



# Inside Australian Online Shopping

2016 eCommerce Industry Paper





## 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 Quantum. 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.

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## Message from Managing Director & Group CEO

Message from  
GM eCommerce  
Platforms & Digital

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 –

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**We have drawn from our vast, nationwide processing and delivery network to deliver a comprehensive picture of where Australians are shopping online, and the areas that are growing the fastest.**

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



Message from  
Managing Director  
& Group CEO

**Message from  
GM eCommerce  
Platforms & Digital**

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

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**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.**

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. In fact, 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](mailto:acquire@auspost.com.au)

**Ben Franzi**  
General Manager,  
eCommerce Platforms & Digital



## Executive summary

### Executive summary

#### 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.

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**Consumers are finding comfort in discretionary and “feel-good” items, highlighted by exceptional growth in Health and beauty and Media.**

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.

#### Online purchasing categories

**Department & Variety Stores and Fashion**

**58%**



**Department and variety store and fashion items make up more than half of all online purchases.**



## Executive summary

## Executive summary

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

Key drivers of online shopping growth

What are Australians buying?

## 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 online<sup>1</sup>, 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%.

<sup>1</sup> Australia Post Consumer Parcel Receivers Survey n=2,000.

<sup>2</sup> All Online Retail statistics are sourced from the NAB Online Retail Sales Index (NORSI).

<sup>3</sup> 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.

<sup>4</sup> Traditional retail sales data and statistics in Spotlight sections are sourced from the Australian Bureau of Statistics (ABS).

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 year<sup>2</sup> – with digital services contributing around a quarter of that amount<sup>3</sup>. In the same period, online spending on physical goods increased by approximately 6%<sup>3</sup>, compared to bricks-and-mortar spend which only increased by 4.2%<sup>4</sup>.

2015  
\$19 billion

2014  
\$17 billion



Australians spent \$19 billion online in 2015, 12% higher than the previous year<sup>2</sup>.



## The state of Australian eCommerce

Key drivers of online shopping growth

What are Australians buying?

## The state of Australian eCommerce

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<sup>3</sup>. As the Australian dollar weakened in December 2015, domestic online spending on physical goods grew 6% year-on-year, while international declined by 2%<sup>3</sup>.

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<sup>2</sup>.

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.

**On a per-capita basis, ACT residents spent the most online.**

<sup>2</sup> All Online Retail statistics are sourced from the NAB Online Retail Sales Index (NORSI).  
<sup>3</sup> 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.

### Online physical goods

**73%**  
Domestic



**Domestic goods make up 73% of the online spending market in Australia<sup>3</sup>.**





The state of Australian eCommerce

### Key drivers of online shopping growth

What are Australians buying?

## 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.



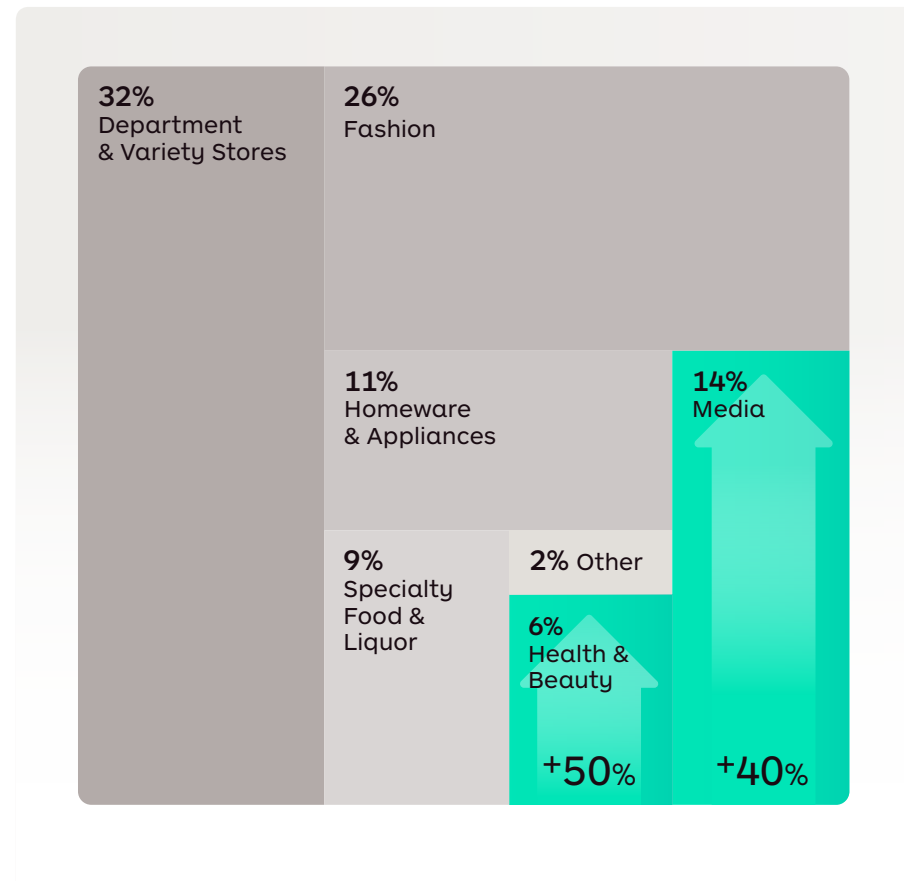
The state of Australian eCommerce  
 Key drivers of online shopping growth  
**What are Australians buying?**

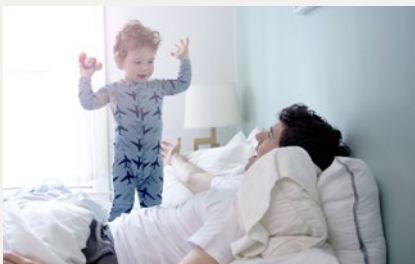
## What are Australians buying?

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.

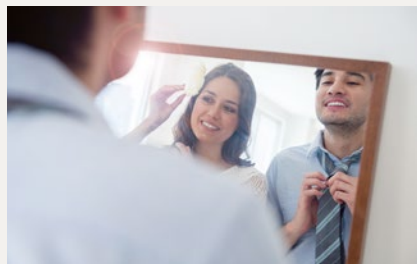
Health & Beauty and Media are the fastest-growing categories, up an impressive 50% and 40% respectively. Homewares & Appliances trails with 20% growth, followed closely by Fashion, up 16%.

### What are people buying?

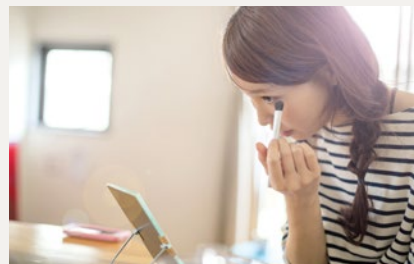




**Department  
& Variety Stores**



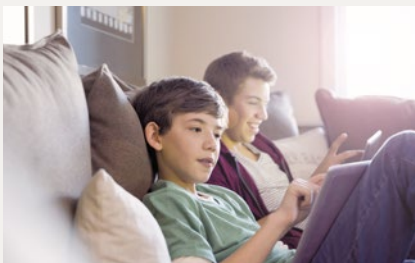
**Fashion**



**Health & Beauty**



**Homewares  
& Appliances**



**Media**



**Specialty Food  
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**Seasonal Overview  
Christmas**



# Inside Australian Online Shopping

 Department & Variety Stores

- Overview
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## Department & Variety Stores

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## 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 locations for online purchases

### Top buyers by household\*

Clyde North VIC

Onslow WA

Currie TAS

\* top locations for online purchases (parcels) per household

### Top growth locations\*

Mount Duneed VIC

Ardrossan SA

Haberfield NSW

\* top locations by year-on-year growth in online purchases

### Future growth\*

Green Valley NSW

South Morang VIC

Panania NSW

\* our predictions for future growth



### Department & Variety Stores

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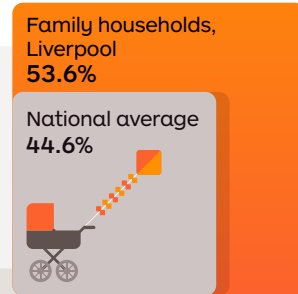
Specialty Food & Liquor

Christmas

## 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.



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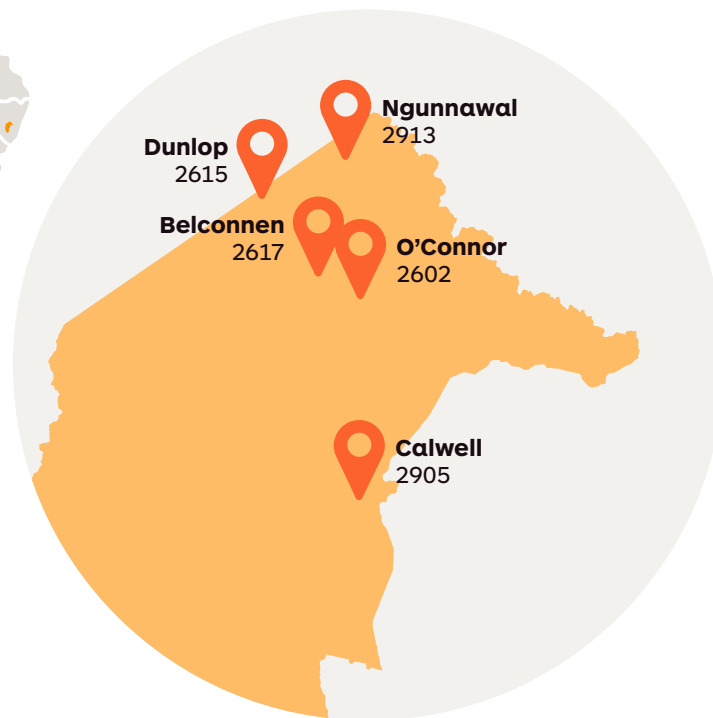
Specialty Food & Liquor

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## 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.



Household median weekly income, Dunlop **\$1,782**

National median **\$1,234**



### 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

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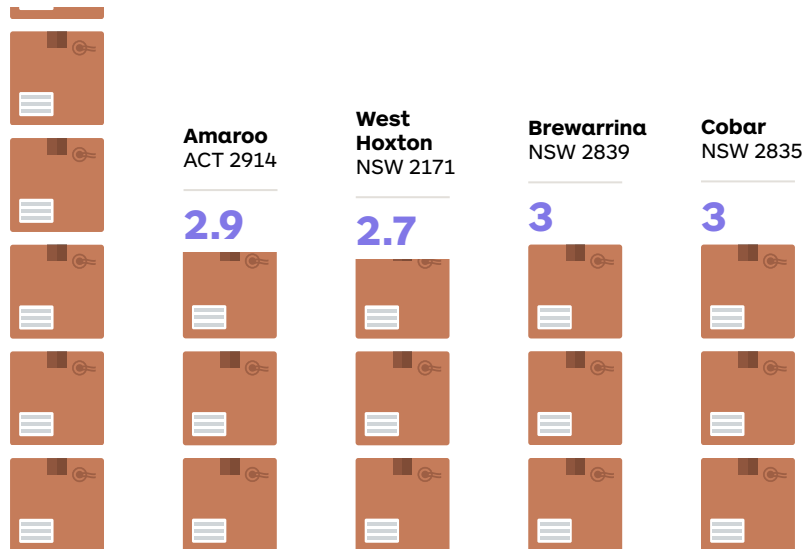
## Department & Variety Stores NSW/ACT

### 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

**5.1**



**Metro**  
parcels per household

**Regional**  
parcels per household

2011 Census  
Most advantaged  
suburb of Sydney



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.





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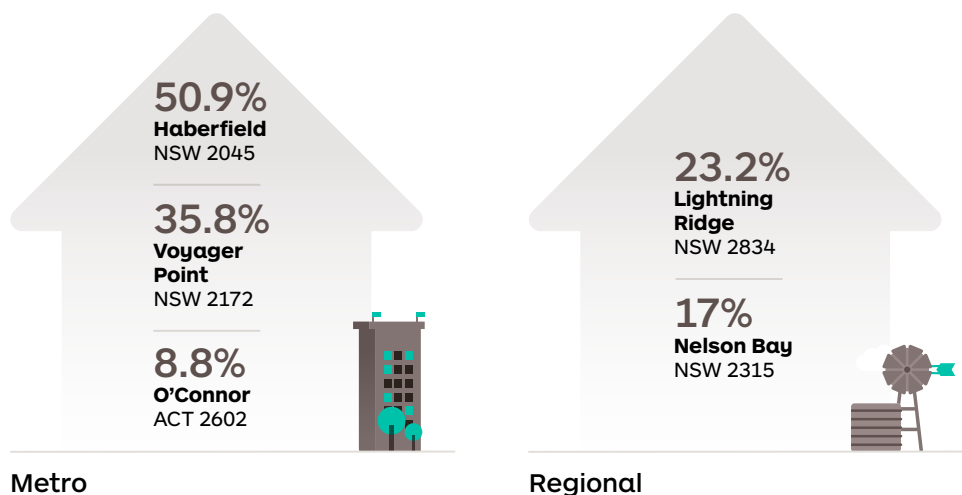
Christmas

## 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.



### 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%.



## 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.



### Department & Variety Stores

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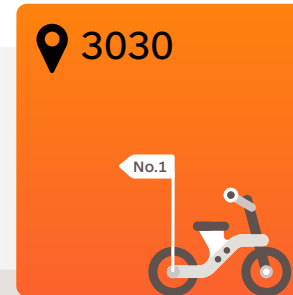
Specialty Food & Liquor

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## 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.



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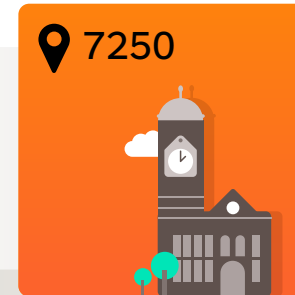
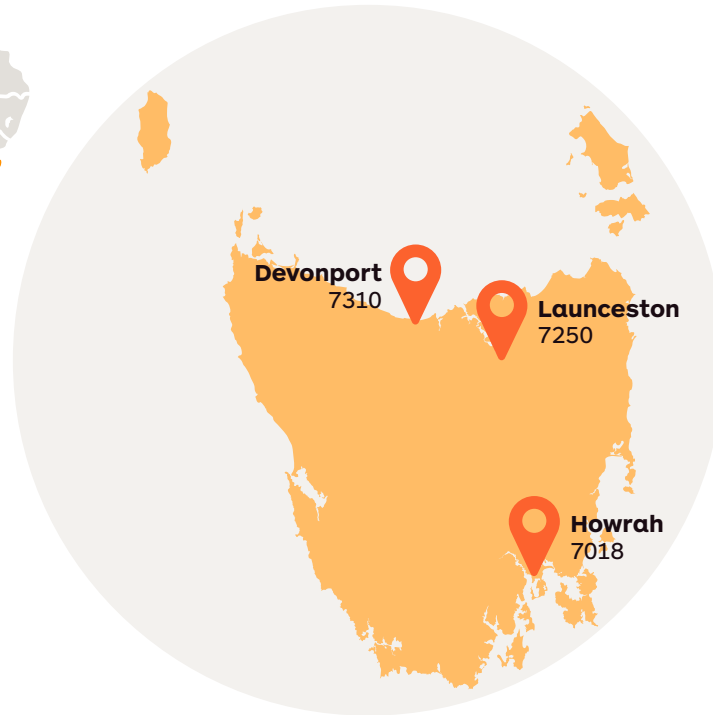
Specialty Food & Liquor

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## 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.



#### Spotlight:

#### Launceston

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.



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## 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

7.4



**Mount Duneed**  
VIC 3217

4.4



**Williams Landing**  
VIC 3027

3.2



**Currie**  
TAS 7256

5.3



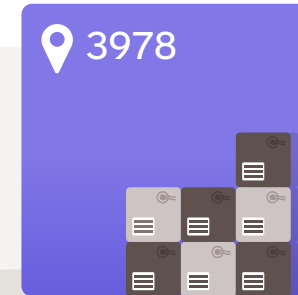
**Whitemark**  
TAS 7255

4.4



**VIC**  
parcels per household

**TAS**  
parcels per household



### 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

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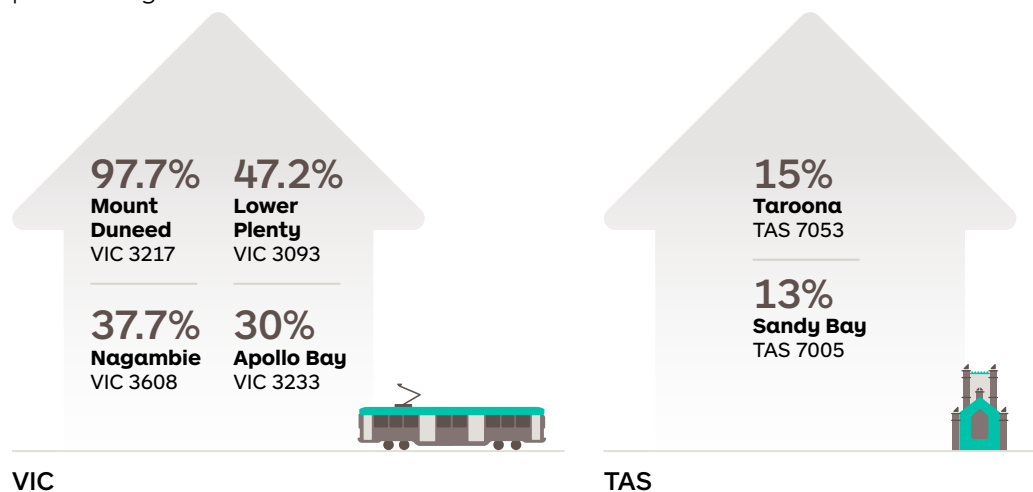
Specialty Food & Liquor

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## 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.



