew more than 8% last year. Growth in regional New South Wales and Victoria for Media purchases outstripped the national average.

Regional online shopping grew by more than 8% last year. Growth in regional New South Wales and Victoria for Media purchases outstripped the national average.

Armed with this in-depth knowledge of precisely what, where and why Australians are buying online, you can unlock these eCommerce insights, refocus your next growth and acquisition strategy and target audiences more likely to become loyal customers.

If you'd like to learn more about how to take advantage of these learnings, please get in touch with our team at acquire@auspost.com.au

Ben Franzi
General Manager, eCommerce Platforms & Digital
What are Australians buying online? And where is online shopping growing the fastest?

Department and variety store as well as fashion items make up more than half of all online purchases in Australia. These sectors represent a 32% and 26% share of the market, and while both categories have experienced rapid, double to triple-figure percentage growth in recent years, growth has stabilised over the past year.

Growth was flat for Department & Variety Stores, and up 16% in Fashion. While the latest growth figures may seem discouraging, compared to previous years, the slowing growth of these two industries indicates both have reached a level of maturity.

Despite talk of a recession and declining consumer sentiment, our findings suggest consumers are increasingly finding comfort in discretionary and “feel-good” items. This is highlighted by the exceptional growth in the Health & Beauty and Media categories, which increased by 50% and 40% respectively in the last 12 months.

Consumers are finding comfort in discretionary and “feel-good” items, highlighted by exceptional growth in Health and beauty and Media.
Homewares & Appliances, and Specialty Food & Liquor have also emerged as two categories on the verge of exponential growth. Aside from the popularity of home renovation and cooking shows, we believe this acceleration will be stimulated by the increasing sophistication and abundance of established retailers. This includes small and large businesses that have created strong brand loyalty and product familiarity through greater service, delivery and return options.

As you might expect, the bulk of online shopping takes place in densely populated areas. However, with growth up by more than 8% in the last year, our findings show that regional residents are shifting towards online shopping.

Media is the fastest-growing category in regional areas. In fact, the data shows that regional residents are adopting online shopping for media purchases at the same pace as their city-based counterparts. When we examine the data by state, growth in regional New South Wales and Victoria has outstripped the national average.

Similarly, in the Specialty Food & Liquor category, regional growth exceeded that of metropolitan by 3%, with regional New South Wales, Victoria and South Australia the top contributors.
The state of Australian eCommerce

Online retail continues to evolve and mature, creating great opportunities for Australian businesses.

While Australians have traditionally been accustomed to the familiarity of buying goods in a bricks-and-mortar store, the trend for growth is clear. In Christmas 2015 – the busiest time of the year for online shopping and deliveries – 53% of Australians bought online¹, highlighting the strong potential for growth in the Australian eCommerce market.

Growth in online spending on physical goods exceeded bricks-and-mortar by 1.8%.

As Australia’s fondness for online shopping continues to grow, and previously untapped sections of the Australian population become more comfortable with online shopping, the shift towards digital will accelerate.

Australians spent $19 billion online in 2015 – which was 12% higher than the previous year² – with digital services contributing around a quarter of that amount³. In the same period, online spending on physical goods increased by approximately 6%³, compared to bricks-and-mortar spend which only increased by 4.2%⁴.

---

¹ Australia Post Consumer Parcel Receivers Survey n=2,000.
² All Online Retail statistics are sourced from the NAB Online Retail Sales Index (NORSI).
³ Online Physical Goods Index is a sub-set of NORSI. NORSI is sourced from NAB and Market Blueprint. NAB and Market Blueprint take no responsibility for the accuracy of the information shown.
⁴ Traditional retail sales data and statistics in Spotlight sections are sourced from the Australian Bureau of Statistics (ABS).
Despite popular opinion, domestic purchases have always made up the vast majority of online spending in Australia. At the end of last year, domestic goods represented 73% of the market. As the Australian dollar weakened in December 2015, domestic online spending on physical goods grew 6% year-on-year, while international declined by 2%.

The eastern seaboard accounts for the bulk of online spending in Australia – three quarters of all purchases are made in New South Wales, Victoria or Queensland. Last year New South Wales was the fastest-growing state, month-on-month. On a per-capita basis, ACT residents spent the most online. Victoria had the lowest per-capita spend, possibly due to the breadth of bricks-and-mortar shopping options there.

However, some international trends are catching on here. Big-name international brands and overseas shopping days like Black Friday and Cyber Monday in the United States and Singles’ Day in China are receiving more local recognition, further embedding online shopping into the Australian psyche.

While some newly established businesses will naturally migrate to a purely online presence, others may appear better suited to bricks-and-mortar. We believe the challenge for many brands will be to effectively combine these channels into a considered retail experience, tailored to their customers.

2 All Online Retail statistics are sourced from the NAB Online Retail Sales Index (NORSI).
3 Online Physical Goods Index is a sub-set of NORSI. NORSI is sourced from NAB and Market Blueprint. NAB and Market Blueprint take no responsibility for the accuracy of the information shown.
Key drivers of online shopping growth

Several factors can signify the popularity of online shopping. We’ve highlighted the following key drivers to help explain growth in geographic locations:

1. Population

There is a clear correlation between high concentrations of people (particularly those with an income-earning capacity) and spend, and therefore online purchases. So wherever we see a new housing development, a re-zoning, an influx of young families, or a new economic initiative – all factors that lead to population growth – we’re likely to see online shopping growth as well.

2. Demographic changes

Younger Australians and families are, on average, more frequent online shoppers than the general population. Locations with these characteristics therefore tend to appear on top of the listings for online purchasing.

3. Proximity

Put simply, if you’re further away from shops, you’ll be more likely to buy online. It’s why some regional areas, which don’t enjoy the range of shopping options of their metropolitan cousins, are some of the biggest buyers of online goods on a per-household basis.

4. Connectivity

Improved digital access means Australians today are more connected than ever before – and therefore more able to buy online wherever they are, whenever they want. We expect to see sustained growth in online shopping particularly as mobile devices continue to become entrenched in our lives.
What are Australians buying?

Department and variety store items are the most popular online purchases in Australia, accounting for one-third of all goods bought online, followed by fashion items which account for a 26% share of the market.

Health & Beauty and Media are the fastest-growing categories, up an impressive 50% and 40% respectively. Homewares & Appliances trails with 20% growth, followed closely by Fashion, up 16%.
Inside Australian Online Shopping

Department & Variety Stores

Overview
NSW/ACT
VIC/TAS
QLD
WA/SA/NT

2016 eCommerce Industry Paper
Department & Variety Stores overview

Department and variety store items are the number one choice for goods bought online in Australia, accounting for one-third of all purchases. When compared to other online categories, growth is flat. That said, future growth is centred around New South Wales and Victoria which are experiencing relatively strong population growth.

**Top buying locations***
- Liverpool NSW
- Point Cook VIC
- Toowoomba QLD

**Top buyers by household***
- Clyde North VIC
- Onslow WA
- Currie TAS

**Top growth locations***
- Mount Duneed VIC
- Ardrossan SA
- Haberfield NSW

**Future growth***
- Green Valley NSW
- South Morang VIC
- Panania NSW

* top locations for online purchases
* top locations for online purchases (parcels) per household
* top locations by year-on-year growth in online purchases

* our predictions for future growth
Department & Variety Stores
NSW/ACT

Top 5 buying locations in NSW

Liverpool ranks first nationally for online purchases in the Department & Variety Stores category.

Spotlight:
Liverpool

Liverpool is one of the largest growth spots in Western Sydney, and an area that’s undergoing substantial demographic change. New housing developments have led to an influx of younger families – 53.6% of households there have children (compared with the national average of 44.6%). With nine Post Offices and two 24/7 Parcel Locker locations, it’s the number one area for department and variety store purchases in NSW/ACT.
Department & Variety Stores
NSW/ACT

**Top 5 buying locations in ACT**

Dunlop ranks first in the ACT for online purchases in the Department & Variety stores category.

**Spotlight:**

**Dunlop**

Dunlop is the ACT’s strongest location for department and variety store online purchases, driven by the relative affluence of its residents. The median weekly household income in Dunlop stands at 44% above the national average.
Department & Variety Stores
NSW/ACT

Top eCommerce buyers by household location

The Ponds is the number one location for purchases per household in NSW – recording four times above the state average.

The Ponds
NSW 2769

Spotlight:
The Ponds

The Ponds, in the growth corridor of north-west NSW, was described in the 2011 Census as the ‘most advantaged’ suburb of Sydney, based on 25 variables such as internet access and income. It topped the list of department and variety store purchases in NSW, with an average of five parcels per household.
Department & Variety Stores
NSW/ACT

Fastest-growing locations

New South Wales was the strongest performing state for the Department & Variety stores category, with modest growth of 2.2% year-on-year.

Online purchasing trends in the ACT followed NSW growth trends for department and variety store purchases, flat at 1.5% year-on-year.

Future growth

Green Valley, West Hoxton and Panania are our hot picks for growth in online shopping in coming years. They all lie in and around central Liverpool, currently the number one region for department and variety store purchases in NSW.