#### 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.



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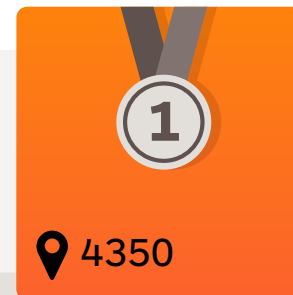
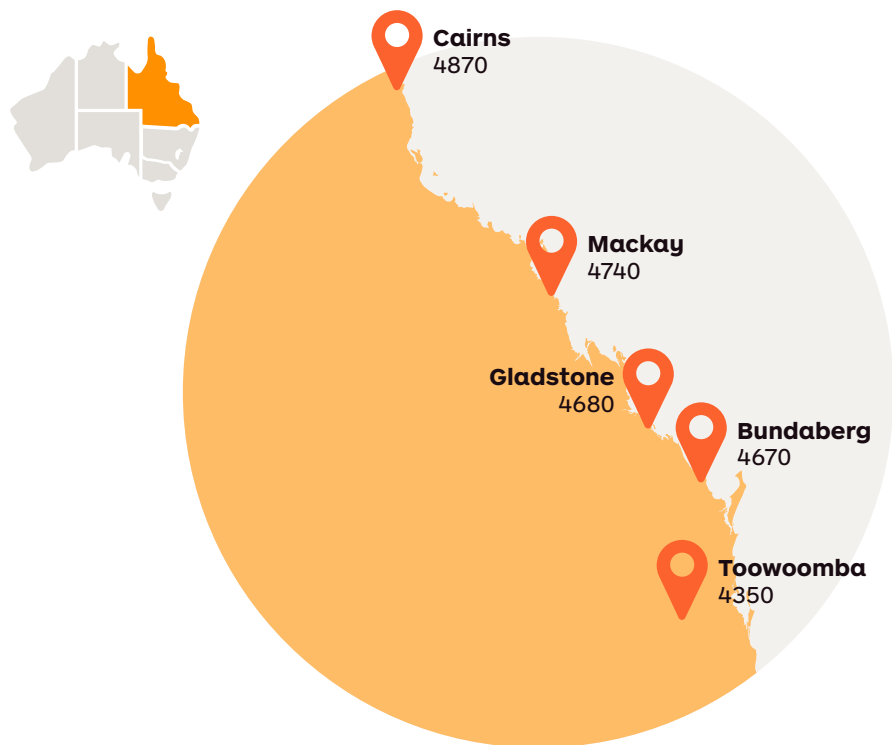
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## Department & Variety Stores QLD

### 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).



### Department & Variety Stores

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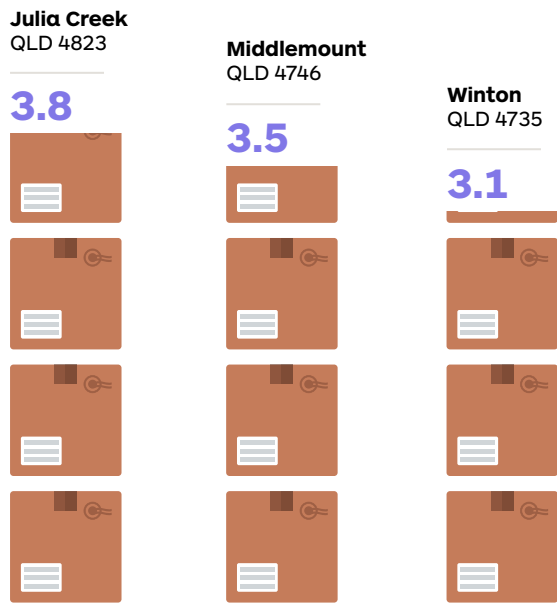
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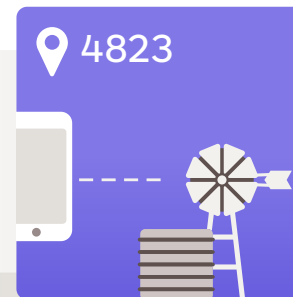
## Department & Variety Stores QLD

### 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.



QLD parcels per household



### 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.



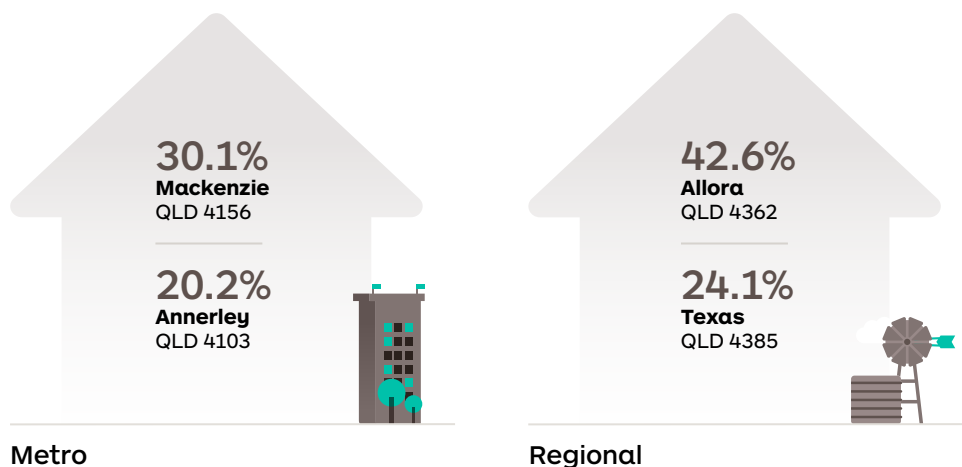
## Department & Variety Stores

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## 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.



#### 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.





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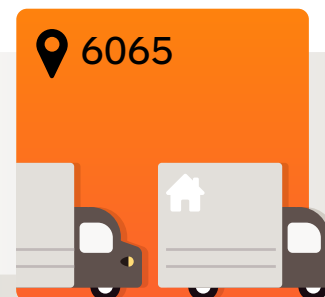
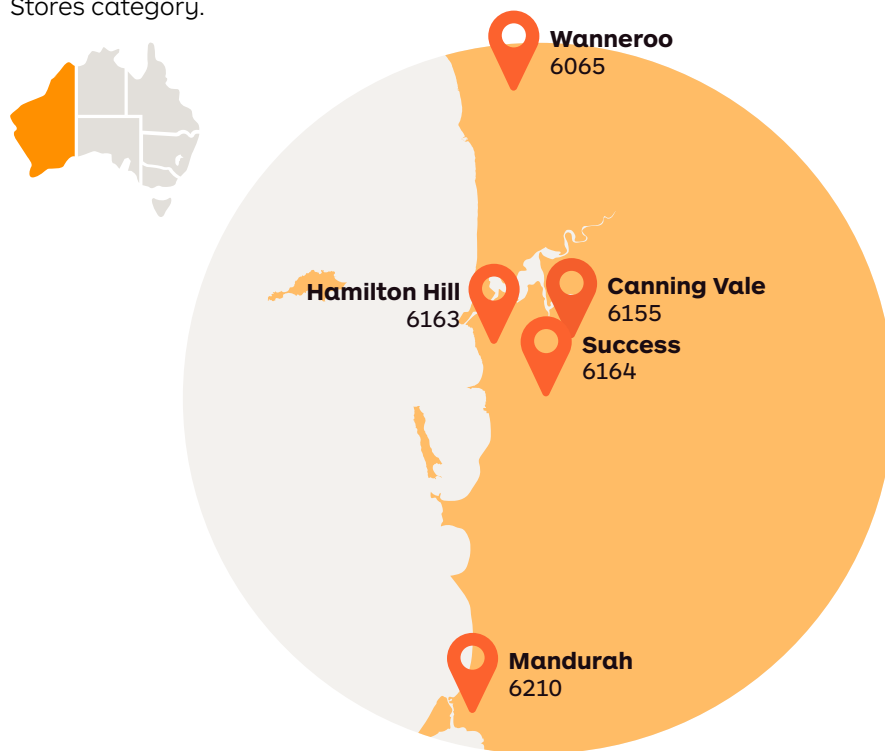
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## Department & Variety Stores WA/SA/NT

### 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.



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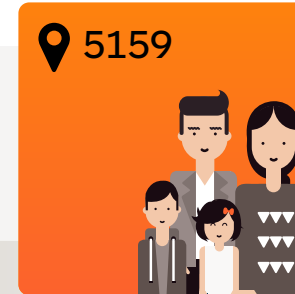
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## Department & Variety Stores WA/SA/NT

### 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%.



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## 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.

**Onslow**  
WA 6710

**6.2**



**Paraburdoo**  
WA 6754

**5.1**



**Exmouth**  
WA 6707

**4.7**



**Jabiru**  
NT 0886

**4.5**



**Cowell**  
SA 5602

**3.2**



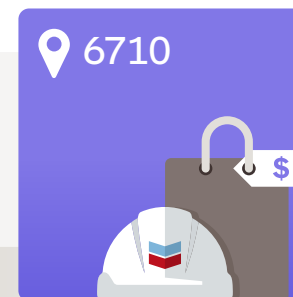
**Cooper Pedy**  
SA 5723

**3**



**WA**  
parcels per household

**NT/SA**  
parcels per household



### 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.



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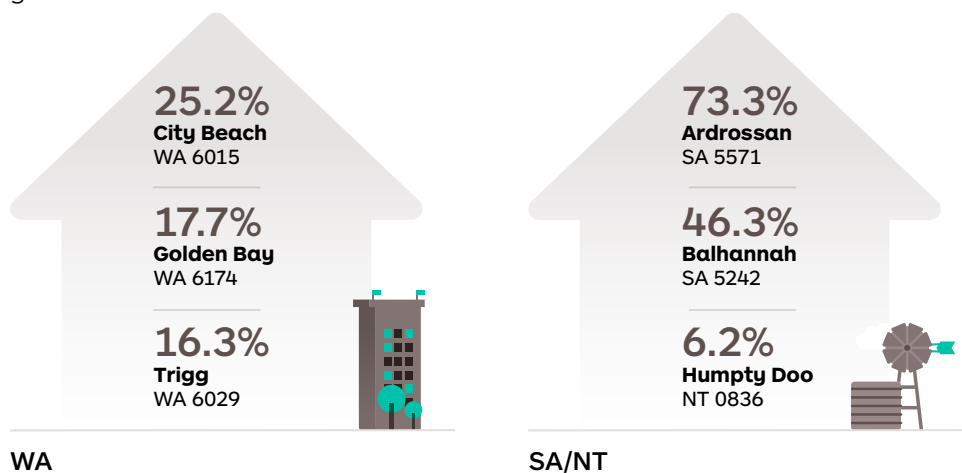
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## Department & Variety Stores WA/SA/NT

### Fastest-growing locations

Overall, Western Australia experienced a slight decline in the Department & Variety Stores category, however there were pockets of growth across the state.



#### 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.



## Future growth

Trigg and Currambine, in Perth's north, will be the big movers in Western Australia in the coming years for department and variety store items. Situated 13km north of the city, the area is in high demand, with median house prices recently topping \$1 million. There are now 24/7 Parcel Lockers in the area too – at the Joondalup shopping centre.



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## Fashion overview

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.



**Top buying locations\***

- Surry Hills NSW
- Liverpool NSW
- Toowoomba QLD

\* top locations for online purchases

**Top buyers by household\***

- Clyde North VIC
- Onslow WA
- Mount Duneed VIC

\* top locations for online purchases (parcels) per household

**Top growth locations\***

- Mount Duneed VIC
- Lightning Ridge NSW
- Haberfield NSW

\* top locations by year-on-year growth in online purchases

**Future growth\***

- Brunswick VIC
- Engadine NSW
- Craigieburn VIC

\* our predictions for future growth



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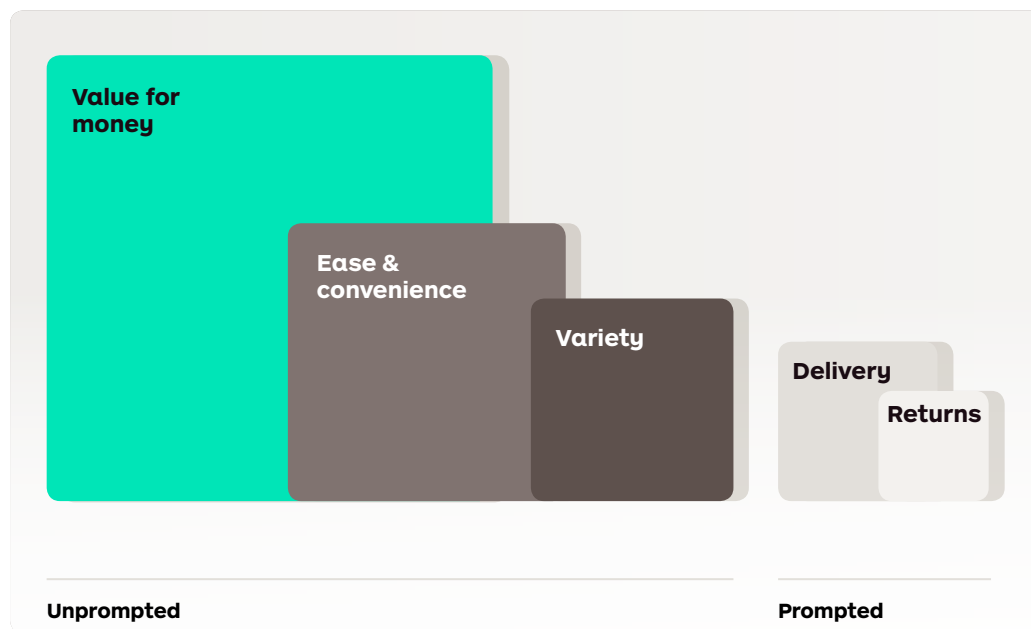
 Christmas

## 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.

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<sup>5</sup>.

### Drivers of eCommerce fashion



<sup>5</sup> Australia Post independent qualitative research undertaken by RealityCheck research, March 2015



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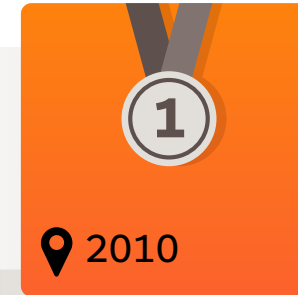
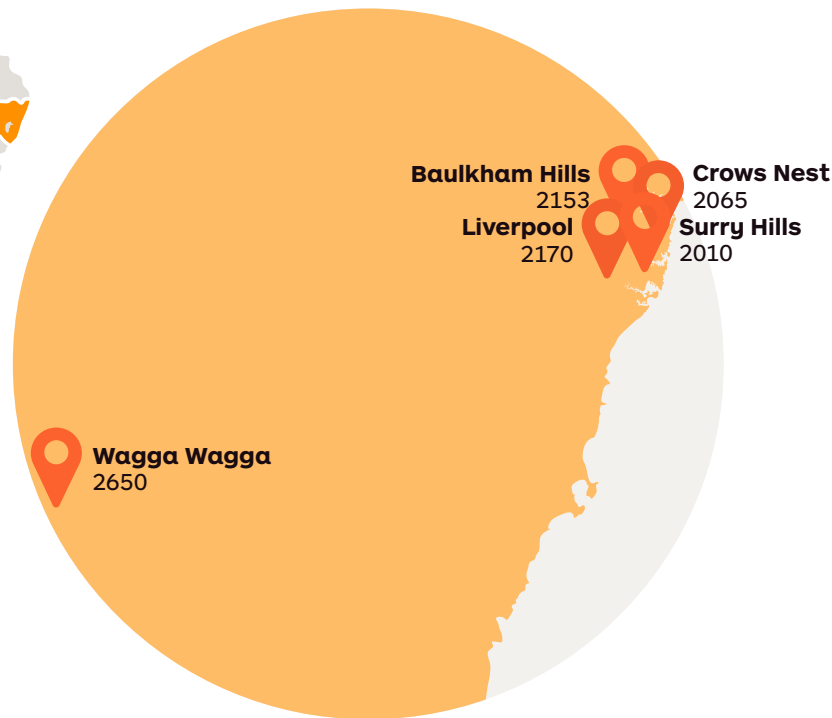
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## Fashion NSW/ACT

### 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.





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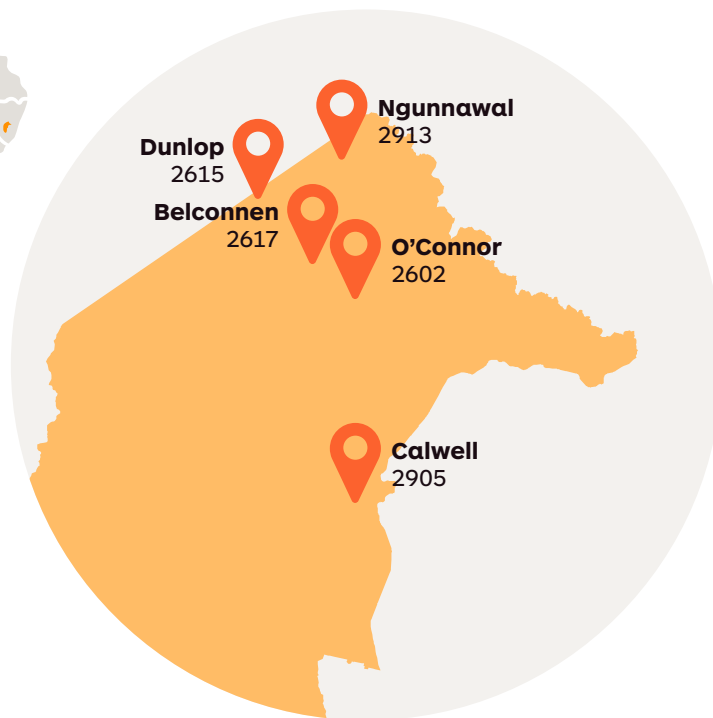
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## Fashion NSW/ACT

### Top 5 buying locations in ACT

Dunlop ranks first in the ACT for buying fashion online.



Household median weekly income, Dunlop **\$1,782**

National median **\$1,234**



### 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.



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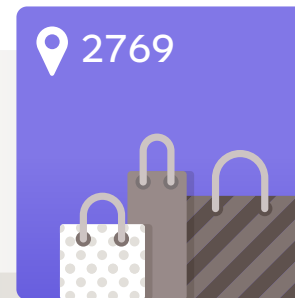
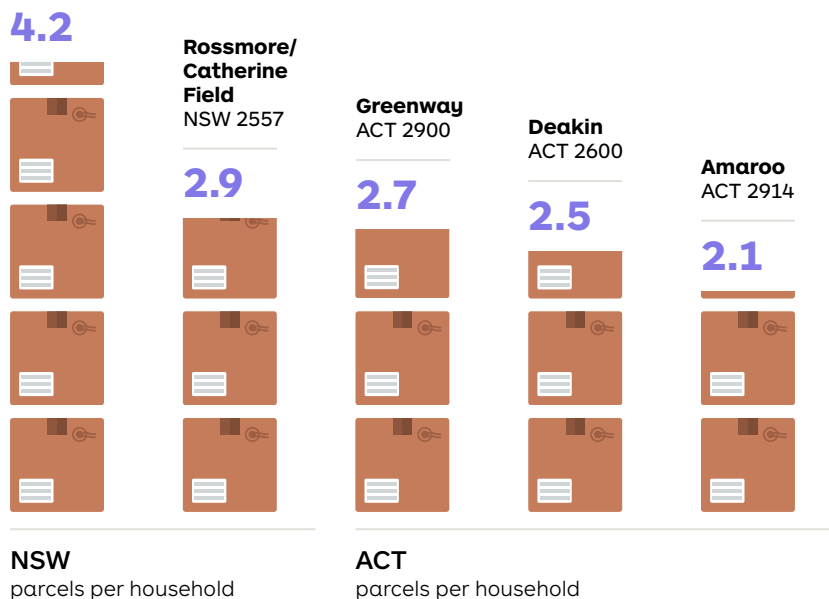
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## Fashion NSW/ACT

### 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.

**The Ponds**  
NSW 2769



#### 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.



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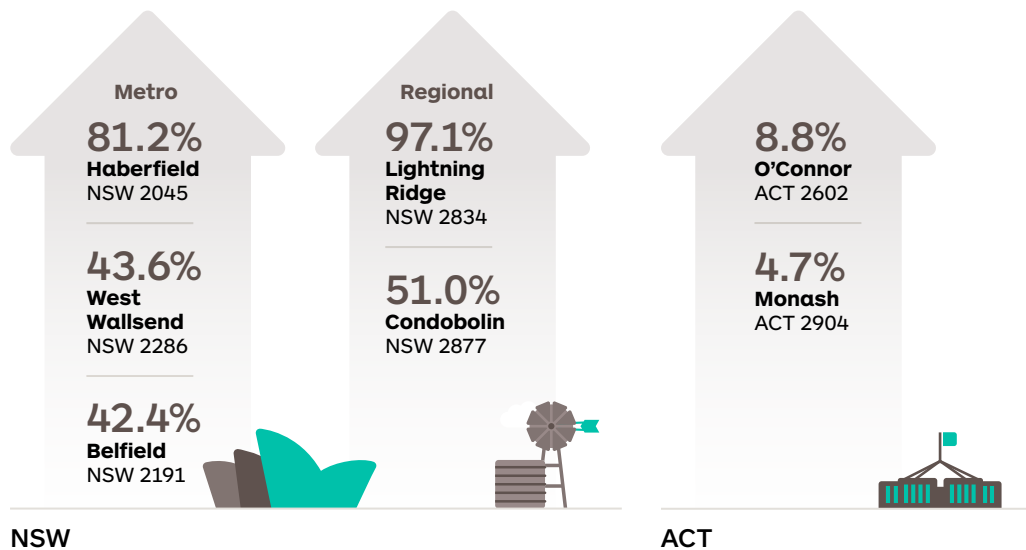
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## Fashion NSW/ACT

### Fastest-growing locations

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



#### 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.



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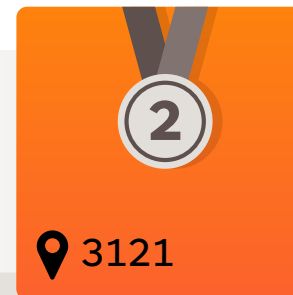
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## Fashion VIC/TAS

### 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.



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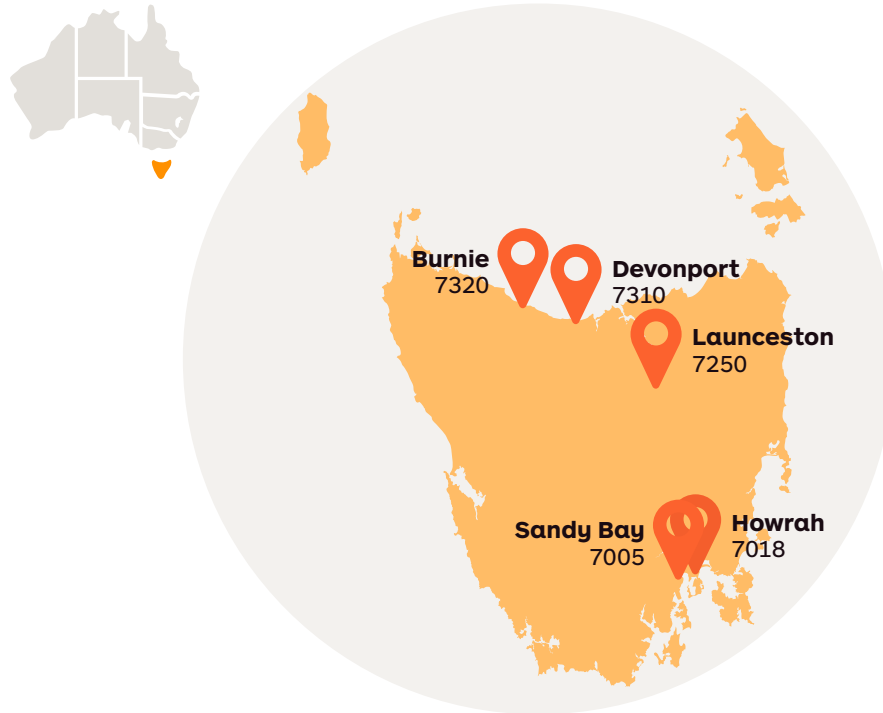
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## Fashion VIC/TAS

### 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.



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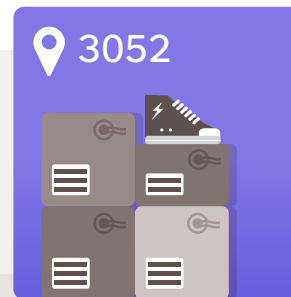
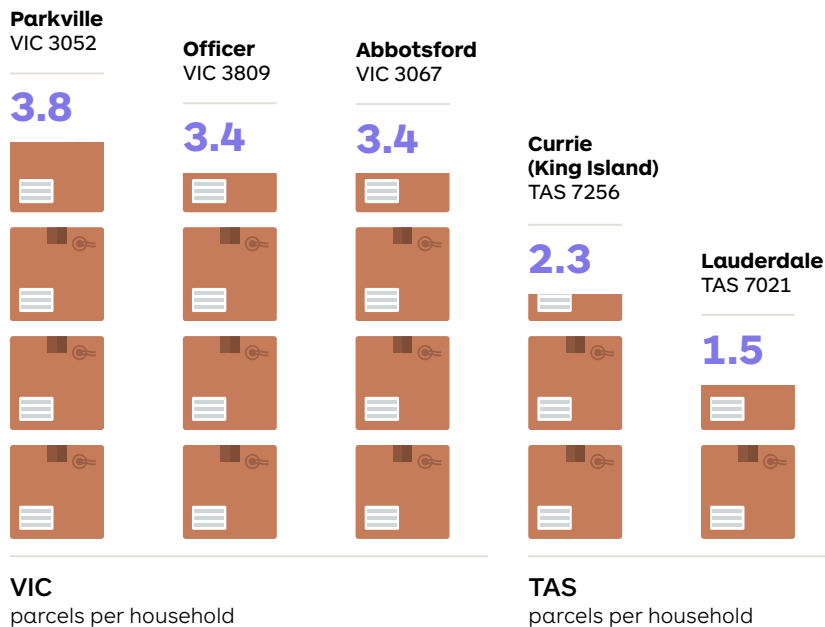
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## Fashion VIC/TAS

### Top eCommerce buyers by household location

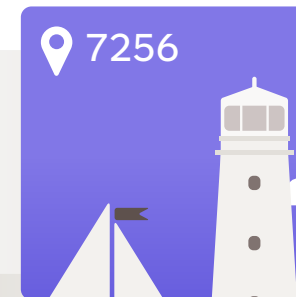
Parkville was third for fashion purchases per household in Victoria, behind Clyde North and Mount Duneed, recording volumes three times above the state average.



#### 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.



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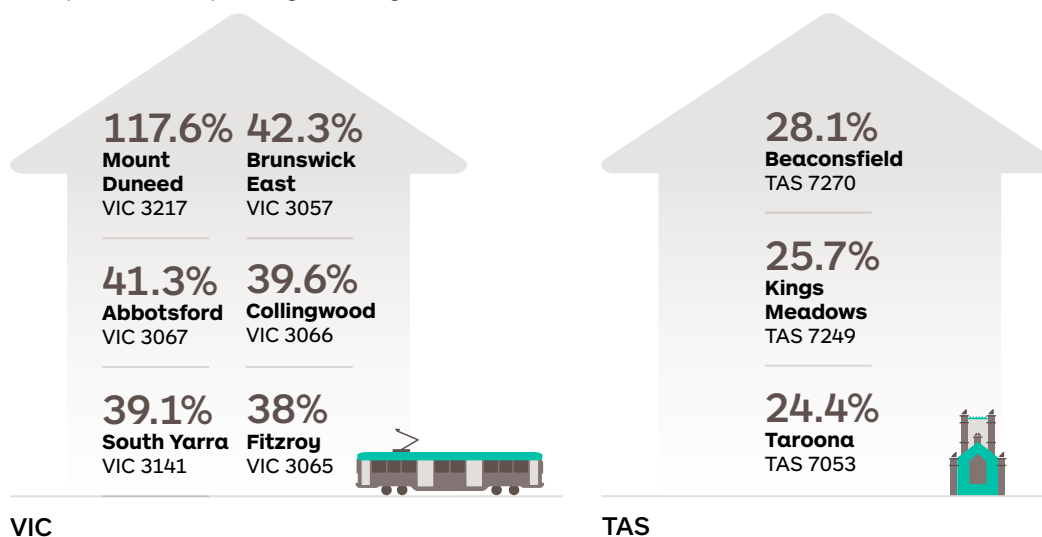
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## Fashion VIC/TAS

### Fastest-growing locations

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



### 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.



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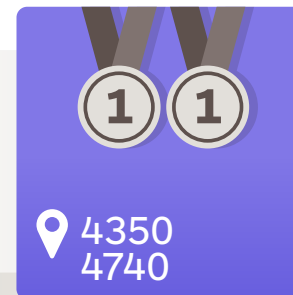
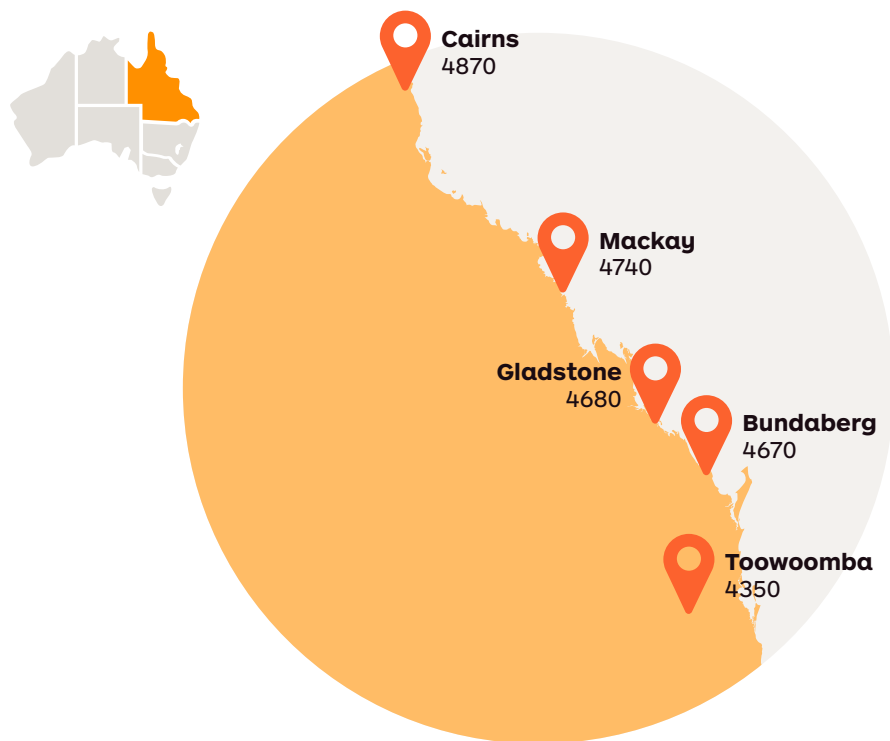
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## Fashion QLD

### 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.





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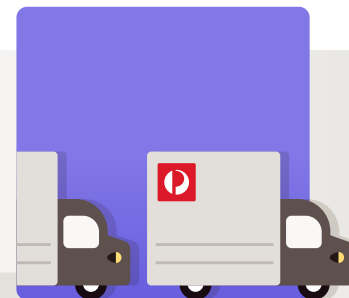
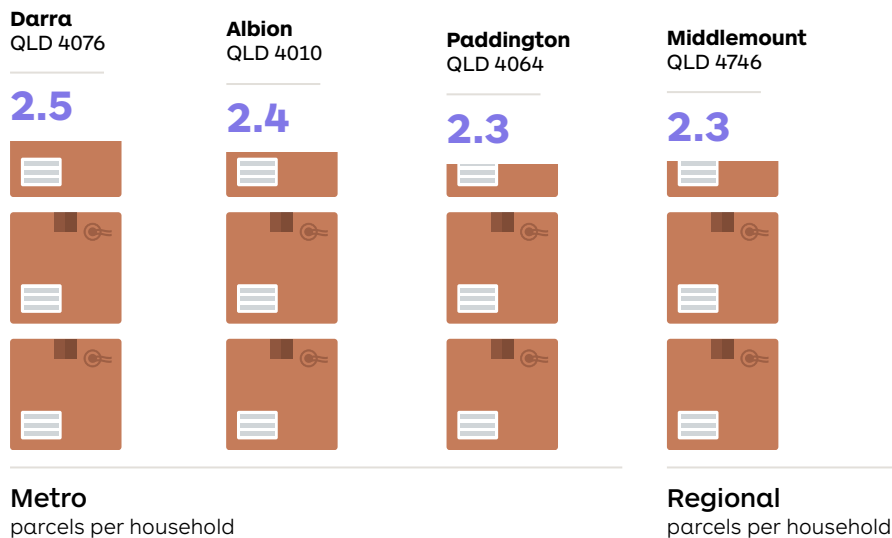
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## Fashion QLD

### Top eCommerce buyers by household location

Darra was the number one location for purchases per household in Queensland, doubling the average state volume.



### Spotlight:

#### Ipswich Motorway

The Ipswich Motorway, between Rocklea and Darra, is one of the busiest freight corridors in Queensland. Our drivers spent a lot of time commuting there last year, making an average of 2.5 fashion deliveries to local households – the most for any area in the state.



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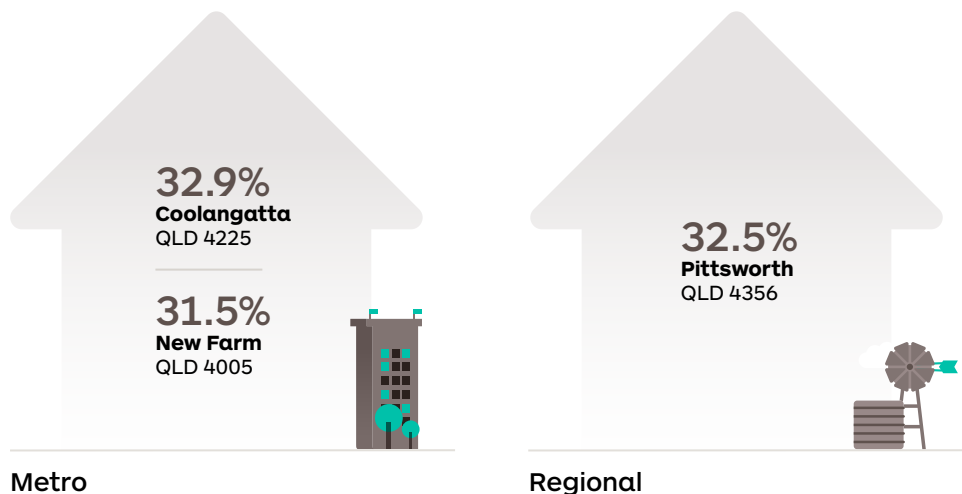
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## Fashion QLD

### Fastest-growing locations

Queensland performed well in the Fashion category, with purchases up 10.5% year-on-year.



Metro

Regional

#### Spotlight: Coolangatta

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%.



## Future growth

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.