With lower than average median ages (32 compared with the national median of 37), strong population growth, and a higher than average proliferation of families, these areas have all the ingredients for strong online purchasing growth.

Spotlight: Nelson Bay

Nelson Bay, on the NSW Central Coast, has a higher than average proportion of homes owned outright (an indicator for an increased propensity to spend online). Over 40% of Nelson Bay residents own their home outright compared with the national average of 32.1%.
Department & Variety Stores
VIC/TAS

Top 5 buying locations in VIC

Point Cook ranks second nationally for online purchases in the Department & Variety Stores category.

Spotlight:
Point Cook

Point Cook is one of the fastest-growing areas in the country, and the number one postcode for department and variety store purchases in Victoria. Spurred on by substantial new developments, families have been flocking to the outer-western Melbourne suburb, creating a boom in online shopping.

Nearby Hoppers Crossing, which shares many of Point Cook’s demographic characteristics, comes a close second in Victoria.
Department & Variety Stores
VIC/TAS

Top 3 buying locations in TAS

Launceston ranks first in Tasmania for online purchases in the Department & Variety Stores category.

Launceston is the second largest city in Tasmania, but pipped Hobart for the number one spot in department and variety store online purchases. It is home to 47,234 residents and the 127 year-old Launceston Post Office – an iconic architectural site, located a stone's throw from the city's major bricks-and-mortar department stores.
Department & Variety Stores
VIC/TAS

Top eCommerce buyers by household location

Clyde North was the number one location for purchases per household in Victoria, recording volumes five times above the state average.

Clyde North
VIC 3978

Spotlight:
Clyde North

Clyde North, on Melbourne's south-eastern fringe, tops the state in department and variety store purchases per household, with an average of seven parcels per household. As further housing developments are established in the region, we expect growth here to continue.
**Department & Variety Stores**

**VIC/TAS**

### Fastest-growing locations

Victoria experienced subdued growth in online purchases from department and variety stores overall, however there were pockets of growth across the state.

- **97.7%** Mount Duneed VIC 3217
- **47.2%** Lower Plenty VIC 3093
- **37.7%** Nagambie VIC 3608
- **30%** Apollo Bay VIC 3233
- **15%** Taroona TAS 7053
- **13%** Sandy Bay TAS 7005

**Spotlight: Mount Duneed**

Mount Duneed, in the seaside town of Geelong, is a thriving community for families, with seven beaches within 15 minutes drive. The Victorian Government’s Greater Geelong Planning Scheme, first approved in 2010, has injected infrastructure funds into the region, driving population growth in the area.

---

**Future growth**

South Morang, 23km north of the Melbourne CBD, is our top pick for future online shopping growth. Once a part of the Victorian countryside, it’s now very much a suburban centre, with new estates and a new train station linking to the rest of the Melbourne network.

We see Legana, near Launceston, as the big mover in Tasmania. It’s a small town, but also the fastest-growing area in the state. We predict solid online shopping growth here.
Department & Variety Stores QLD

Top 5 buying locations in QLD

Toowoomba ranks third nationally for online purchases in the Department & Variety stores category.

Spotlight: Toowoomba

Toowoomba is the number one area for online department and variety store purchases in Queensland. It is also Australia’s second most populous inland city (the 16th largest city overall), and home to over 102,244 residents. Its population includes a high proportion of residents with both parents born in Australia (76.3% compared to 53.7% nationally).
Top eCommerce buyers by household location

Julia Creek was the number one location for purchases per household in Queensland, recording volumes three times above the state average.

Spotlight:

Julia Creek

Julia Creek, 650km west of Townsville and 250km east of Mt Isa, is in the heart of outback Australia. While access to bricks-and-mortar shopping is limited, access to the internet is not. Households here make on average four department and variety store purchases online each year.
Department & Variety Stores
QLD

Fastest-growing locations

Queensland experienced subdued growth in online purchases from department and variety stores overall, however there were pockets of growth across the state.

Metro

<table>
<thead>
<tr>
<th>Location</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mackenzie, QLD 4156</td>
<td>30.1%</td>
</tr>
<tr>
<td>Annerley, QLD 4103</td>
<td>20.2%</td>
</tr>
</tbody>
</table>

Regional

<table>
<thead>
<tr>
<th>Location</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allora, QLD 4362</td>
<td>42.6%</td>
</tr>
<tr>
<td>Texas, QLD 4385</td>
<td>24.1%</td>
</tr>
</tbody>
</table>

Spotlight: Allora

Allora is one of the fastest-growing areas for online shopping in Queensland. What's driving the trend? A high proportion of families is one factor – 74.5% of households there are families, compared with the national average of 71.5%. There's also a higher percentage of homes owned outright in Allora (46.4% compared with the national average of 32.1%) – another determinate of online shopping habits.

Future growth

About a 40 minute drive from the centre of Brisbane, Redbank Plains was once known for its sugar cane and bee keeping. Now it's a hotspot for new housing development. As families continue to flock to the area, we see Redbank Plains as a strong growth centre for online purchases.
Department & Variety Stores
WA/SA/NT

Top 5 buying locations in WA

Wanneroo ranks ninth nationally and first in Western Australia for online purchases in the Department & Variety Stores category.

Spotlight:
Wanneroo

The City of Wanneroo is one of the fastest-growing local government areas in the country, welcoming 8,000 new residents each year. It’s welcoming a lot of parcels too – topping the list of department and variety store purchases in Western Australia, South Australia and the Northern Territory.
**Department & Variety Stores**

**WA/SA/NT**

**Top 3 buying locations in SA**

Happy Valley ranks first in South Australia for online purchases in the Department & Variety Stores category.

**Spotlight:**

**Happy Valley**

Happy Valley, located around 20km south of Adelaide's CBD, is a popular area for young families, 49.2% compared to the national average of 44.6%. A large proportion of the occupied dwellings here are either owned outright or with a mortgage, 83.2% compared to Australian average of 67%.
Department & Variety Stores
WA/SA/NT

Top eCommerce buyers by household location

Onslow is the number one location for purchases per household in Western Australia – recording volumes four times above the state average.

Spotlight:
Onslow

The small town of Onslow has enjoyed unprecedented levels of investment in recent years, thanks to Chevron’s $30 billion Wheatstone LNG project. The flood of workers into the area has seen rents soar from $200 to as much as $2,500 a week, and a huge spike in online shopping too. Households here bought on average six department and variety store items each last year.
Spotlight: City Beach

City Beach, north of Cottesloe in Perth, is one of the fastest-growing areas for department and variety store purchases. It’s part of the $1 million property club in Perth, and has a higher-than-average median weekly household income – $2,576 versus the national average of $1,234.
Fashion has firmed up as the nation's second most popular category for online purchases. After an extraordinary 145% increase in 2014, the category solidified its growth with a further 16% uplift last year. However, there hasn't been an even spread in growth across the country. Metropolitan areas grew 18% last year, compared to just 10% in regional areas. Growth has been particularly strong in Melbourne and Sydney, both up by 22% respectively.
Fashion overview

What's driving online fashion purchases? Fashionistas might not want to admit it, but the number one factor is value for money, followed by ease and convenience, and variety.

Drivers of eCommerce fashion

Value for money
Ease & convenience
Variety
Delivery
Returns

Those who do buy fashion online tend to become long-term converts. A quarter of all online fashion shoppers claim to browse daily, while half browse at least once every second day.

5 Australia Post independent qualitative research undertaken by RealityCheck research, March 2015
Fashion
NSW/ACT

Top 5 buying locations in NSW

Surry Hills ranks first in the country for online fashion purchases.

Spotlight:
Surry Hills

Not too long ago, Surry Hills – in Sydney’s inner east – was a light industrial area, known for accommodating garment factories. These sites have now been replaced with cafés and bars, with cashed-up hipsters frequenting the area instead of garment workers. Nevertheless, it seems fitting that Surry Hills is first for fashion, retaining its historical links.

Wagga Wagga appears in the top five fashion areas, despite its distance from Sydney. Its sizeable population (53,972 residents) is the driving factor with more than twice the population of Surry Hills.
**Fashion**

**NSW/ACT**

**Top 5 buying locations in ACT**

Dunlop ranks first in the ACT for buying fashion online.

Spotlight:

**Dunlop**

Dunlop is the ACT's top spot for fashion, driven by the relative affluence of its residents. The median weekly household income in Dunlop stands at 44% above the national average and with lower than average median ages (34 versus a national median of 37), Dunlop has the ingredients for strong online purchasing habits.
Fashion
NSW/ACT

Top eCommerce buyers by household location

The Ponds is the number one location for fashion purchases per household in NSW – recording three times above the state average.