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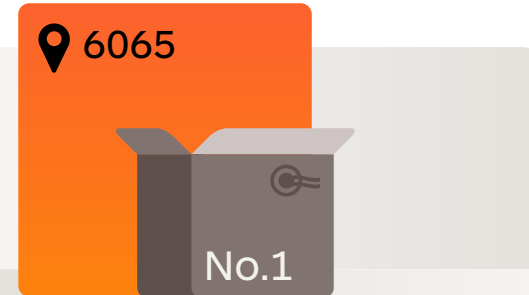
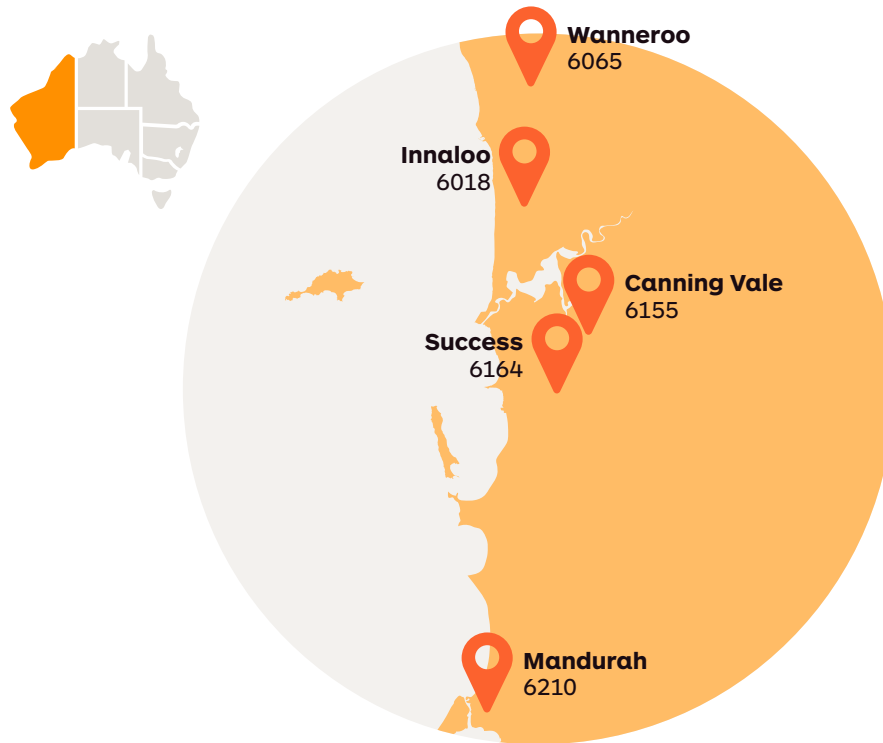
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## Fashion WA/SA/NT

### 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.



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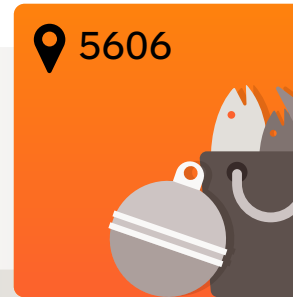
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## Fashion WA/SA/NT

### 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.



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## 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

**4.6**



**West Perth**  
WA 6005

**3.4**



**Port Hedland**  
WA 6721

**3.3**



**Cleve**  
SA 5640

**3**



**Roxby Downs**  
SA 5725

**2.6**



**Kimba**  
SA 5641

**2.5**



**Stuart Park**  
NT 0820

**1.2**



**Rosebery**  
NT 0832

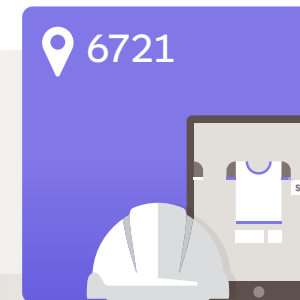
**1.2**



**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.



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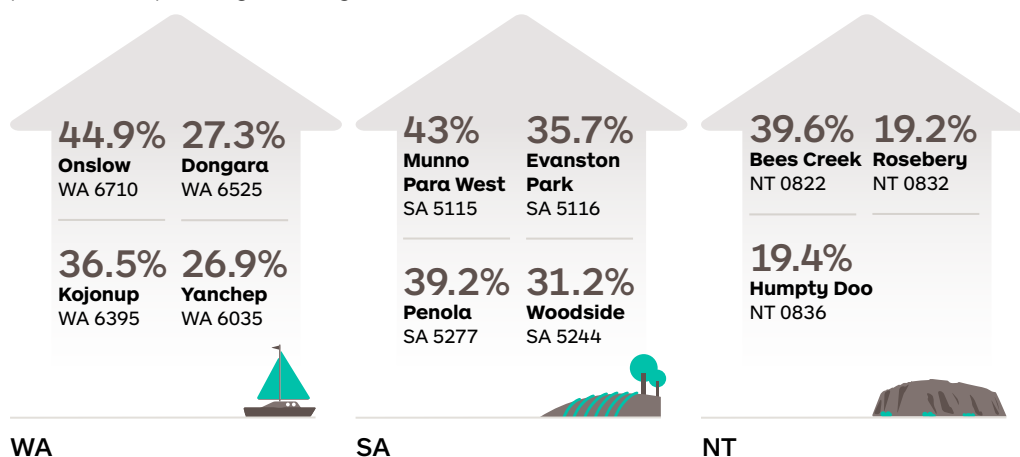
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## Fashion WA/SA/NT

### Fastest-growing locations

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



#### 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.



## 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.



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## 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 locations for online purchases

**Top buyers by household\***

- Springvale VIC
- Onslow WA
- Auburn NSW

\* top locations for online purchases (parcels) per household

**Top growth locations\***

- Springvale VIC
- Rockdale NSW
- Mile End SA

\* top locations by year-on-year growth in online purchases

**Future growth\***

- Doncaster VIC
- Epping NSW
- Clayton VIC

\* our predictions for future growth





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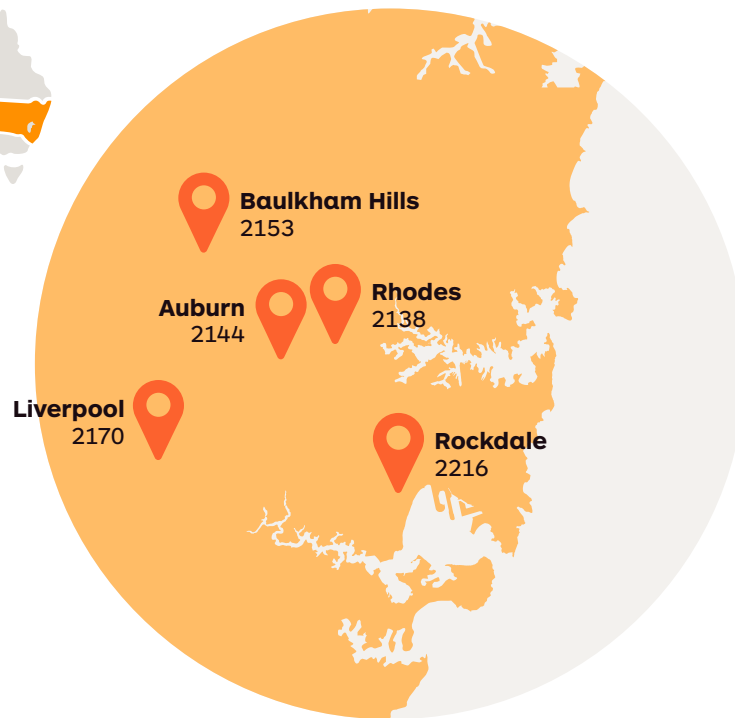
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## Health & Beauty NSW/ACT

### Top 5 buying locations in NSW

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



Chinese population, Auburn & Rhodes  
**18%+**



National  
**3.1%**

### 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.



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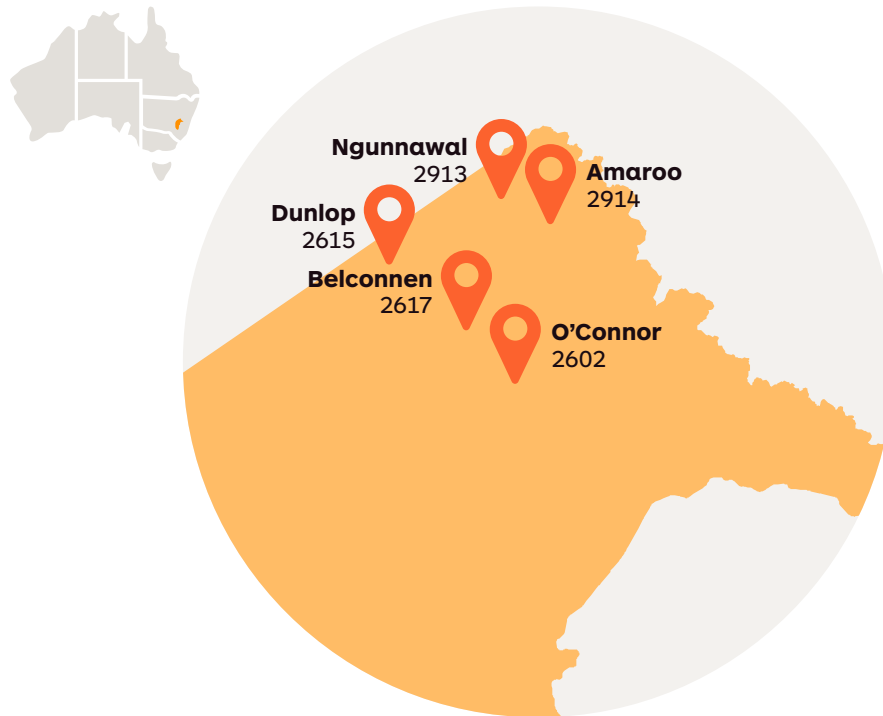
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## Health & Beauty NSW/ACT

### Top 5 buying locations in ACT

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



Household median weekly income, Belconnen  
**\$1,880**

National median  
**\$1,234**



### 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).



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## 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

**4.5**



**Rockdale**  
NSW 2216

**1.5**



**Rhodes**  
NSW 2138

**1.5**



**Bonner**  
ACT 2914

**0.9**



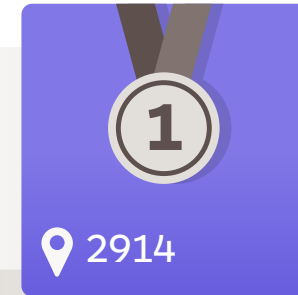
**Belconnen**  
ACT 2617

**0.6**



**NSW**  
parcels per household

**ACT**  
parcels per household



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.



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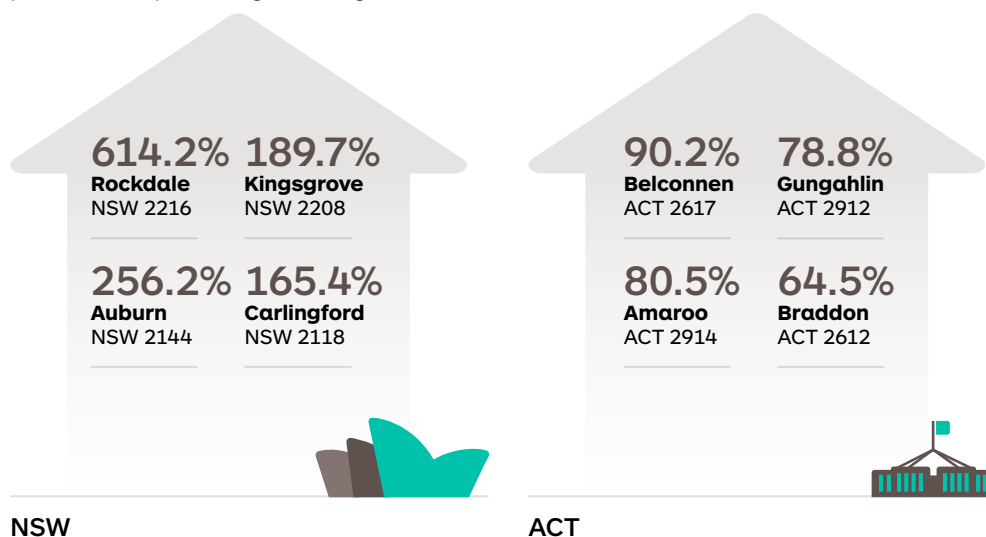
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## Health & Beauty NSW/ACT

### Fastest-growing locations

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



#### 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.



## 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.



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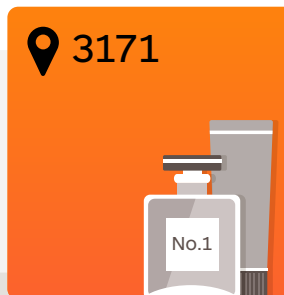
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## Health & Beauty VIC/TAS

### 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.



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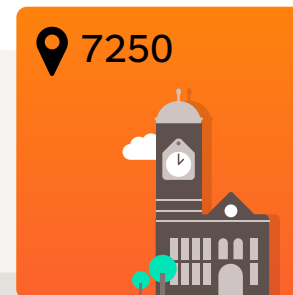
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## Health & Beauty VIC/TAS

### 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.



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## 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**



**VIC**  
parcels per household

**Blackburn**  
VIC 3130

**0.7**



**Devonport**  
TAS 7310

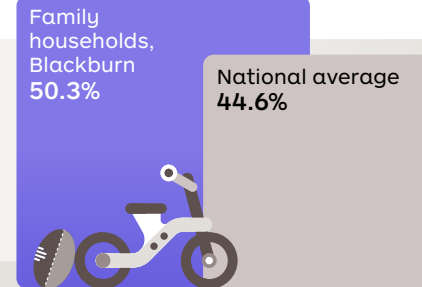
**0.4**



**TAS**  
parcels per household

**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%.



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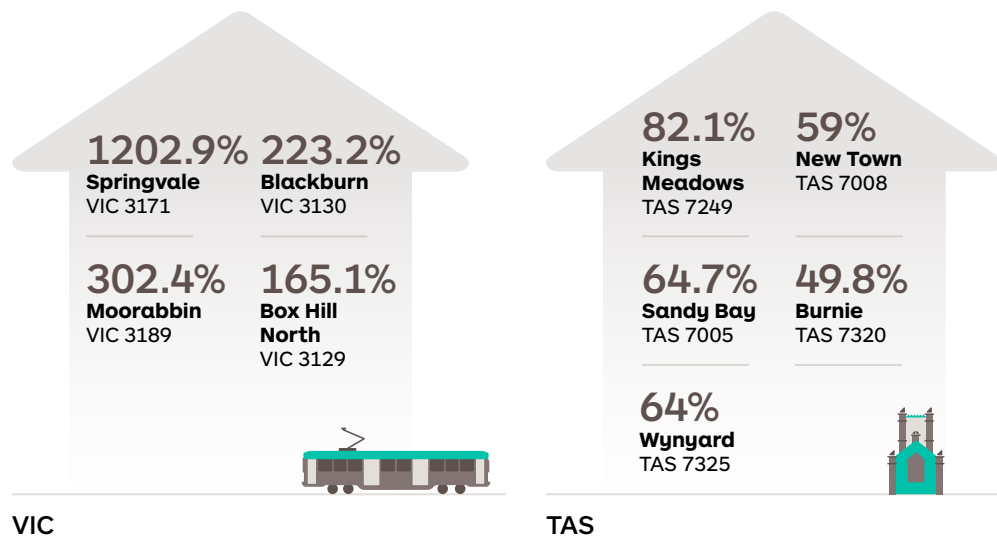
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## Health & Beauty VIC/TAS

### Fastest-growing locations

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



### 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.



## 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.





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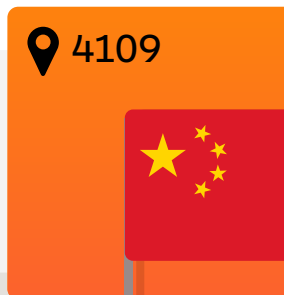
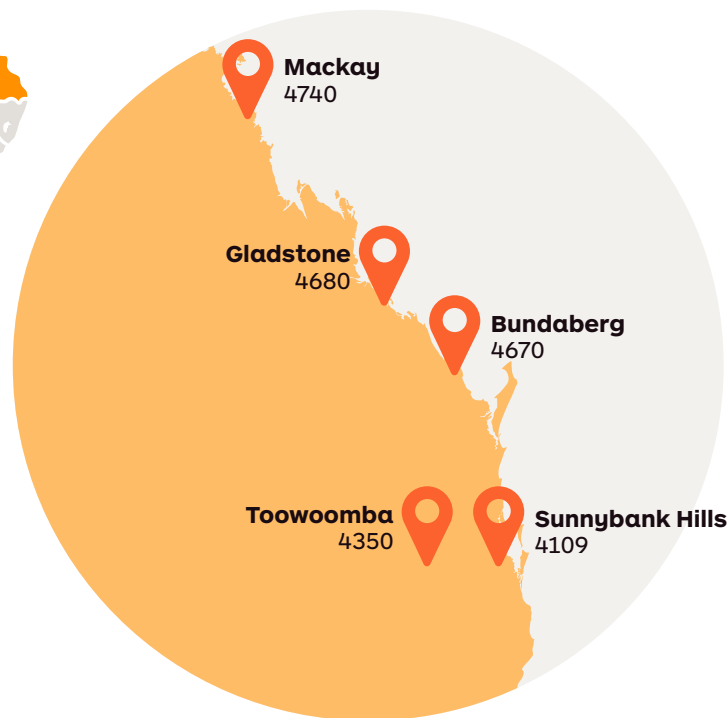
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## Health & Beauty QLD

### 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.



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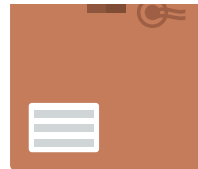
## Health & Beauty QLD