<table>
<thead>
<tr>
<th>NSW/ACT</th>
<th>NSW parcels per household</th>
<th>ACT parcels per household</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Ponds</td>
<td>4.2</td>
<td></td>
</tr>
<tr>
<td>Rossmore/ Catherine Field</td>
<td>2.9</td>
<td></td>
</tr>
<tr>
<td>Greenway</td>
<td>2.7</td>
<td></td>
</tr>
<tr>
<td>Deakin</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>Amaroo</td>
<td>2.1</td>
<td></td>
</tr>
</tbody>
</table>

Spotlight:
The Ponds

Households in the The Ponds, in the growth corridor of north-west NSW, make more fashion purchases than any other area in the state. Rossmore and Catherine Field, in Sydney’s south-west, are a close second.
**Fashion**

**NSW/ACT**

**Fastest-growing locations**

New South Wales was the strongest performing state for Fashion, with purchases up 20.6% year-on-year.

**Metro**
- Haberfield
  - NSW 2045
  - 81.2%
- West Wallsend
  - NSW 2286
  - 43.6%
- Belfield
  - NSW 2191
  - 42.4%

**Regional**
- Lightning Ridge
  - NSW 2834
  - 97.1%
- Condobolin
  - NSW 2877
  - 51.0%

**ACT**
- O’Connor
  - ACT 2602
  - 8.8%
- Monash
  - ACT 2904
  - 4.7%

**Spotlight: West Wallsend**

The online shopping habits of residents in West Wallsend, a mining area just out of Newcastle, haven’t been affected by the resources downturn. The area’s online fashion purchases grew 43.6% year-on-year.

**Future growth**

Engadine, 33km south of Sydney’s CBD, has been touted by real estate agents as the suburb to watch in 2016. It has also piqued our interest, earning our top pick for future online shopping growth.

In the ACT, we predict large increases in Gungahlin’s online purchases in coming years. It’s a relatively young city, largely populated by families. Families with children are well above the national average (52.6% compared with 44.6%), while the median age of the population is 29; well below the Australian average of 37.
Top 5 buying locations in VIC

Point Cook ranks fourth nationally and first in Victoria for buying fashion online.

Spotlight:

Richmond

Richmond – in Melbourne's inner east – was once home to a booming fashion precinct. While bricks-and-mortar retail vacancies in the area have risen in recent years, we see Richmond as a fashion hub for other reasons; it's now second only to Point Cook for online fashion purchases in Victoria.
Fashion
VIC/TAS

Top 5 buying locations in TAS
Launceston ranks first in Tasmania for online fashion purchases.

Spotlight:
Howrah
Howrah is third for fashion in Tasmania, only behind Launceston and Devonport. The higher purchases could be due to the area's larger proportion of households without children (42.8% compared with the national average of 37.8%) and higher concentration of dwellings that are owned outright (39.5% compared to 32.1% nationally), factors that lend themselves to higher disposable incomes.
## Fashion
### VIC/TAS

<table>
<thead>
<tr>
<th>Location</th>
<th>VIC parcels per household</th>
<th>TAS parcels per household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parkville</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td>Officer</td>
<td>3.4</td>
<td></td>
</tr>
<tr>
<td>Abbotsford</td>
<td>3.4</td>
<td></td>
</tr>
<tr>
<td>Currie</td>
<td>2.3</td>
<td></td>
</tr>
<tr>
<td>Lauderdale</td>
<td>1.5</td>
<td></td>
</tr>
<tr>
<td>(King Island)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Top eCommerce buyers by household location

Parkville was third for fashion purchases per household in Victoria, behind Clyde North and Mount Duneed, recording volumes three times above the state average.

### Spotlight: Parkville

Parkville, located 3km away from Melbourne's CBD, is a major education precinct and home to the University of Melbourne. Despite housing only 4,673 residents, Parkville’s population is dominated by students – big buyers of online fashion – putting it high on our list for Fashion.

### Spotlight: King Island

King Island residents are the biggest purchasers (per household) of online fashion in Tasmania. Located off the state's north-western tip, King Island’s relative remoteness and distance from quality retail options has been a major driver of online shopping.
**Fashion VIC/TAS**

**Fastest-growing locations**

Victoria was the second strongest performing state for the Fashion category, with purchases up 20% year-on-year.

- **VIC**
  - Mount Duneed VIC 3217: 117.6%
  - Brunswick East VIC 3057: 42.3%
  - Abbotsford VIC 3067: 41.3%
  - South Yarra VIC 3141: 39.1%
  - Fitzroy VIC 3065: 38%

- **TAS**
  - Beaconsfield TAS 7270: 28.1%
  - Kings Meadows TAS 7249: 25.7%
  - Taroona TAS 7053: 24.4%

**Spotlight: Melbourne’s inner north**

Melbourne’s inner north has become the city’s trend epicentre in recent years, giving rise to a number of new apartment builds to keep up with housing demand. The enclave is also home to four out of the five top growth suburbs for online fashion – Brunswick East, Abbotsford, Collingwood, and Fitzroy.

**Future growth**

Brunswick is a multicultural hub in Melbourne’s north with a rising population of younger residents. It’s also the fastest-growing suburb for online fashion buys, making it a safe bet for future growth. We also predict big things further afield, in Caroline Springs and Craigieburn, family areas in Melbourne’s outer west and north respectively.

In Tasmania, we see Bridgewater as a strong growth prospect for fashion sales. It also comprises a young population, with one of the highest rates of children and youths in the state.
Fashion
QLD

Top 5 buying locations in QLD

Toowoomba ranks third in Australia and first in Queensland for fashion purchases online.

Spotlight:
Toowoomba & Mackay

None of Brisbane's suburbs were listed as top online fashion areas in Queensland. Instead, regional cities led the way, with Toowoomba (to Brisbane's west) and Mackay (1,000km north of the CBD), seizing the state's top spots.

Toowoomba is Australia's second most populous inland city (the 16th largest city overall), and home to over 102,244 residents. Its population includes a high proportion of residents with both parents born in Australia (76.3% compared to 53.7% nationally).

Mackay is home to 79,544 residents. It has a median weekly household income 29% above the national median.
Darra was the number one location for purchases per household in Queensland, doubling the average state volume.
In most categories, single-person households and family households without children tend to buy less online than families with kids. However, this trend can be the opposite for fashion and potentially explains why Coolangatta is one of the fastest-growing postcodes in the category. Here, 58% of households comprise couples without children, compared with the national average of 37.8%.

North Lakes, in the Moreton Bay area north of Brisbane, is growing fast. Many traditional fashion retailers are setting up shop here, and residents’ increasing interest in fashion appears to be extending to online retail. The postcode is mostly made up of newly developed housing around the North Lakes Golf Course. The population here more than doubled to 19,381 between 2006 and 2011. North Lakes, is our pick as the place to watch in the Fashion space.
**Fashion**

**WA/SA/NT**

### Top 5 buying locations in WA

Wanneroo ranks 21st nationally and first in Western Australia for online fashion purchases.

**Spotlight:**

**Wanneroo**

Wanneroo, around 25km north of Perth’s city centre, is already the number one location for online fashion in Western Australia, but also one of the fastest-growing. New families migrating to the area have sparked a boom in online fashion purchases – the broader City of Wanneroo grew approximately 40% between 2006 and 2011.
Top 3 buying locations in SA

Happy Valley ranks first in South Australia for online fashion purchases.

Spotlight: Port Lincoln

Port Lincoln, Australia's 'seafood capital', is the third destination for fashion in South Australia. The suburb is reputed to have the most millionaires per capita in Australia, a claim somewhat supported by the area's median weekly household income, which is 15% higher than the national average.

Like other affluent neighbourhoods, Port Lincoln's higher incomes indicate a strong demand for, and capacity to buy, goods.
Fashion
WA/SA/NT

Top eCommerce buyers by household location

Onslow is the number one location for purchases per household in WA – recording volumes four times above the state average.

Onslow
WA 6710

West Perth
WA 6005

Port Hedland
WA 6721

Cleave
SA 5640

Roxby Downs
SA 5725

Kimba
SA 5641

Stuart Park
NT 0820

Rosebery
NT 0832

WA
parcels per household

SA
parcels per household

NT
parcels per household

Spotlight:
Port Hedland

Port Hedland is an iron-ore mining area in Western Australia, as well as a hub for online shopping. Without a wide range of bricks-and-mortar fashion outlets to choose from, residents here have moved online, with each household buying an average of 3.3 fashion items per year.
**Fashion**

**WA/SA/NT**

**Fastest-growing locations**

Western Australia showed modest growth in the Fashion category, with purchases up 4.7% year-on-year.

**Future growth**

Ellenbrook, in Perth’s northeast, is our number one tip for growth in online fashion in Western Australia. The suburb is on the cusp of a population boom: its award-winning urban development is set to provide housing, education, retail and community facilities for up to 35,000 new residents.

In South Australia, Mount Gambier is showing positive signs of growth and we predict this trend will continue.

**Spotlight:**

**NT 0822**

The 0822 postcode covers 41 different areas in the outer rural area of Darwin, including Bees Creek. It’s a popular place for families, offering an easy commute to the city along with the lifestyle benefits of the country. It’s also the fastest-growing region for online fashion purchases in the Northern Territory.
Health & Beauty overview

Health & Beauty has been the fastest-moving online shopping category in the past 12 months, growing by more than 50%.