### Top eCommerce buyers by household location

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

**Longreach**  
QLD 4730

**0.9**



**Regional**  
parcels per household

**Coopers Plains**  
QLD 4108

**0.8**



**Metro**  
parcels per household

**Sunnybank Hills**  
QLD 4109

**0.6**



Median age, Longreach  
**33 years**

National median  
**37 years**



### 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.



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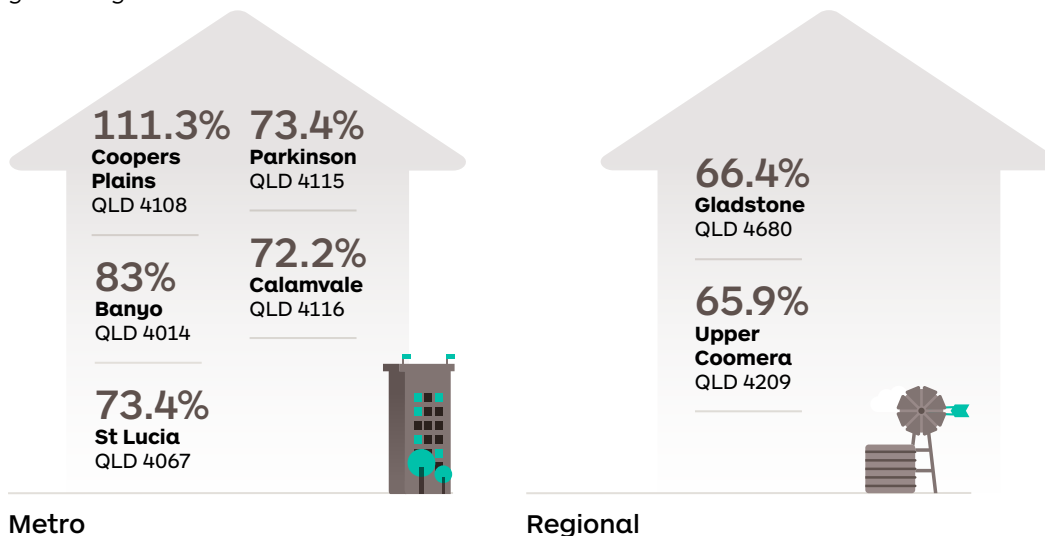
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## Health & Beauty QLD

### Fastest-growing locations

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



### 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.



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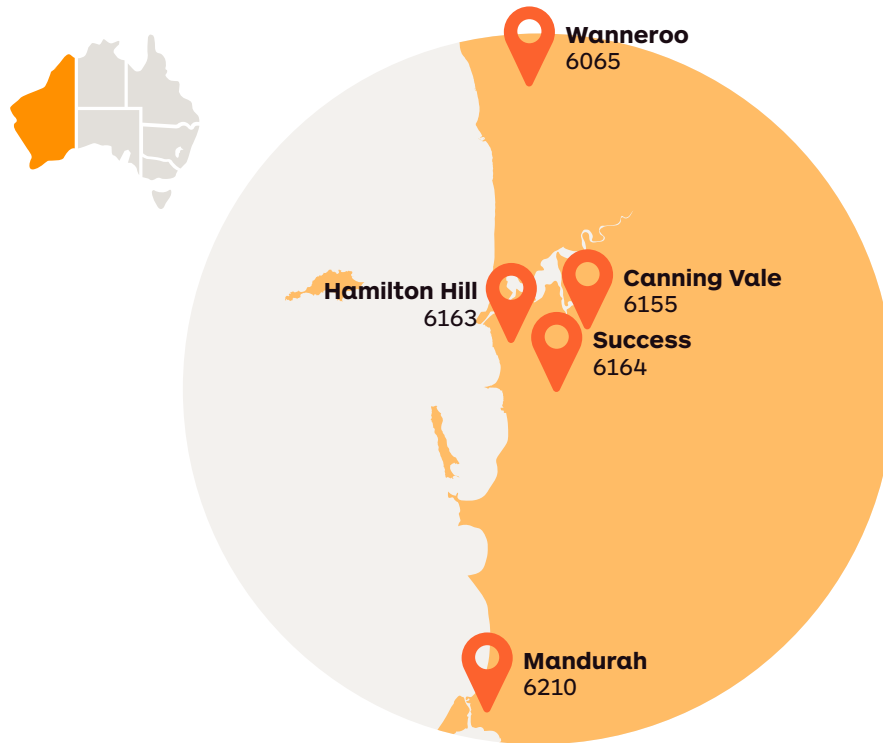
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## Health & Beauty WA/SA/NT

### Top 5 buying locations in WA

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



Median age, Mandurah  
43 years

National median  
37 years

43

### 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.



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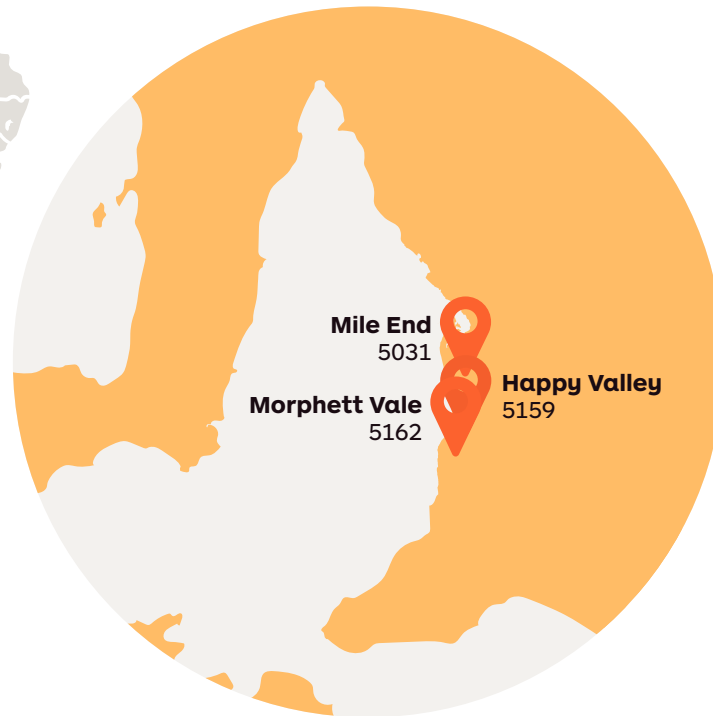
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## Health & Beauty WA/SA/NT

### Top 3 buying locations in SA

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



### Spotlight:

#### Mile End

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.



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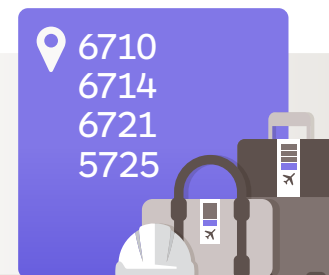
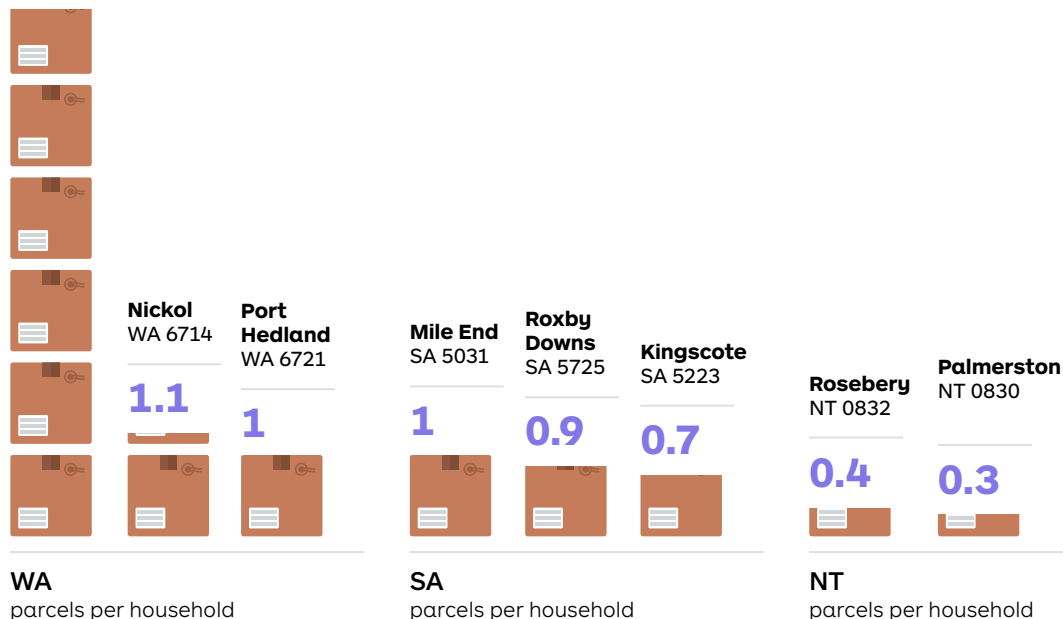
## Health & Beauty WA/SA/NT

### 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**



#### 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.



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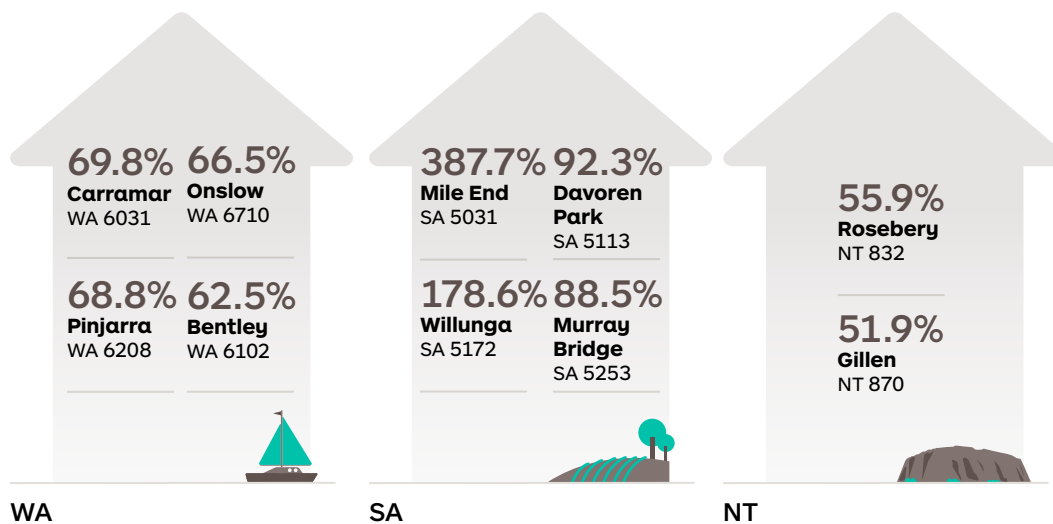
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## Health & Beauty WA/SA/NT

### Fastest-growing locations

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



#### 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.



## 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.



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## 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.



### Top buying locations\*

Point Cook VIC

Toowoomba QLD

Gosford NSW

\* top locations for online purchases

### Top buyers by household\*

Clyde North VIC

Deakin ACT

Greenway ACT

\* top locations for online purchases (parcels) per household

### Top growth locations\*

Haberfield NSW

Clyde North VIC

Whittlesea VIC

\* top locations by year-on-year growth in online purchases

### Future growth\*

Point Cook VIC

Craigieburn VIC

Baldivis WA

\* our predictions for future growth



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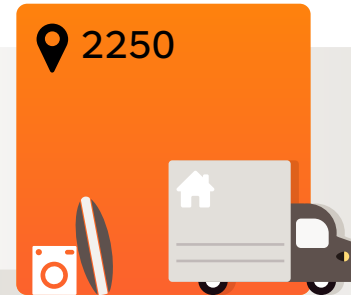
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## Homewares & Appliances NSW/ACT

### Top 5 buying locations in NSW

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



#### 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.



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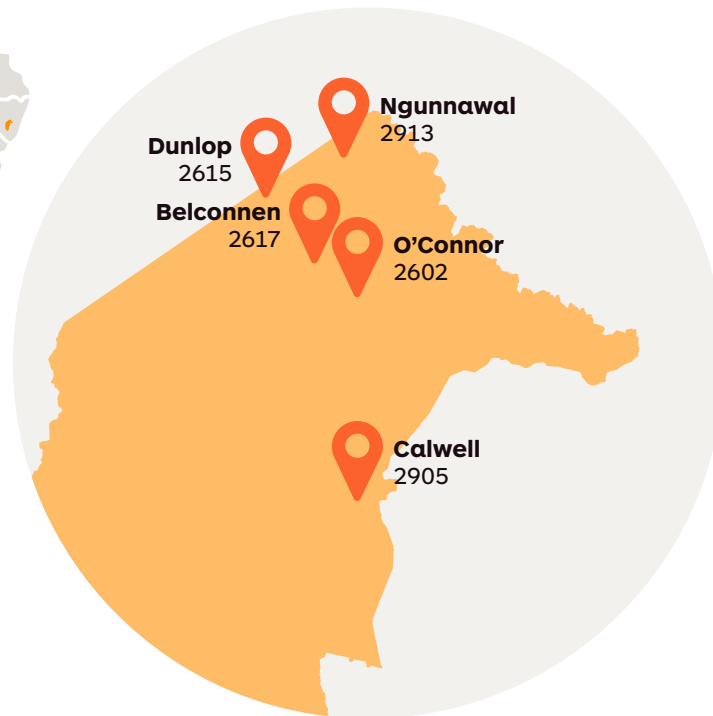
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## Homewares & Appliances NSW/ACT

### Top 5 buying locations in ACT

Dunlop ranks first in the ACT for online purchases in the Homewares & Appliances category.



Median weekly family income, O'Connor  
**\$2,631**

National median  
**\$1,481**



### 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.



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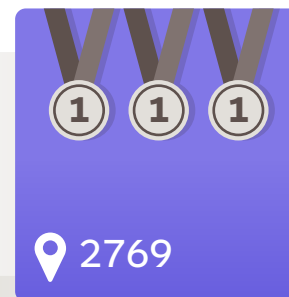
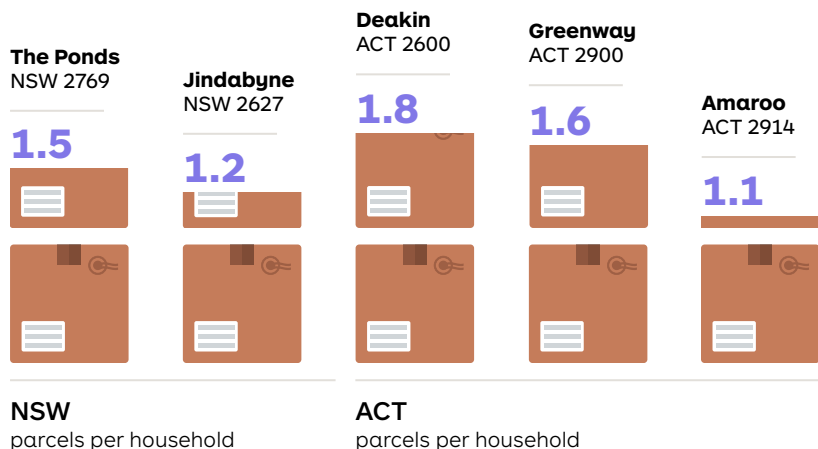
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## Homewares & Appliances NSW/ACT

### Top eCommerce buyers by household location

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

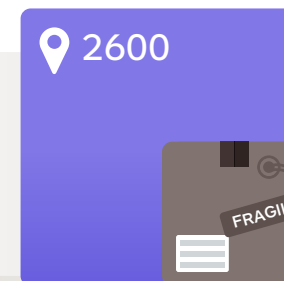


#### Spotlight:

##### 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.

Jindabyne, known as a popular snow holiday destination, appears second on our list.



#### 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?



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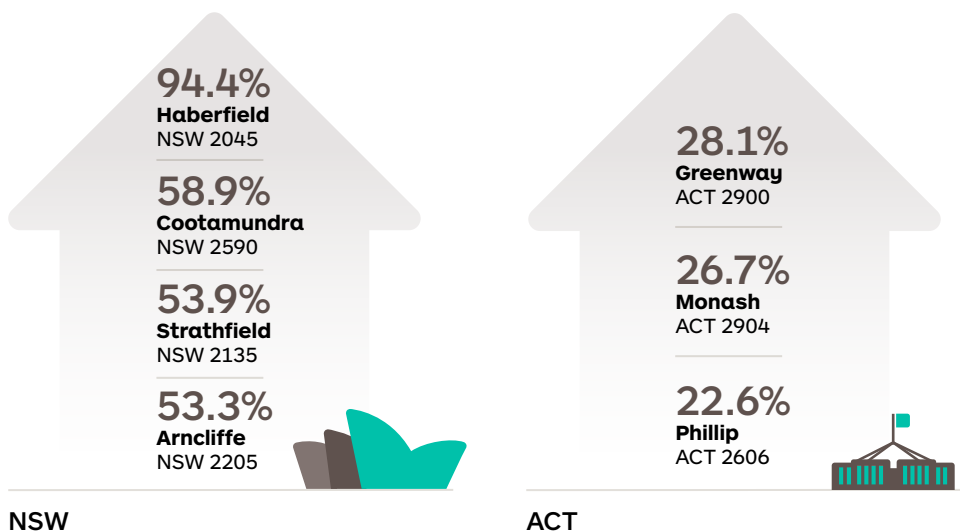
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## Homewares & Appliances NSW/ACT

### 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.



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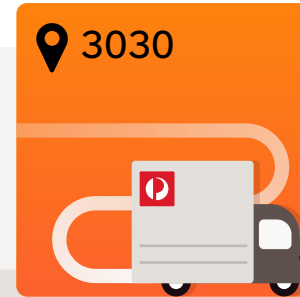
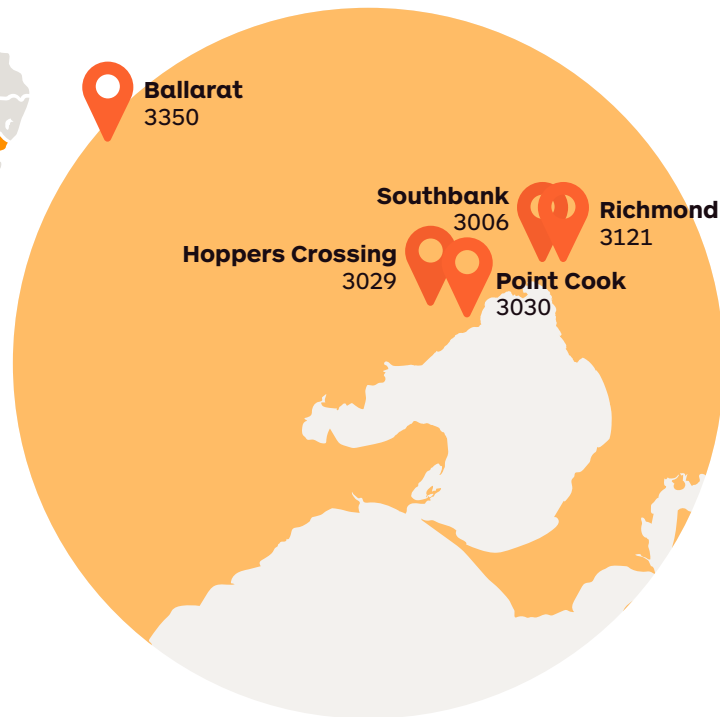
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## Homewares & Appliances VIC/TAS