It’s now the sixth biggest category overall, accounting for 6% of the total online retail market (up 27% from last year).

There has been solid growth in this category Australia-wide – including all metropolitan and regional areas, and all states/territories.

*Top buying locations*
- Auburn NSW
- Springvale VIC
- Rockdale NSW

*Top buyers by household*
- Springvale VIC
- Onslow WA
- Auburn NSW

*Top growth locations*
- Springvale VIC
- Rockdale NSW
- Mile End SA

*Future growth*
- Doncaster VIC
- Epping NSW
- Clayton VIC

*Top locations for online purchases
*Top locations for online purchases (parcels) per household
*Top locations by year-on-year growth in online purchases
* Our predictions for future growth
Top 5 buying locations in NSW

Auburn ranks first in the country for online health and beauty purchases.

Spotlight: Auburn, Rockdale & Rhodes

Areas with a high proportion of Chinese Australians tend to buy the most health and beauty products online. Auburn – the top suburb for the category in NSW – has a high proportion (18.8%) of residents with Chinese ancestry, while Rhodes was third on the list (18.5% Chinese ancestry). The national average for populations with Chinese ancestry is 3.1%. In general, residents who have migrated from overseas have a preference toward authentic Australian-made goods, which are perceived to be premium products with high quality control.
Health & Beauty
NSW/ACT

Top 5 buying locations in ACT

Belconnen ranks first in the ACT for buying health and beauty online.

Spotlight:
Belconnen

Belconnen is the ACT’s top spot for health and beauty, driven by the relative affluence of its residents. The median weekly household income in Belconnen stands at 52% above the national average, and they have a younger population (a median age of 32 compared to 37 nationally).
Health & Beauty
NSW/ACT

Top eCommerce buyers by household location

Auburn is the number one location for health and beauty purchases per household in NSW – recording 13 times above the state average.

**Auburn**
NSW 2144

<table>
<thead>
<tr>
<th>Location</th>
<th>NSW Parcels per Household</th>
<th>ACT Parcels per Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rockdale</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Rhodes</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Bonner</td>
<td>4.5</td>
<td>0.9</td>
</tr>
<tr>
<td>Belconnen</td>
<td>0.6</td>
<td>0.6</td>
</tr>
</tbody>
</table>

**Spotlight:**

**Bonner**

Bonner, on Canberra’s northern outskirts, is the top purchaser of health and beauty products on a per-household basis in ACT. Further housing developments are also slated for Bonner, making it another area to watch for future growth.
Health & Beauty
NSW/ACT

Fastest-growing locations
New South Wales performed well in the Health & Beauty category, with purchases up 48.2% year-on-year.

Future growth
Epping, in Sydney’s north-west, is a priority growth area and a focus for urban renewal. New schools and housing are predicted within the short to medium future, making it our pick for online shopping growth.

Spotlight: Kingsgrove
Kingsgrove is one of the fastest-growing areas for health and beauty purchases. Like Auburn and Rhodes, Kingsgrove has a high proportion of Chinese residents (18.2%), who appear to have a higher tendency than other shoppers to buy health and beauty products online.
### Health & Beauty
#### VIC/TAS

#### Top 5 buying locations in VIC

Springvale ranks second nationally for online purchases in the Health & Beauty category. However, it was Australia’s fastest-growing location and strongest performer on a per household basis.

#### Spotlight: Springvale

Point Cook topped most categories this year, but could only manage second in Health & Beauty. The top accolade went to Springvale, close to one of Victoria’s major educational institutions, Monash University – located in Melbourne’s south east.
Health & Beauty
VIC/TAS

Top 3 buying locations in TAS

Launceston ranks first in Tasmania for online purchases in the Health & Beauty category.

Spotlight:
Launceston

Launceston is the second largest city in Tasmania, but ranked above Hobart as the number one spot for health and beauty purchases online. It is home to 47,234 residents and the 127 year-old Launceston Post Office – an iconic architectural site, located amongst the city's main bricks-and-mortar shopping precinct.
**Health & Beauty**

**VIC/TAS**

**Top eCommerce buyers by household location**

Springvale is Australia's number one location for purchases per household – recording volumes 15 times above the national average.

**Springvale**

**VIC 3171**

6.2

**Blackburn**

**VIC 3130**

0.7

**Devonport**

**TAS 7310**

0.4

**Burnie**

**TAS 7320**

0.4

**Spotlight:**

**Blackburn**

Blackburn, in Melbourne's east, was a popular spot for health and beauty purchases last year, driven in some part by the area's family demographic. Young families make up the majority of households in Blackburn – 50.3% compared to the national average of 44.6%.
Health & Beauty
VIC/TAS

Fastest-growing locations
Victoria was the strongest performing state in Health & Beauty, with purchases up 66.8% year-on-year.

Future growth
Doncaster boasts one of the largest shopping centres in Australia. But we think it will be a centre for online shopping in the Health & Beauty category too. A high proportion of residents here have Chinese ancestry, in line with the trend observed in other high-performing areas for health and beauty products.

Spotlight: Kings Meadows
Kings Meadows, in Launceston's south, is said to have more retail outlets than anywhere else in the city. Residents are keen online shoppers too, at least for health and beauty products – topping the state in the category.
Top 5 buying locations in QLD

Mackay ranks fifth in Australia and first in Queensland for online health and beauty purchases.

Spotlight: Sunnybank & Sunnybank Hills

Almost a quarter (24%) of residents in Sunnybank and Sunnybank Hills have Chinese ancestry. It's a strong determinant for higher-than-average health and beauty purchases – the postcode is one of the top in Queensland for the category.
Health & Beauty
QLD

Top eCommerce buyers by household location

Mandurah ranks ninth nationally and first in Western Australia for online health and beauty purchases.

Spotlight:
Longreach

Longreach took out top spot for health and beauty purchases per household in Queensland in 2015. The population here is relatively young (the median age is 33 compared with 37 nationally) – potentially contributing to the purchases in this category.
Health & Beauty
QLD

Fastest-growing locations
Queensland’s overall growth in the health and beauty category was strong, with purchases up 41.6% year-on-year.

111.3% Coopers Plains QLD 4108
73.4% Parkinson QLD 4115
83% Banyo QLD 4014
72.2% Calamvale QLD 4116
73.4% St Lucia QLD 4067
66.4% Gladstone QLD 4680
65.9% Upper Coomera QLD 4209

Spotlight: Coopers Plains
Coopers Plains topped the fastest-growing list for health and beauty products. Along with neighbouring suburbs Salisbury and Sunnybank, it’s been an in-demand area for homebuyers in recent years.

Future growth
Wellington, 22km south-east of Brisbane, ranks first on our list of future growth areas in the Health & Beauty category. It has a median weekly household income 33% above the national median, and a higher proportion of families with children, a general determinant of online purchasing behaviour.
Health & Beauty
WA/SA/NT

Top 5 buying locations in WA

Mandurah ranks ninth nationally and first in Western Australia for online health and beauty purchases.

Spotlight:
Mandurah

Mandurah, south of Perth, is home to a relatively large population for a single postcode, with over 60,000 residents. The population is six years older than the national median age.
Health & Beauty
WA/SA/NT

Top 3 buying locations in SA

Mile End ranks first in South Australia for online health and beauty purchases.

Like its namesake in London, Mile End – in Adelaide’s inner west – is approximately a mile from the CBD. It also has an above average concentration of residents with Greek ancestry, 12.5% compared to the national average of 1.4%. The Adelaide suburb topped the state for health and beauty purchases.
Health & Beauty
WA/SA/NT

Top eCommerce buyers by household location

Onslow is the number one location for purchases per household in Western Australia, and number two in Australia – recording volumes 14 times above the national average.

Onslow
WA 6710

5.8

Nickol
WA 6714

Port Hedland
WA 6721

Mile End
SA 5031

Roxby Downs
SA 5725

Kingscote
SA 5223

Rosebery
NT 0832

Palmerston
NT 0830

Spotlight: Onslow / Nickol / Port Hedland / Roxby Downs

The list of top health and beauty postcodes on a per-household basis was dominated by fly-in-fly-out mining towns like Onslow, Nickol, Port Hedland and Roxby Downs. While they lack a range of shopping options, these towns share relatively high disposal incomes, prompting residents to go online for their goods.
Health & Beauty
WA/SA/NT

Fastest-growing locations

Western Australia performed well in health and beauty, with purchases up 40.3% year-on-year.

- **Carramar**
  - WA 6031
  - 69.8%
- **Onslow**
  - WA 6710
  - 66.5%
- **Pinjarra**
  - WA 6208
  - 68.8%
- **Bentley**
  - WA 6102
  - 62.5%
- **Mile End**
  - SA 5031
  - 387.7%
- **Willunga**
  - SA 5172
  - 178.6%
- **Davoren Park**
  - SA 5113
  - 88.5%
- **Rosebery**
  - NT 832
  - 55.9%
- **Gillen**
  - NT 870
  - 51.9%

Future growth

Armadale is an expanding area on Perth's south-eastern outskirts. The growing population, coupled with a young median age of 32, make it our pick for future growth in the Health & Beauty category in Western Australia.

Spotlight:

**Carramar**

The Perth suburb of Carramar has a median age of just 28 – nine years below the national median age. Young people are more likely to shop online, particularly for health and beauty products.
Inside Australian Online Shopping

Homewares & Appliances

Overview
NSW/ACT
VIC/TAS
QLD
WA/SA/NT

2016 eCommerce Industry Paper
**Homewares & Appliances overview**

Homewares & Appliances is the fourth largest category for online purchases in Australia, following a year-on-year increase of 19.5%.

Metropolitan locations were a beacon for growth, particularly in New South Wales and Victoria, with purchases up over 20% nationally on the previous year. Regional areas also experienced relatively strong growth, up 14% over the same period.

New housing developments proved to be the biggest drivers of growth in the Homewares & Appliances category, stimulated by enthusiastic homemakers shopping online to furnish their new homes.
Homewares & Appliances
NSW/ACT

Top 5 buying locations in NSW

Gosford ranks third nationally and first in NSW for online purchases in the Homewares & Appliances category.

Gosford
2250

Spotlight:

Gosford

Gosford ranks seventh nationally for total online purchases, but it ranks first in NSW in the Homewares & Appliances category. The area is popular for families – located within easy commuting distance from Sydney, with affordable housing and National Broadband Network connectivity.
Homewares & Appliances
NSW/ACT

Top 5 buying locations in ACT
Dunlop ranks first in the ACT for online purchases in the Homewares & Appliances category.

Spotlight:
O'Connor
O'Connor ranks third in the ACT for homewares and appliances. The suburb has a median weekly family income of $2,631, which is 59% higher than the national average.

Median weekly family income, O'Connor $2,631
National median $1,481

Dunlop 2615
Ngunnawal 2913
Belconnen 2617
O'Connor 2602
Calwell 2905
Homewares & Appliances
NSW/ACT

Top eCommerce buyers by household location

The Ponds recorded three times above the NSW average for purchases per household.

Spotlight:
The Ponds

The Ponds is NSW's premier location for purchases per household. It also ranked first in the Fashion and Department & Variety Store categories.

Spotlight:
Deakin

Deakin residents buy the most homewares and appliances in the ACT. The suburb's most famous residence, The Lodge, has changed hands a number of times in recent years... Could there be any connection?
Homewares & Appliances
NSW/ACT

Fastest-growing locations

New South Wales was a high performing state for the Homewares & Appliances category, with a 23.1% increase in purchases from last year.

Spotlight: Monash, Macarthur, Gowrie & Fadden

The 2904 postcode, which includes the Canberra suburbs of Monash, Macarthur, Gowrie and Fadden, was the second fastest-growing area for homewares and appliances purchases in the ACT, spurred by a weekly household income almost twice the national average.

Future growth

New home developments are a leading indicator for online purchases, particularly in the Homewares & Appliances category. For this reason, we predict areas such as Sydney's Frenchs Forest – a current target for developers – will be among the prime movers in this category in coming years.

Kingston, one of the oldest and most densely populated suburbs in Canberra, is our pick as the place to watch in the Homewares & Appliances space.
Homewares & Appliances
VIC/TAS

Top 5 buying locations in VIC

Point Cook is the number one location in Australia for homewares and appliance purchases online.

Spotlight:
Point Cook

Point Cook has certainly been keeping Australia Post delivery drivers busy. The suburb features prominently in our paper, topping the location listings for many online shopping categories including homewares and appliances.

Richmond, which has experienced a spate of new apartment builds in recent years, appears second.
Homewares & Appliances
VIC/TAS

📍 Top 3 buying locations in TAS

Launceston ranks first in Tasmania for homewares and appliance purchases online.

Spotlight:
Launceston

Launceston is the second largest city in Tasmania, but pipped Hobart as the number one spot for homewares and appliances purchases online. It is home to 47,234 residents and the 127 year-old Launceston Post Office – an iconic architectural site, located amongst the city’s main bricks-and-mortar retail hub.
## Homewares & Appliances
### VIC/TAS

<table>
<thead>
<tr>
<th>Location</th>
<th>VIC Parcels per Household</th>
<th>TAS Parcels per Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clyde North VIC 3978</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Abbotsford VIC 3067</td>
<td>1.5</td>
<td></td>
</tr>
<tr>
<td>Parkville VIC 3052</td>
<td>1.4</td>
<td></td>
</tr>
<tr>
<td>St Helens TAS 7216</td>
<td>0.7</td>
<td>0.7</td>
</tr>
<tr>
<td>Acton Park TAS 7170</td>
<td>0.7</td>
<td>0.7</td>
</tr>
</tbody>
</table>

### Top eCommerce buyers by household location

Clyde North recorded volumes four times above the state average for purchases per household in Victoria.

**Spotlight:**

**St Helens**

St Helens, the number one destination for homewares and appliances in Tasmania, is the state’s second largest shipping port and a popular fishing destination.
Homewares & Appliances
VIC/TAS

Fastest-growing locations
Victoria was the strongest performing state for homewares and appliance purchases Australia-wide, experiencing 23.7% growth.

Future growth
Our list of areas to watch in homewares and appliances include the newly developed areas of Craigieburn and Tarneit, and the more established suburbs of Kew and Preston.

In Tasmania, our prediction is Wynyard on the north-west coast.

Spotlight: Whittlesea
Who would want to leave Whittlesea? Very few people it seems. Just 4.8% of residents moved out of the area in 2013-14, the lowest departure rate for any Melbourne council locality. People here are clearly keen to buy new items for their home – the area ranked second in Victoria for fastest-growing homewares and appliance purchases.
Homewares & Appliances
QLD

Top 5 buying locations in QLD

Toowoomba ranks second in the country for online purchases in the Homewares & Appliances category.

Spotlight:
Gladstone

Gladstone is one of the most prominent areas in Queensland for homewares and appliance purchases, and is home to the state's largest multi-commodity shipping port.
Homewares & Appliances
QLD

Top eCommerce buyers by household location

Weipa recorded volumes two times above the state average for purchases per household in Queensland.

Spotlight:
Weipa

Weipa is one of the largest communities in the Cape York Peninsula. Mining giant Rio Tinto is investing in the Amrun bauxite expansion project, which has led to new housing in the area.
Homewares & Appliances
QLD

Fastest-growing locations
Queensland’s performance in the Homewares & Appliances category was strong, with a 16% increase in purchases from last year.

Future growth
Jimboomba is one of our predictions for strong growth in the Homewares & Appliances category. It’s part of the Greater Flagstone Priority Development which is expected to house around 120,000 people over the next 30-50 years.

Spotlight: Sandstone Point
Sandstone Point, north of Brisbane, is one of the fast movers in the Homewares & Appliances category. It’s a hub for above-average house sizes (47.9% of homes comprise four or more bedrooms, compared to the national average of 30.3%), with residents again turning to online stores to furnish their homes.
Homewares & Appliances
WA/SA/NT

Top 5 buying locations in WA

Mandurah ranks eighth in Australia and first in Western Australia for online purchases of homewares and appliances.

Spotlight:
Success

The aptly named suburb of Success in Perth’s south has also been somewhat of a success for homewares and appliance retailers, as the number two suburb for this category in Western Australia.
### Homewares & Appliances
**WA/SA/NT**

#### Top 3 buying locations in SA

Happy Valley ranks first in South Australia for online purchases in the Homewares & Appliances category.

- **Morphett Vale**
  - 5162
  - Morphett Vale was high on the list of Adelaide suburbs for homewares and appliances purchases, driven in part by a high migration rate, as demonstrated by the 492 properties that changed hands in the 5162 postcode last year – a key indicator for purchases in this category.

- **Happy Valley**
  - 5159

- **Mount Gambier**
  - 5290
Homewares & Appliances
WA/SA/NT

Top eCommerce buyers by household location
Exmouth recorded purchases three times above the state average for purchases per household in Western Australia.

<table>
<thead>
<tr>
<th>Location</th>
<th>Parcels per Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exmouth</td>
<td>1.6</td>
</tr>
<tr>
<td>Newman</td>
<td>1.4</td>
</tr>
<tr>
<td>Port Hedland</td>
<td>1.3</td>
</tr>
<tr>
<td>Roxby Downs</td>
<td>1</td>
</tr>
<tr>
<td>Norwood</td>
<td>0.9</td>
</tr>
<tr>
<td>Stirling</td>
<td>0.8</td>
</tr>
</tbody>
</table>

Spotlight: Roxby Downs
Job cuts hit Roxby Downs hard last year, due to slowing activity at the nearby Olympic Dam mine. But the regional South Australian town still spent big on homewares and appliances, ranking first in the state for this category on a per household basis.
Homewares & Appliances
WA/SA/NT

**Fastest-growing locations**

South Australia’s performance in the Homewares & Appliances category was strong, with 18.6% growth in purchases from the previous year.