### 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.



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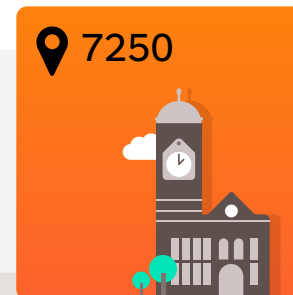
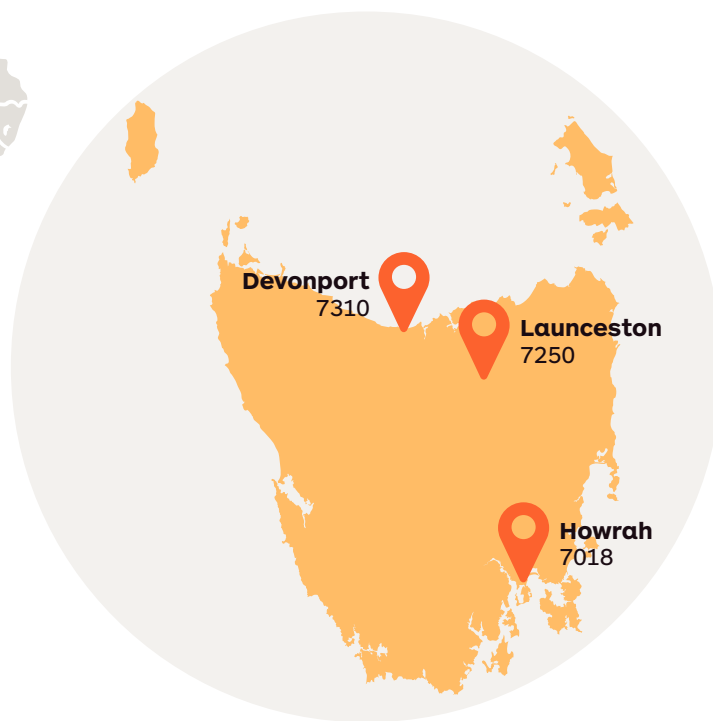
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## Homewares & Appliances VIC/TAS

### 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.



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## Homewares & Appliances VIC/TAS

### Top eCommerce buyers by household location

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

**Clyde North**  
VIC 3978

2



**Abbotsford**  
VIC 3067

1.5



**Parkville**  
VIC 3052

1.4



**St Helens**  
TAS 7216

0.7



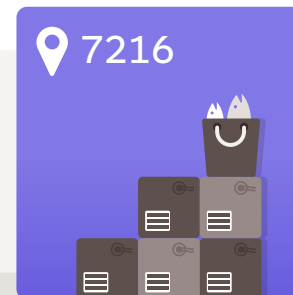
**Acton Park**  
TAS 7170

0.7



**VIC**  
parcels per household

**TAS**  
parcels per household



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.





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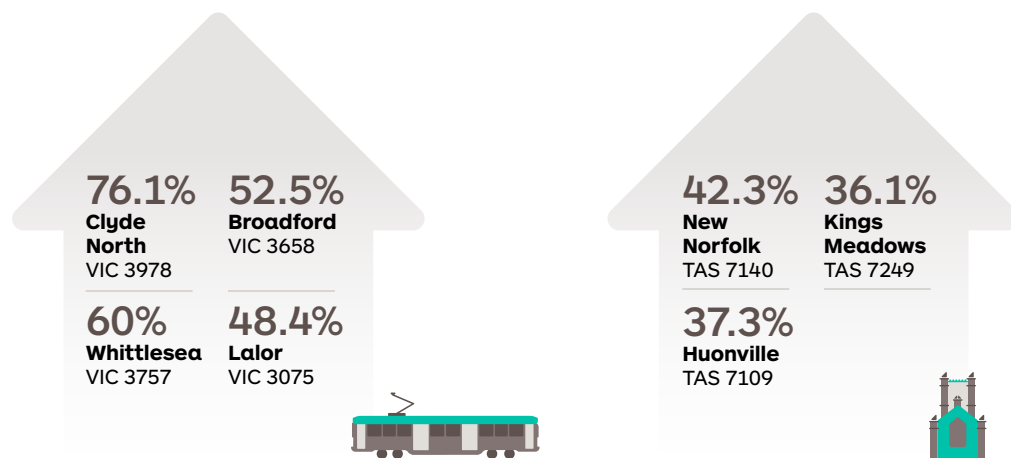
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## Homewares & Appliances VIC/TAS

### Fastest-growing locations

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



VIC

TAS

### 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.



## 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.



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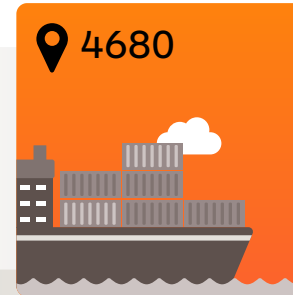
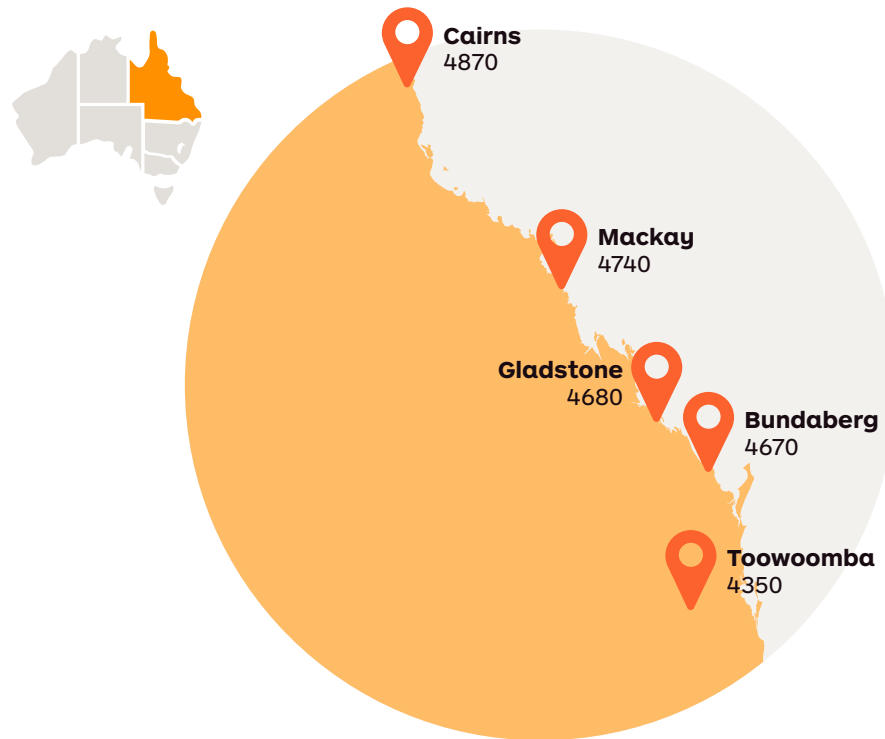
Specialty Food & Liquor

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## 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.



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## Homewares & Appliances QLD

### Top eCommerce buyers by household location

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

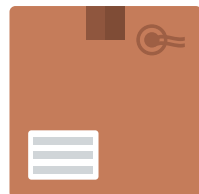
**Weipa**  
QLD 4874

**1.2**



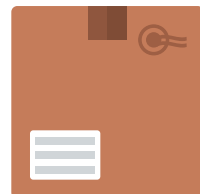
**Paddington**  
QLD 4064

**1.1**

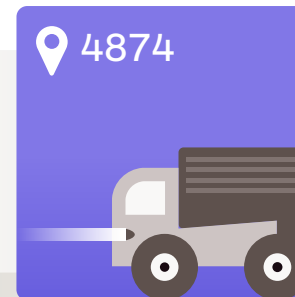


**Wongaling Beach**  
QLD 4852

**1**



**QLD**  
parcels per household



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.



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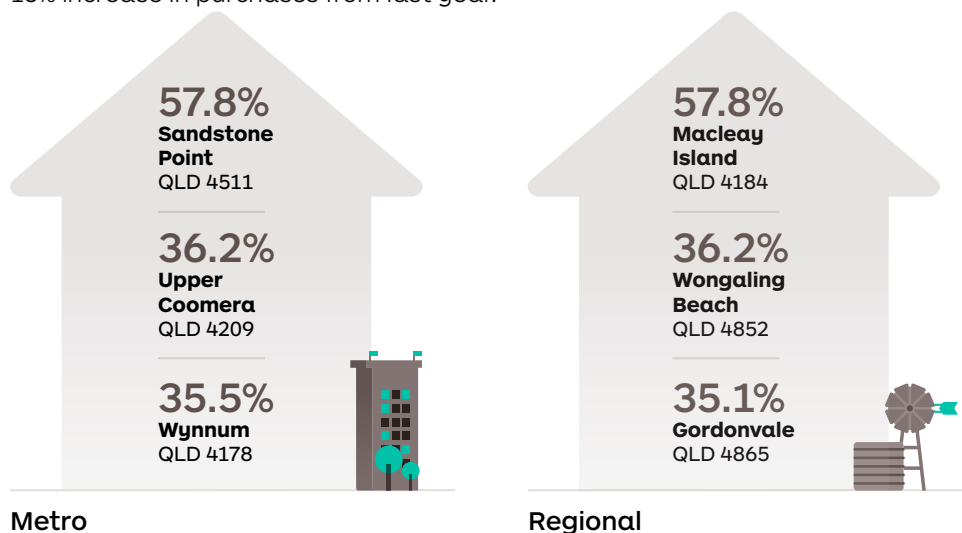
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## Homewares & Appliances QLD

### Fastest-growing locations

Queensland's performance in the Homewares & Appliances category was strong, with a 16% increase in purchases from last year.



### 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.



## 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.



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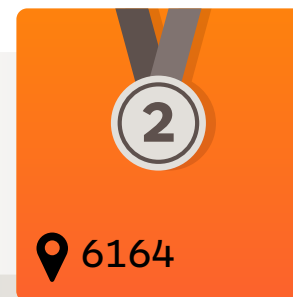
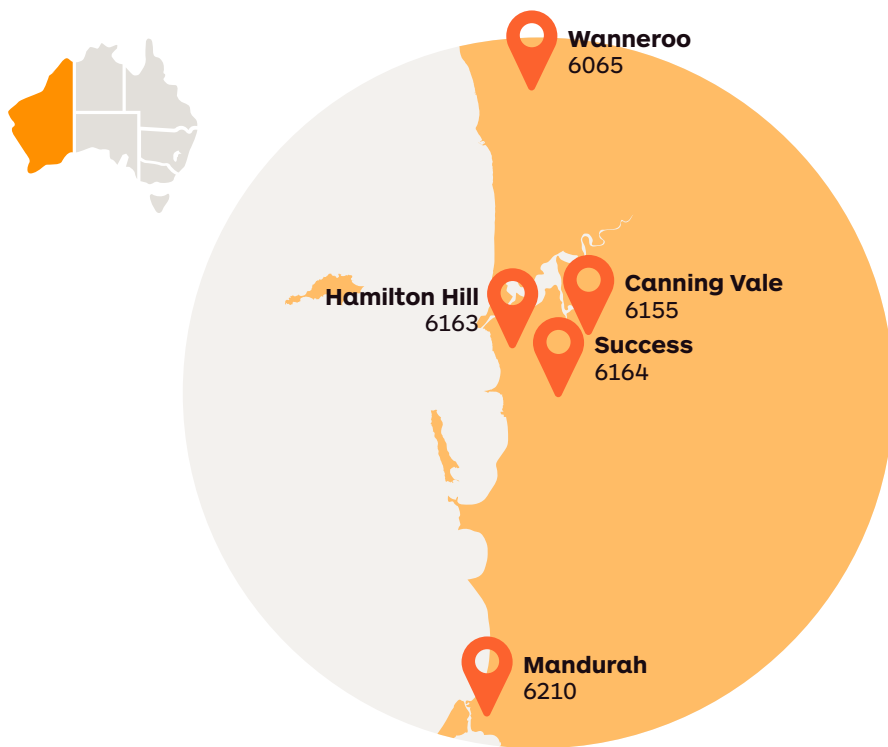
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## Homewares & Appliances WA/SA/NT

### 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.



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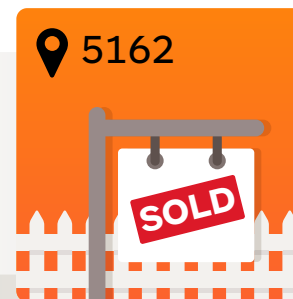
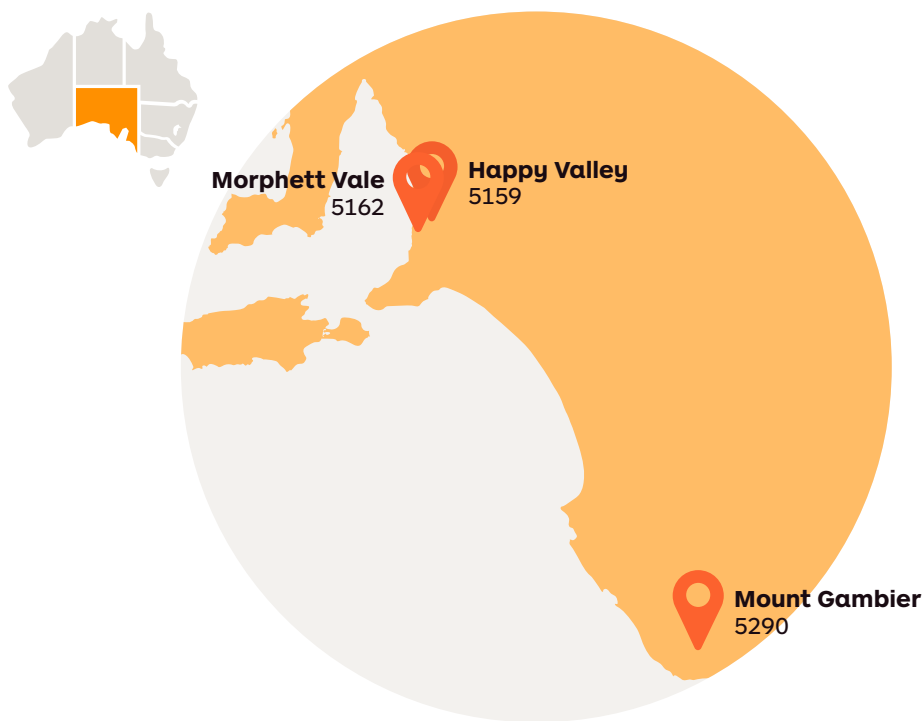
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## Homewares & Appliances WA/SA/NT

### Top 3 buying locations in SA

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



Spotlight:

#### Morphett Vale

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.



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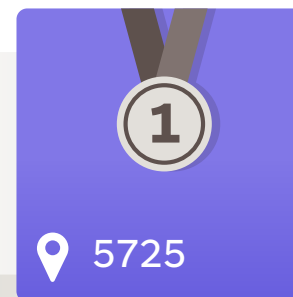
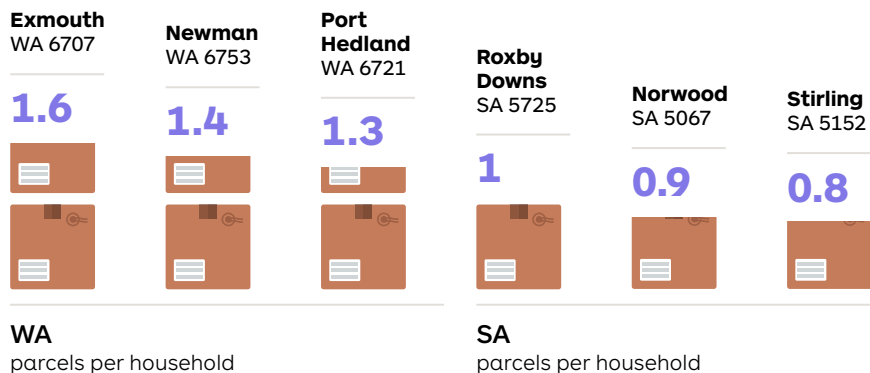
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## Homewares & Appliances WA/SA/NT

### Top eCommerce buyers by household location

Exmouth recorded purchases three times above the state average for purchases per household in Western Australia.