**Spotlight:**

**Woodville West**

Woodville West is one of the fastest-growing postcodes for homewares and appliances in South Australia. The Adelaide suburb has a higher-than-average composition of family households (77.8% compared with a 71.5% national average) and a range of new housing developments – both key drivers in online sales.

**Future growth**

Nedlands, 7km from the centre of Perth, is one of our projected growth areas for the Homewares & Appliances category. The existing infrastructure, coupled with new housing developments, are creating the right ingredients for population growth, and therefore stimulating online retail spend.

Seaford Rise in Adelaide’s south has affordable housing and good transport links. It’s our pick for future growth in the Homewares & Appliances category in South Australia.
Inside Australian Online Shopping

Media
Overview
NSW/ACT
VIC/TAS
QLD
WA/SA/NT

2016 eCommerce Industry Paper
Media overview

Media is growing significantly in popularity, achieving the second-highest growth rate for any category – up 40% from 2014. It now accounts for 14% of all online purchases in Australia. More often than not, the top locations for online media purchases have neighbouring schools and universities, which suggests that the higher levels of media consumption is being driven by the students attending these institutions.

Regional growth is on par with metropolitan growth, suggesting that regional residents are adopting online shopping for media purchases at the same pace as their city-based counterparts.

- **Top buying locations**
  - Toowoomba QLD
  - Point Cook VIC
  - Liverpool NSW
  
  * top locations for online purchases

- **Top buyers by household**
  - Clyde North VIC
  - Nathan QLD
  - Greenway ACT
  
  * top locations for online purchases (parcels) per household

- **Top growth locations**
  - Haberfield NSW
  - Officer VIC
  - Whittlesea VIC
  
  * top locations by year-on-year growth in online purchases

- **Future growth**
  - Noosaville QLD
  - Ellenbrook WA
  - Monash ACT
  
  * our predictions for future growth
Media
NSW/ACT

Top 5 buying locations in NSW

Liverpool ranks third in the country for online media purchases.

Spotlight:
2560

Postcode 2560 – which covers suburbs like Campbelltown in Sydney’s south west – has all the ingredients for online shopping growth: a young population (33 versus the national median of 37) and a high concentration of family households (78.1% compared to 71.5% nationally).
Media
NSW/ACT

Top 5 buying locations in ACT
Dunlop ranks first in the ACT for buying media online.

Spotlight:
Ngunnawal
Ngunnawal was one of the top areas for media purchases in the ACT. The suburb has a median household income of $2,046 – 66% above the national median of $1,234.
Media
NSW/ACT

Top eCommerce buyers by household location

Greenway is the number one location for media purchases per household in ACT – recording three times above the state average.

<table>
<thead>
<tr>
<th>Location</th>
<th>NSW Parcels per Household</th>
<th>ACT Parcels per Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Ponds NSW 2769</td>
<td>2.1</td>
<td></td>
</tr>
<tr>
<td>Rooty Hill NSW 2766</td>
<td>1.3</td>
<td></td>
</tr>
<tr>
<td>Rossmore NSW 2557</td>
<td>1.2</td>
<td></td>
</tr>
<tr>
<td>Greenway ACT 2900</td>
<td>2.3</td>
<td>1.4</td>
</tr>
<tr>
<td>Deakin ACT 2600</td>
<td>1.4</td>
<td>0.9</td>
</tr>
<tr>
<td>Kingston ACT 2604</td>
<td>0.9</td>
<td></td>
</tr>
</tbody>
</table>

Spotlight:
Rossmore

Rossmore ranks third for media purchases per household in NSW. The area is popular with families (87.3% family households compared with the national average, 71.5%) and it also has a large proportion of dwellings that are owned outright, 44.5% compared to the Australian average of 32.1%.
Media
NSW/ACT

Fastest-growing locations

New South Wales and the ACT performed well in Media, with purchases up 41.1% and 42.2% respectively year-on-year.

Future growth

We predict strong growth for media sales in Blaxland. The Canberra suburb is the site of one of Australia's top universities – ANU – and has a median weekly household income 31% above the national average.

Spotlight: Calwell

Calwell, in Canberra's south, is a popular area for young families (50.7% of households have children compared with the national average, 44.6%). Families are big consumers of online shopping in general, but books and tablets are particularly popular.
Top 5 buying locations in VIC

Point Cook ranks second nationally for buying media online.

Spotlight:

Cranbourne & Cranbourne East

Cranbourne and Cranbourne East have the largest-growing populations in Australia, according to the ABS. From July 2014 to June 2015, an average of 88 people per week moved into the area. It appears this led to a boom in online sales – the postcode ranked third in the state for media purchases.
Media
VIC/TAS

Top 3 buying locations in TAS

Launceston ranks first in Tasmania for online media purchases.

Spotlight: Launceston

Launceston ranks first in Tasmania for online purchases in the Media category. Launceston is the second largest city in Tasmania, but pipped Hobart as the number one spot for Media online purchases.

It is home to 47,234 residents and the 127 year-old Launceston Post Office – an iconic architectural site, located amongst the city’s main concentration of bricks-and-mortar stores.
Top eCommerce buyers by household location

Clyde North was the number one location for purchases per household in Australia, recording volumes five times above the national average.

Spotlight: Officer

Officer is in Victoria’s south-eastern growth corridor. There are ten schools in the town, driving high per-household consumption of media products.
Media
VIC/TAS

Fastest-growing locations

Victoria and Tasmania experienced strong performances in Media, with purchases up 42% year-on-year.

VIC

- Officer
  VIC 3809
  101.2%

- Clyde North
  VIC 3978
  89.3%

- Whittlesea
  VIC 3757
  99.9%

- Carrum Downs
  VIC 3201
  74.8%

TAS

- Smithton
  TAS 7330
  54.1%

- Acton Park
  TAS 7170
  54.1%

Spotlight: Carrum Downs

Carrum Downs, in Melbourne’s outer southern suburbs, has seen a population boom in recent years, with a number of new multi-unit housing blocks being developed. It is fourth on the list of Victoria’s fastest-growing suburbs for online media purchases.

Future growth

Northcote, in Melbourne’s inner north, has transformed from a solid working class area to a hipster hangout in recent years. Now families are moving into the suburb to take advantage of its wide selection of schools. Northcote – and Preston, not far up the road – are our picks for the biggest growth in online media purchases in coming years.
Media
QLD

**Top 5 buying locations in QLD**

Toowoomba ranks first in Australia for media purchases online.

---

Spotlight:

Nerang

Nerang – about 10km inland from Gold Coast’s beaches – was one of the top areas for media sales in Queensland last year. The suburb is popular with families (77.5% family households compared with the national average, 71.5%).
**Top eCommerce buyers by household location**

Nathan was the number two location for purchases per household in Australia, five times above the national average.

### Median age, Nathan

- **Nathan 24 years**
- **National median 37 years**

### Spotlight:

**Nathan**

Nathan, a southern suburb of Brisbane, has one of the youngest populations in the state. The median age here is just 24, which is 13 years below the national median. That means more school and university-aged residents, and a higher demand for media items like books and tablet devices.
Media
QLD

Fastest-growing locations
Queensland was the strongest performing state for media purchases nationally, with purchases up 42.4%.

Narangba (4504), Forest Lake (4078) and Mudgeerba (4213) all have a high proportion of young families – 57.3%, 51.8% and 50.4% respectively, against a national average of 44.6%. So we believe they’ll be strong growth areas for the Media category in years to come.

Spotlight: Beaudesert
Beaudesert is a town of around 6,000 residents in Queensland’s south east. It was the second fastest-growing region for online media sales in the state, driven in part by the relatively high concentration of education employment here. Compared with a national average of 4.6%, the education workforce makes up 5.8% of residents in Beaudesert.
**Media**
**WA/SA/NT**

**Top 5 buying locations in WA**

Mandurah ranks 22nd nationally and first in Western Australia for media purchases online.

**Spotlight:**

**Canning Vale**

Canning Vale (6155) was third for online media purchases in Western Australia, behind Mandurah and Joondalup. It has a high proportion of young families – 57.1%, against a national average of 44.6% – and lower than average median ages (34 compared with the national median, 37). So we believe it will experience strong growth in media in years to come.
Top 3 buying locations in SA

Paralowie ranks first in South Australia for online media purchases.

Spotlight:
Salisbury & Paralowie areas

Postcode 5108 covers areas like Salisbury and Paralowie in Adelaide’s north. It was the top area for media sales in South Australia last year. The location is home to a relatively high proportion of one parent families, 26.1% compared to the national average of 15.9%.
Media
WA/SA/NT

Top eCommerce buyers by household location

Broome is the number one location for purchases per household in Western Australia, double the average state volume.

<table>
<thead>
<tr>
<th>Location</th>
<th>WA Parcels</th>
<th>SA Parcels</th>
<th>NT Parcels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broome</td>
<td>1.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Port Hedland</td>
<td>1.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>West Perth</td>
<td>1.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yanchep</td>
<td>1.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norwood</td>
<td>0.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roxby Downs</td>
<td>0.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rosebery</td>
<td>0.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coconut Grove</td>
<td>0.2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Spotlight:
Broome

Broome – a tourist hotspot in northern WA – is a hotspot for media purchases as well. Households here received an average 1.2 parcels containing media items last year. Broome has many of the necessary factors for strong per-household sales in this category: a young population (32 versus the national median of 37), a strong education industry (6.5% of the population are employed in education), and a relative lack of choice when it comes to bricks-and-mortar options.
Spotlight:

Tea Tree Gully

Building approval ratings have dropped 8% in South Australia over the past year. But Tea Tree Gully – in the city's north – has bucked the trend. New building applications lodged in the past 12 months totalled $45 million, perhaps contributing to the surge in online media spending. It was the number one postcode for the category in South Australia.

Future growth

Whyalla, a regional city on the Eyre Peninsula’s Spencer Gulf, has an impressive array of schools, as well as a TAFE and university campus, the ingredients for a high number of Media category purchases.
Specialty Food & Liquor overview

Specialty Food & Liquor is a future online growth area. While it currently accounts for 9% of the Australian eCommerce market (the fifth-largest category overall), growth has been strong; up 8.7% from last year.

Regional growth exceeded that of metropolitan by 3%, suggesting that regional residents are adopting online shopping for specialty food and liquor purchases faster than their city-based counterparts.
Specialty Food & Liquor
NSW/ACT

Top 5 buying locations in NSW
Mosman ranks first in NSW for buying specialty food and liquor online.

Mosman, on Sydney’s north shore, is one of the city’s most exclusive enclaves. Household median income here is $2,463, double the national median. They’re big consumers of specialty food and liquor too – it’s the number one suburb for online purchases in NSW.
Spotlight: Dunlop

Dunlop is the ACT's top location for specialty food and liquor purchases online, driven by the relative affluence of its residents. The median weekly household income in Dunlop stands at 44% above the national average.
Specialty Food & Liquor
NSW/ACT

Top eCommerce buyers by household location

Newcastle is the number one location for purchases per household in NSW – recording three times above the state average.

<table>
<thead>
<tr>
<th>Location</th>
<th>NSW Parcels</th>
<th>ACT Parcels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle</td>
<td>1</td>
<td>0.9</td>
</tr>
<tr>
<td>Terrey Hills</td>
<td>0.9</td>
<td>1.6</td>
</tr>
<tr>
<td>Griffith</td>
<td>0.8</td>
<td></td>
</tr>
</tbody>
</table>

NSW parcels per household
ACT parcels per household

Spotlight: Terrey Hills

Terrey Hills is a wealthy suburb in Sydney's north. Households here on average made around one specialty food and liquor purchase online last year.

Spotlight: Griffith

Griffith, an agriculture area in NSW, is part of Australia’s ‘food bowl’. While the agricultural produce is abundant here, people have been seeking out specialty items online. It’s one of the top per-household suburbs in the category in ACT.
New South Wales was the second-best performing state for specialty food and liquor, with purchases up 17.5% year-on-year.

**Fastest-growing locations**

<table>
<thead>
<tr>
<th>Location</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Hoxton</td>
<td>53.4%</td>
</tr>
<tr>
<td>Camden</td>
<td>44.1%</td>
</tr>
<tr>
<td>Glenmore Park</td>
<td>44.1%</td>
</tr>
<tr>
<td>Braddon</td>
<td>24.4%</td>
</tr>
<tr>
<td>Amaroo</td>
<td>20.7%</td>
</tr>
<tr>
<td>Monash</td>
<td>16.9%</td>
</tr>
</tbody>
</table>

**Future growth**

Ulladulla, close to several national parks, will be the big movers in NSW in the coming years for specialty food and liquor items. The population's median age is 50, which is 13 years older than the national median. The local residents also appear to have mature tastes in food and liquor.

**Spotlight: Braddon**

Braddon, one of Canberra's oldest and most densely populated areas, made it onto Urbis's 'Hip List' for the ‘most hipster suburbs in Australia’ in 2014. They're clearly connoisseurs of fine food and drink in Braddon, making the Specialty Food & Liquor hit list as well.
Specialty Food & Liquor
VIC/TAS

Top 5 buying locations in VIC

Grovedale ranks first in Victoria for online specialty food and liquor purchases.

Spotlight:
Grovedale and Point Cook

Grovedale in Geelong and Point Cook in Melbourne’s outer West were the top online shopping suburbs in Victoria for specialty food and liquor. Both have experienced significant housing growth in recent years. The lack of physical shopping options surrounding new housing developments is a key driver of online shopping growth.
**Specialty Food & Liquor**

**VIC/TAS**

---

Top 3 buying locations in TAS

Launceston ranks third nationally for online specialty food and liquor purchases.

---

**Spotlight:**

Launceston

Launceston ranks first in Tasmania for online purchases in the specialty food and liquor category. Launceston is the second largest city in Tasmania, but pipped Hobart as the number one spot for specialty food and liquor online purchases.

It is home to 47,234 residents and the 127 year-old Launceston Post Office – an iconic architectural site, located amongst the city’s major bricks-and-mortar retail hub.
**Specialty Food & Liquor**  
**VIC/TAS**

### Top eCommerce buyers by household location

Port Melbourne was the number one location for purchases per household in Victoria, recording volumes three times above the state average.

<table>
<thead>
<tr>
<th>Location</th>
<th>VIC Parcels per Household</th>
<th>TAS Parcels per Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Melbourne</td>
<td>1.3</td>
<td></td>
</tr>
<tr>
<td>Southbank</td>
<td>0.9</td>
<td></td>
</tr>
<tr>
<td>Geelong</td>
<td>0.9</td>
<td></td>
</tr>
<tr>
<td>Currie</td>
<td>1.6</td>
<td></td>
</tr>
<tr>
<td>Sandy Bay</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### Spotlight: Geelong

Specialty food and liquor purchases tend to be made in areas with a slightly higher median age. In Geelong, the population's median age is 40, slightly higher than the national median of 37. The local residents also appear to have mature tastes in food and liquor, buying an average of one specialty food and liquor item per household each year.
Overview

NSW/ACT
VIC/TAS
QLD
WA/SA/NT

Inside Australian Online Shopping © Australia Post

Industry overview

Fastest-growing locations

Victoria performed well in the Specialty Food & Liquor category, with purchases up 3.8% year-on-year.

Future growth

Yarrawonga, located on the south bank of the Murray River, is a popular tourism destination for activities such as boating, kayaking and fishing. Like other areas where specialty food and liquor purchases are trending upwards, the population’s median age is higher than the national median (47 compared with 37), making it our prediction for future growth destination in this category.

Spotlight: Kilmore

Kilmore, 60km north of Melbourne, is one of Victoria’s oldest inland towns. It’s home to an impressive collection of nineteenth-century bluestone buildings, many of which have been converted into restaurants. It’s also the fastest-growing area for specialty food and liquor purchases, increasing 37.9% last year.
Specialty Food & Liquor
QLD

**Top 5 buying locations in QLD**

Cairns ranks first in Australia for specialty food and liquor purchases online.

**Spotlight:**

**Bundaberg**

Bundaberg, north of Brisbane, is famous for its specialty drinks. Both Bundaberg Rum and Bundaberg Ginger Beer were created here. The town has a taste for buying food and liquor online too – it came in at third place in the category for Queensland.
Overview

Top eCommerce buyers by household location

Weipa was the number one location for purchases per household in Queensland, recording volumes three times above the state average.

**Weipa**
QLD 4874
1.4

**Point Lookout**
QLD 4183
1.3

**Murarrie**
QLD 4172
1.2

**Spotlight:**

Weipa

To get some idea of Weipa's isolation, consider this. The town's closest major city is Port Moresby in Papua New Guinea. With limited access to shopping options, residents here have chosen to buy online for specialty products.
Specialty Food & Liquor
QLD

Fastest-growing locations

Queensland was the best performing state for specialty food and liquor, with purchases up 22% year-on-year.

<table>
<thead>
<tr>
<th>Location</th>
<th>Growth Rate</th>
<th>Location</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornubia, QLD 4130</td>
<td>63.8%</td>
<td>Highfields, QLD 4352</td>
<td>56.8%</td>
</tr>
<tr>
<td>Narangba, QLD 4352</td>
<td>51.7%</td>
<td>Proserpine, QLD 4800</td>
<td>50.9%</td>
</tr>
</tbody>
</table>

Future growth

Emerald, a large, modern country town that was established in 1879, is our top pick for future online shopping growth. Located within the Central highlands region, it has been earmarked for high-speed broadband development into homes and businesses.

Spotlight: Cornubia

Cornubia, 30km south of central Brisbane, has been a big population growth area in recent times, driven by new subdivisions and developments. New households have led to increased online shopping – it’s the fastest-growing suburb for online specialty food and liquor purchases in Queensland.
Specialty Food & Liquor
WA/SA/NT

Top 5 buying locations in WA
Mandurah ranks second nationally for online purchases in specialty food and liquor.