#### 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.



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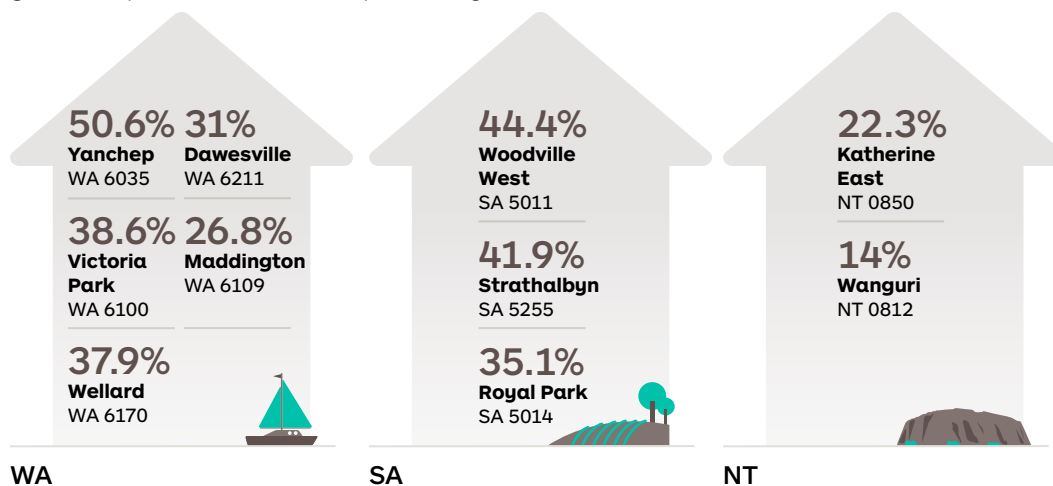
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## Homewares & Appliances WA/SA/NT

### 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.





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## 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



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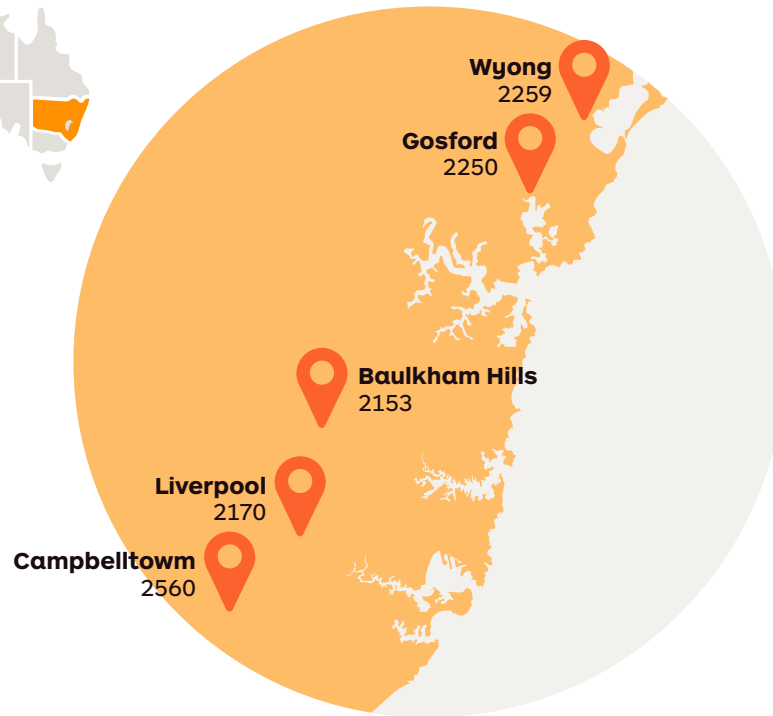
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## Media NSW/ACT

### Top 5 buying locations in NSW

Liverpool ranks third in the country for online media purchases.



Family households, Campbelltown **78.1%**

National average **71.5%**



### 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).



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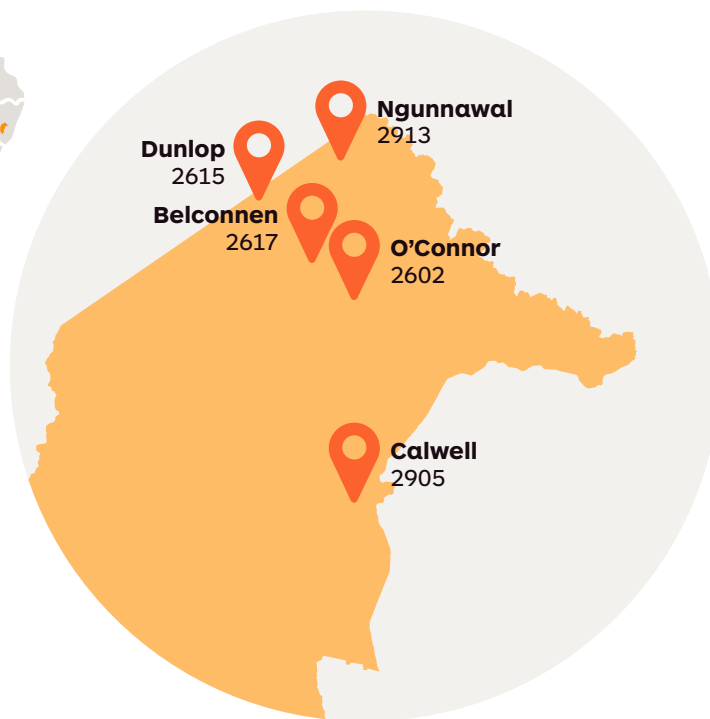
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## Media NSW/ACT

### Top 5 buying locations in ACT

Dunlop ranks first in the ACT for buying media online.



Median weekly household income, Ngunnawal  
**\$2,046**

National median  
**\$1,234**



### 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.



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## 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.

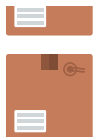
#### The Ponds NSW 2769

2.1



#### Rooty Hill NSW 2766

1.3



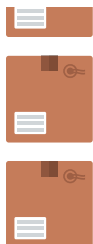
#### Rossmore NSW 2557

1.2



#### Greenway ACT 2900

2.3



#### Deakin ACT 2600

1.4



#### Kingston ACT 2604

0.9



#### NSW

parcels per household

#### ACT

parcels per household

Family households, Rossmore 87.3%

National average 71.5%



### 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%.



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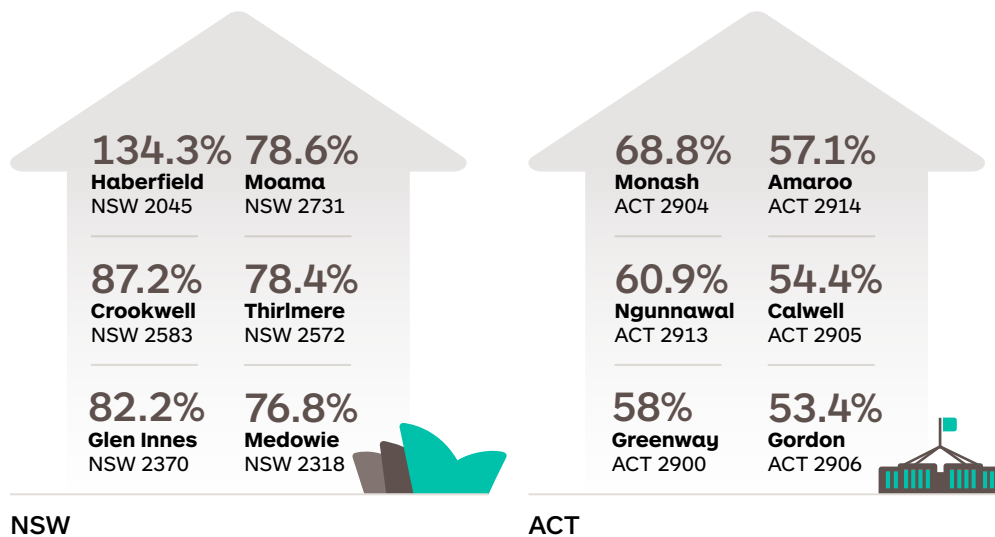
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## Media NSW/ACT

### 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.



### 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.



## 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.



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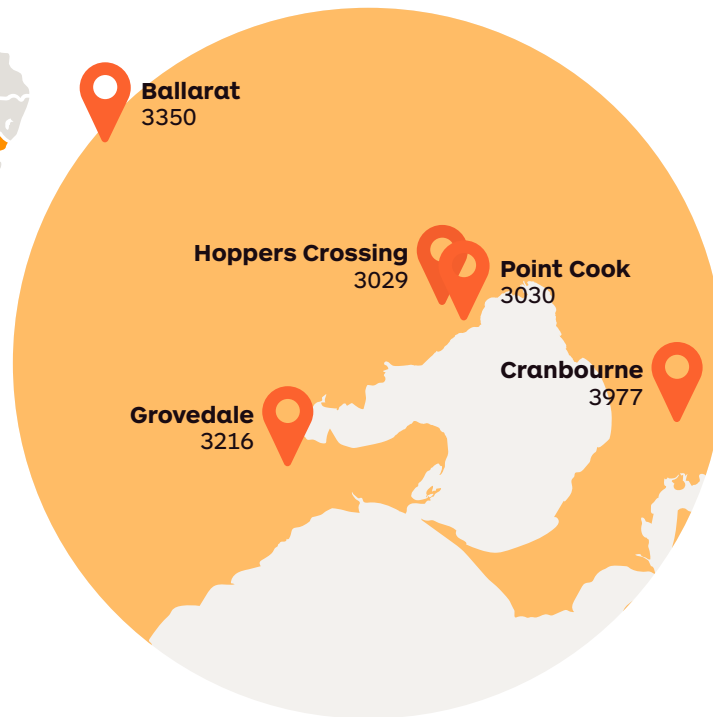
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## Media VIC/TAS

### 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.



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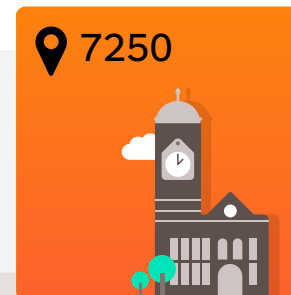
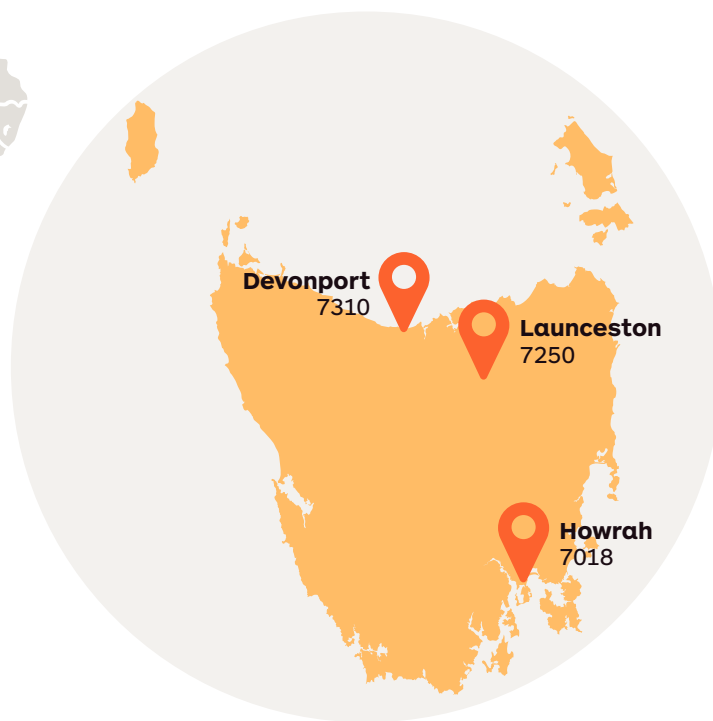
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## Media VIC/TAS

### 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.





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## Media VIC/TAS

### 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.

**Clyde North**  
VIC 3978

**3.5**



**Officer**  
VIC 3809

**2**



**Parkville**  
VIC 3052

**1.6**



**Doreen**  
VIC 3754

**1.2**



**Acton Park**  
TAS 7170

**0.7**



**Sandy Bay**  
TAS 7005

**0.7**



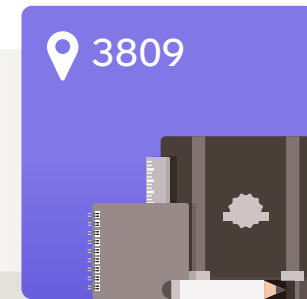
**Launceston**  
TAS 7250

**0.6**



**VIC**  
parcels per household

**TAS**  
parcels per household



### 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.



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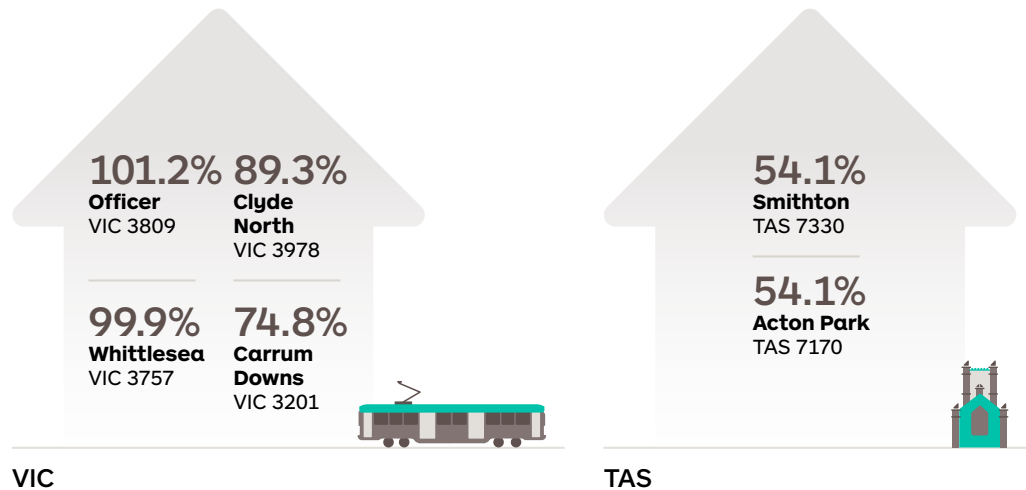
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## Media VIC/TAS

### Fastest-growing locations

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



### 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.



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# Media QLD

## Top 5 buying locations in QLD

Toowoomba ranks first in Australia for media purchases online.



Family households, Nerang 77.5%

National average 71.5%

### 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%).



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## Media QLD

### Top eCommerce buyers by household location

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

**Nathan**  
QLD 4111

**3.2**



**Noosaville**  
QLD 4566

**1.3**



**Loganholme**  
QLD 4129

**1.2**



**Tamborine mountain**  
QLD 4272

**1.1**



**Paddington**  
QLD 4064

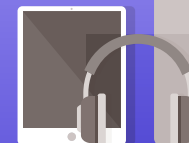
**1.1**



**QLD**  
parcels per household

Median age,  
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.



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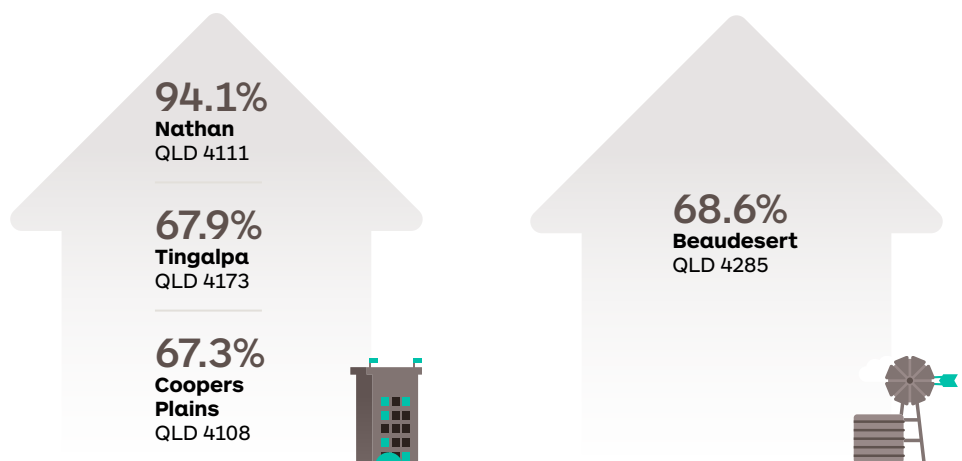
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## Media QLD

### Fastest-growing locations

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



Metro

Regional

#### 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.



## Future growth

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.