Spotlight:
Mandurah
Mandurah, south of Perth, is home to a relatively large population for a single postcode, with over 60,000 residents. The population is six years older than the national average. Both reasons why the area has topped the charts in the Specialty Food & Liquor category.
Specialty Food & Liquor
WA/SA/NT

**Top 3 buying locations in SA**

Happy Valley ranks first in South Australia for online specialty food and liquor purchases.

**Spotlight:**

**Happy Valley**

Happy Valley, located around 20km south of Adelaide's CBD, is a popular area for young families, 49.2% compared to the national average of 44.6%. A large proportion of the occupied dwellings here are either owned outright or with a mortgage, 83.2% compared to Australian average of 67%.
Specialty Food & Liquor
WA/SA/NT

Top eCommerce buyers by household location

Onslow is the number one location for purchases per household in Australia, recording volumes 17 times above the national average.

Stirling
SA 5152
1.2

Tanunda
SA 5352
1

Unley
SA 5061
0.9

Stuart Park
NT 0820
0.8

Howard Springs
NT 0835
0.7

WA/SA/NT

Spotlight:

Stirling

Despite being just 25 minutes from the centre of Adelaide, Stirling – in the Adelaide Hills – enjoys a bustling, small town feel. It has a burgeoning gourmet food and wine scene too, a trend that has continued online. Residents here buy more specialty food and wine products per household than anywhere else in the state.
**Specialty Food & Liquor**  
**WA/SA/NT**

### Fastest-growing locations

In South Australia online purchases of specialty food and liquor items were flat overall, however there were pockets of growth across the state.

- **Onslow**: 37.3%
  - WA 6710
- **Kalgoorlie**: 19.2%
  - WA 6430
- **Byford**: 28.3%
  - WA 6122
- **Yanchep**: 16.3%
  - WA 6035
- **Kingscote**: 50.6%
  - SA 5223
- **Hackham**: 21.8%
  - SA 5163
- **Seaford Rise**: 31%
  - SA 5169
- **Mount Gambier**: 21.1%
  - SA 5290
- **Wanguri**: 7.1%
  - NT 812
- **Howard Springs**: 2%
  - NT 835

### Future growth

Forrestfield is an area that’s targeted by developers for new residential and commercial projects, including a shopping centre. We predict solid online shopping growth here.

### Spotlight:

**Kangaroo Island**

In the past decade Kangaroo Island has transformed from a low-key holiday getaway for South Australians, to a world-renowned destination on the top of many ‘best-of’ lists. As the island’s reputation has grown, so too has its fondness for online shopping. Specialty Food & Liquor purchases in Kingscote, Kangaroo Island’s biggest town, grew 36.9% year-on-year.
Inside Australian Online Shopping

Christmas

Overview
Games & Toys
Recreational Goods
Fashion
Specialty Food & Liquor

2016 eCommerce Industry Paper
Christmas is by far the busiest period for online shopping – 28% of all online purchases in 2015 occurred between October and December. During this time, we delivered more than 30 million items, up 2.5% from 2014. On 21 December alone, Australians received more than 1.96 million parcels.

What’s driving the growth? While Department & Variety Stores was the number one category for the festive season, Media (such as books and tablets) was the biggest growth area, up 31.7% year-on-year. This was followed by Recreational Goods (20.5%), Health & Beauty (19.4%) and Games & Toys (13.6%).

The following pages highlight some of the online shopping locations that experienced a seasonal spike in the lead-up to the peak holiday period.
Christmas Games & Toys

Top 3 locations

Victoria Point, just south of Brisbane, was the number one area for games and toy purchases last year. Interestingly the population has a high median age, with several retirement villages in the area. Perhaps grandparents have been heading online to buy presents for their grandchildren?
Cranbourne is a large growth area on Melbourne's southern fringe. The suburb bought more recreational goods than any other area in Australia last Christmas.
Bateau Bay was the surprise winner in the Christmas fashion stakes last year. The Central Coast holiday spot turned to online shopping for the majority of their fashion gifts and personal purchases.

Bateau Bay, on NSW’s Central Coast, is known as a destination for holiday-makers. It was also the number one location for fashion purchases last Christmas.
Christmas
Specialty Food & Liquor

Top 3 locations

Christmas is a popular time to spend on specialty food and liquor. Berwick and Pakenham, both located in Melbourne’s south-east growth corridor, led the list of purchases in 2015, boosted by new housing developments and rapid population growth.

Berwick VIC
Pakenham VIC
Kalgoorlie WA
Methodology & references

Research methodology

This paper consists of analysis performed by Australia Post into physical goods bought online and delivered to Australian residents, publicly available information, statistics from the Australian Bureau of Statistics (ABS), and online retail environment data, as provided to Australia Post by Quantium.

The majority of the data and insights within this publication – as highlighted within the Industry overview section – is based on a subset of Australia Post deliveries, undertaken between January 2014 and December 2015, and aggregated to postcode level.

The Christmas period is defined as October–December for 2014 and 2015.

For ease of reference, postcodes were substituted with suburb or town names. There are instances where more than one suburb shares a single postcode; where relevant, multiple location names have been specified.

The main paper only features product categories that represent more than 6% of online purchases (Department & Variety Stores, Fashion, Health & Beauty, Homewares & Appliances, Media, and Specialty Food & Liquor).

The analysis does not cover all online purchases, we excluded marketplaces, central business district (CBD) locations and postcodes comprising low residential population.

Our insights are drawn from figures representing the top buying postcodes by volume; the top buying postcodes based on the average number of parcels received per household (also known as average parcels per household); and the postcodes showing the highest year-on-year growth for online purchases – by volume and parcels per household.

Once we established the highest performing postcodes, Australia Post used the following terms to describe current performance: Top buying locations, Top buyers by household and Top growth locations.

Publicly available traditional retail sales data and statistics sourced from the Australian Bureau of Statistics (ABS) was used to support our analysis of areas predicted to experience future growth, as represented in the industry sections. The term used to describe this detail was: Future growth (or future predictions).

References

1. Australia Post Consumer Parcel Receivers Survey n=2,000
2. All Online Retail statistics are sourced from the NAB Online Retail Sales Index (NORSI)
3. Online Physical Goods Index is a sub-set of NORSI. NORSI is sourced from NAB and Market Blueprint. NAB and Market Blueprint take no responsibility for the accuracy of the information shown
4. Traditional retail sales data and statistics in Spotlight sections are sourced from the Australian Bureau of Statistics (ABS)
5. Australia Post independent qualitative research undertaken by RealityCheck, March 2015
About Australia Post

Australia Post, together with its parcels business – StarTrack – form the largest parcels, freight and logistics provider in Australia, servicing the largest retail and delivery network in the country. With our unrivalled suite of eCommerce-driven logistics, supply chain and parcel delivery solutions, we help our customers transact, get online, shop, pay and deliver, providing a competitive advantage to local and international businesses and online marketplaces.

Visit us online at auspost.com.au and startrack.com.au

About NAB Online Retail Sales Index

The NAB Online Retail Sales Index (NORSI) is based on up to 2 million non-cash transactions per day, scaled up to replicate the broad economy. The data represents the scope of the online retail environment. The Index provides key insights into online spending in retail goods, capturing domestic and international trends, as well as regional and age demographic trends. The Index is published monthly by NAB Business Banking, Business Research and Insights.

For figures prior to 2014, online market definitions excluded take away food and smaller online retailers. However, given the growth in this industry has only occurred in recent years and market proportions are relatively small, no further adjustments have been made to restate disclosed publications from NORSI, except for 2014 overall online retail spend.

About Quantum

Quantium is Australia’s leading data analytics and marketing strategy firm. Quantium has worked with NAB for more than six years, assessing de-identified transaction data to derive insights, trends and shopping habits of different customer groups. The resulting analysis forms Market Blueprint and is used by NAB and other businesses to drive innovation and business performance through customer, distribution and marketing strategies. NORSI numbers have been prepared by Quantum using raw NAB data owned by National Australia Bank (NAB). NAB has not been involved in the analysis of the raw NAB data nor the preparation of this paper or the information contained in it. Neither NAB nor Market Blueprint make any representations (express or implied) nor give any warranty in relation to the accuracy, completeness or appropriateness of the raw data, the analysis or this paper. To the maximum extent permitted by law, each of NAB and Market Blueprint expressly disclaims, takes no responsibility for and has no liability for the preparation, contents, accuracy or completeness of this paper or the analysis in which it is based. All right, title and interest relating to NORSI numbers in this paper remains with Market Blueprint.

Disclaimer

This paper is published for general information purposes only. The views and opinions expressed in this paper, and any advice provided, is general in nature only. Australia Post does not represent that any information or advice herein is suitable for your particular circumstances or purposes. While every effort has been made to ensure the accuracy of this paper at the time of publication, Australia Post takes no responsibility for any errors or omissions herein. Australia Post does not accept any liability for any loss or damage incurred by any use or reliance of any information or advice contained in this paper. Before relying on any information or advice contained in this paper, you should independently verify its accuracy, currency, completeness and relevance for your purposes.