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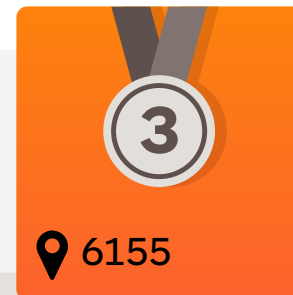
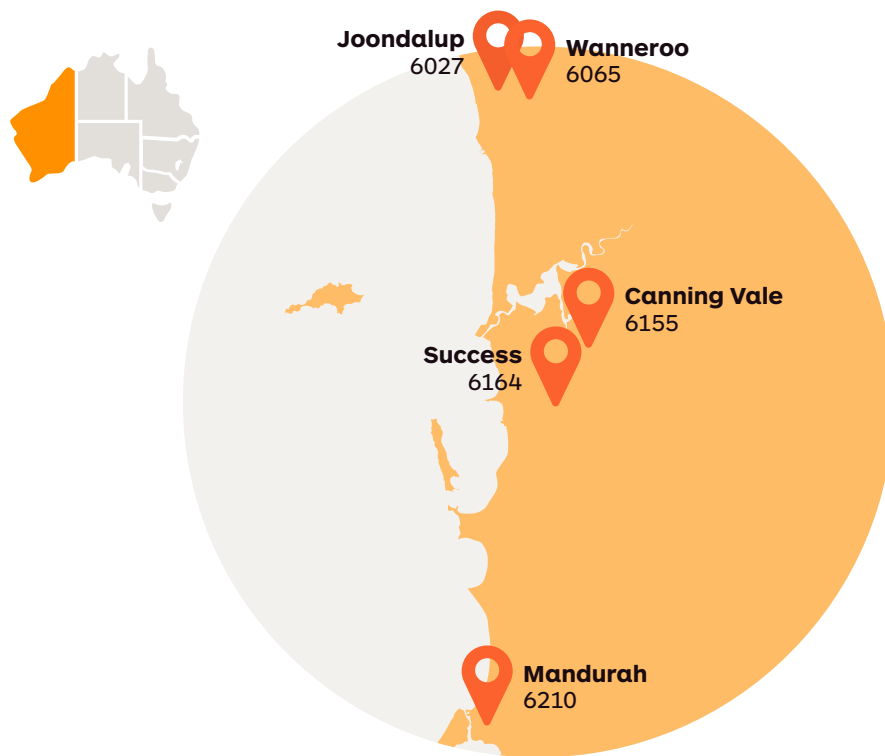
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## Media WA/SA/NT

### 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.



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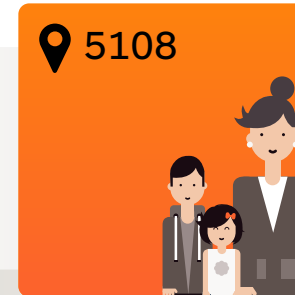
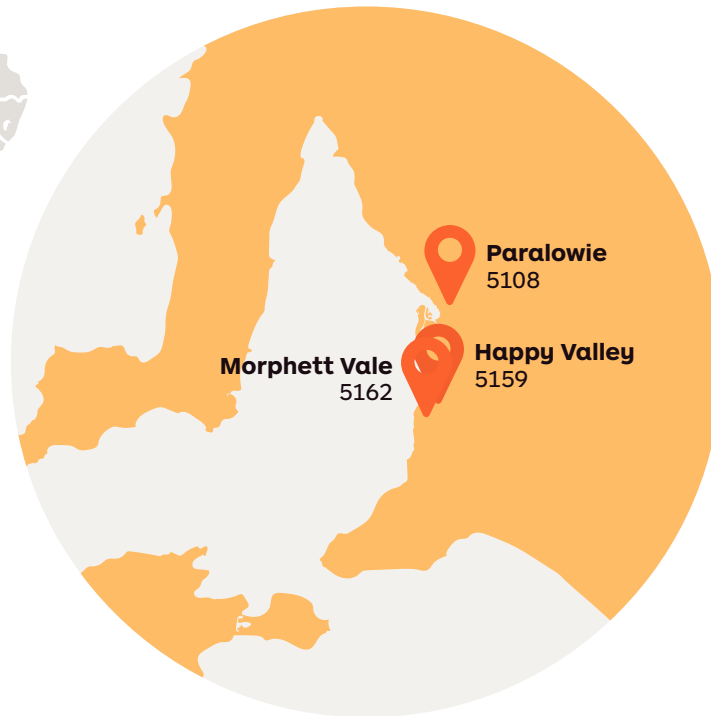
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## Media WA/SA/NT

### 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%.



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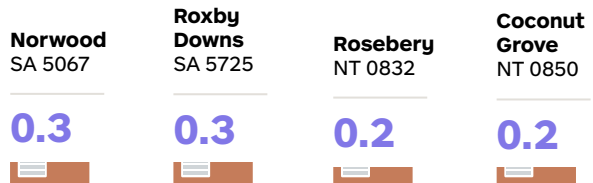
## Media WA/SA/NT

### Top eCommerce buyers by household location

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

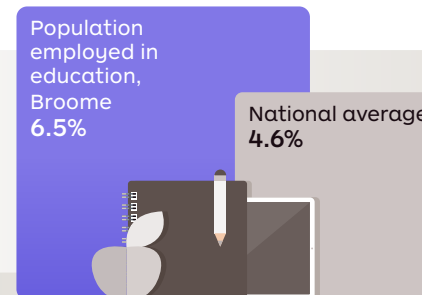


**WA**  
parcels per household



**SA**  
parcels per household

**NT**  
parcels per household



### Spotlight:

#### Broome

Broome – a tourist hotspot in northern WA – is a hotspot for media purchases as well. Households here received on 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.





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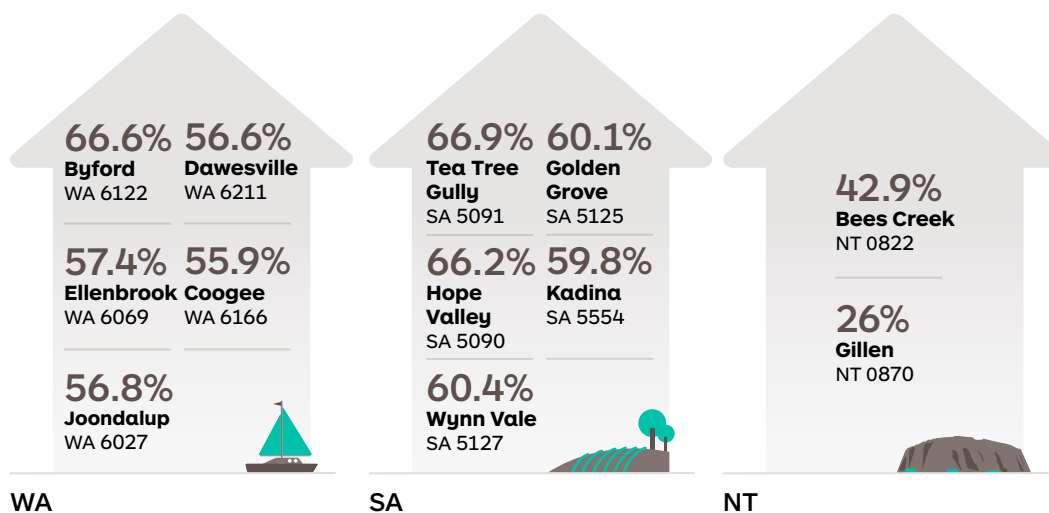
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## Media WA/SA/NT

### Fastest-growing locations

South Australia showed strong growth in media, with purchases up 39.3% year-on-year.



#### 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.



# Inside Australian Online Shopping

 Specialty Food & Liquor

Overview

NSW/ACT

VIC/TAS

QLD

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2016 eCommerce Industry Paper





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## 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.



### Top buying locations\*

Cairns QLD

Mandurah WA

Launceston TAS

\* top locations for online purchases

### Top buyers by household\*

Onslow WA

Currie TAS

Port Hedland WA

\* top locations for online purchases (parcels) per household

### Top growth locations\*

Cornubia QLD

Highfields QLD

West Hoxton NSW

\* top locations by year-on-year growth in online purchases

### Future growth\*

Emerald QLD

Ulladulla NSW

Yarrowonga VIC

\* our predictions for future growth



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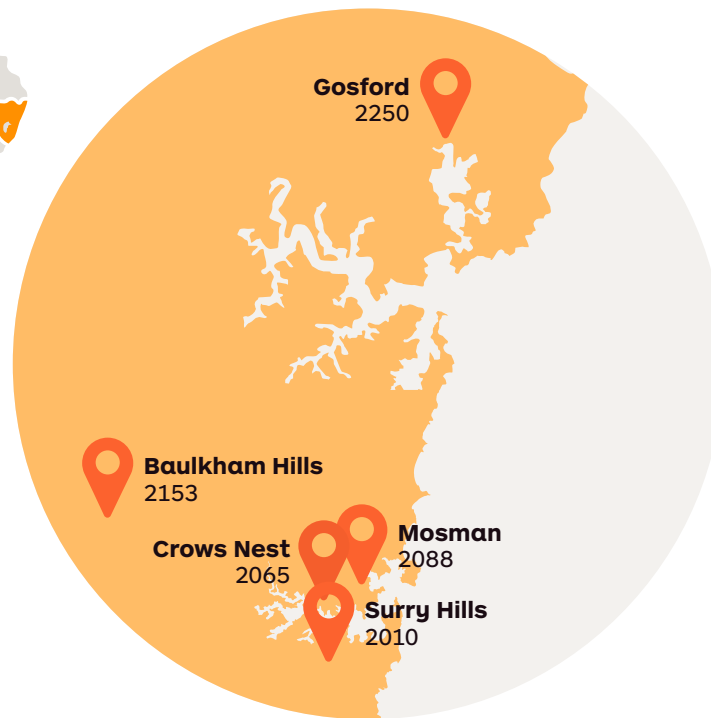
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## Specialty Food & Liquor NSW/ACT

### Top 5 buying locations in NSW

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



Household median weekly income, Mosman  
**\$2,463**

National median  
**\$1,234**



### Spotlight:

#### Mosman

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.



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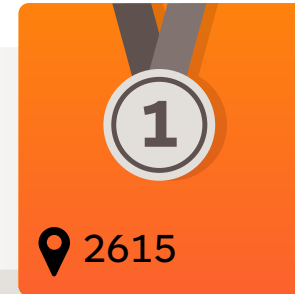
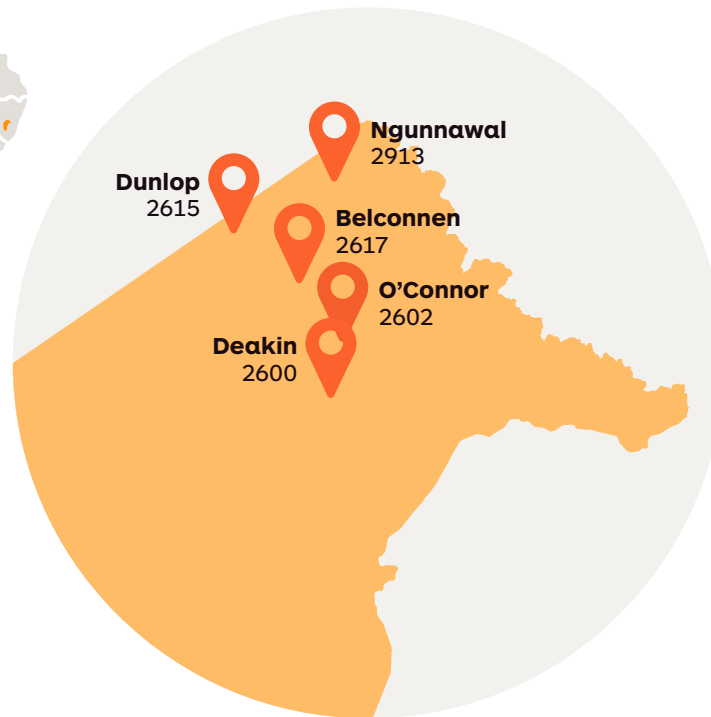
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## Specialty Food & Liquor NSW/ACT

### Top 5 buying locations in ACT

Dunlop ranks first in the ACT for buying specialty food and liquor online.



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.



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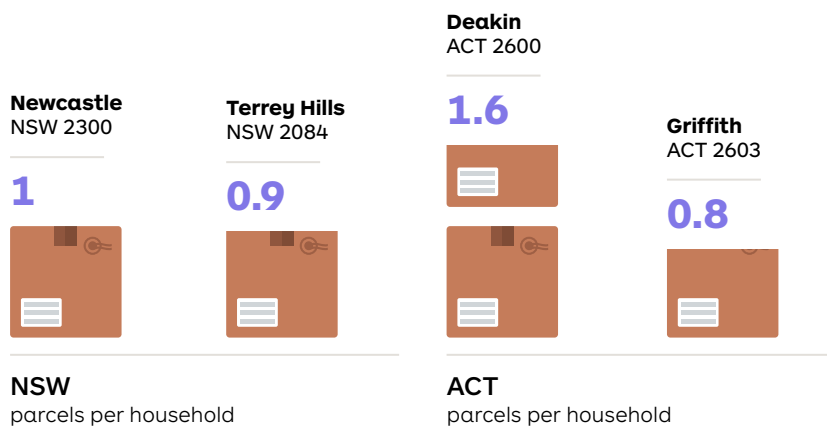
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## Specialty Food & Liquor NSW/ACT

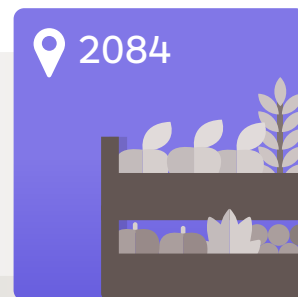
### Top eCommerce buyers by household location

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



NSW parcels per household

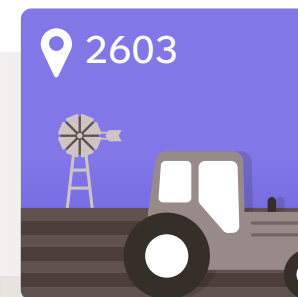
ACT parcels per household



#### 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.



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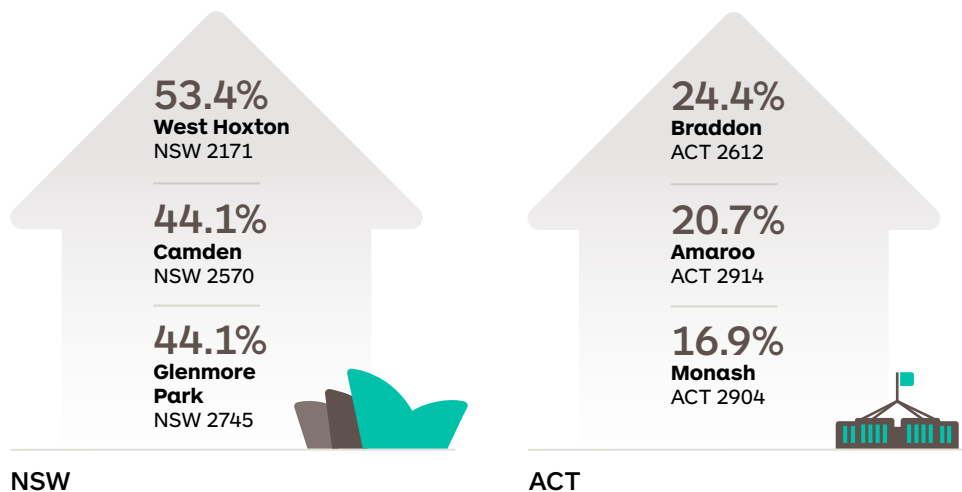
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## Specialty Food & Liquor NSW/ACT

### Fastest-growing locations

New South Wales was the second-best performing state for specialty food and liquor, with purchases up 17.5% year-on-year.



### 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.



## 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.



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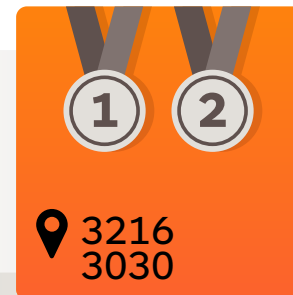
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## Specialty Food & Liquor VIC/TAS

### 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.





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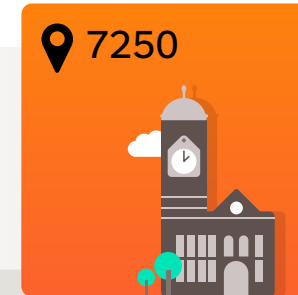
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## Specialty Food & Liquor VIC/TAS

### 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.



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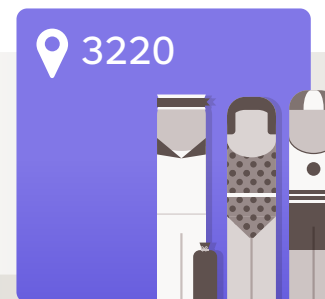
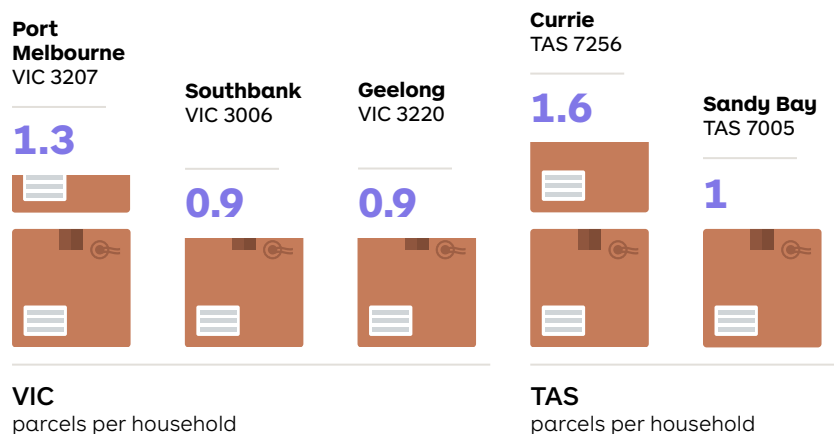
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## Specialty Food & Liquor VIC/TAS

### 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.



### 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.



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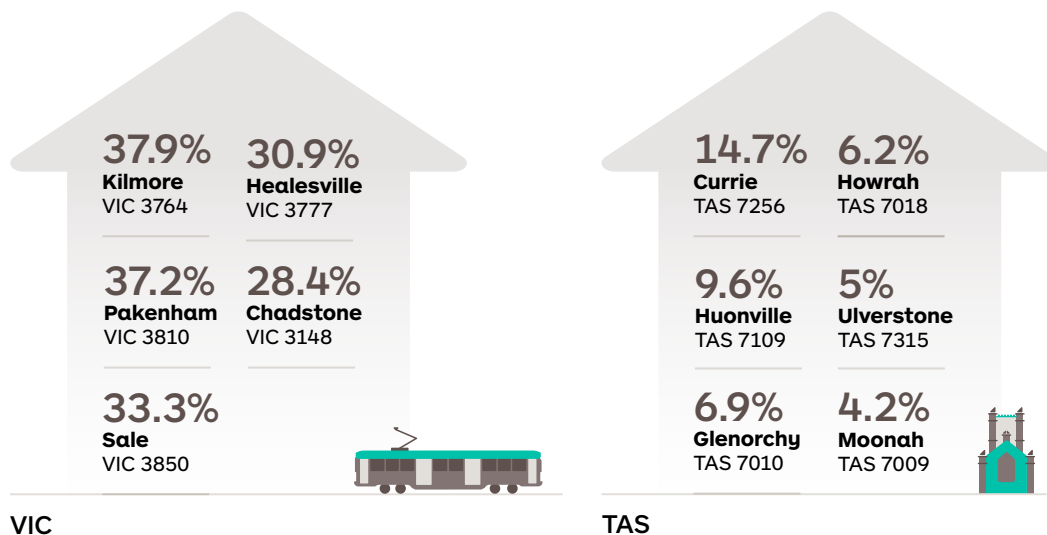
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## Specialty Food & Liquor VIC/TAS

### Fastest-growing locations

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



#### 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.



## Future growth

Yarrowonga, 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.



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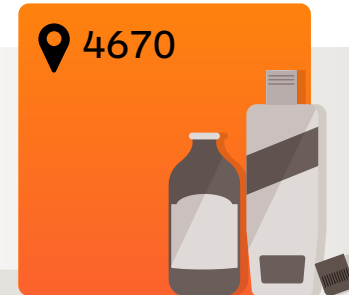
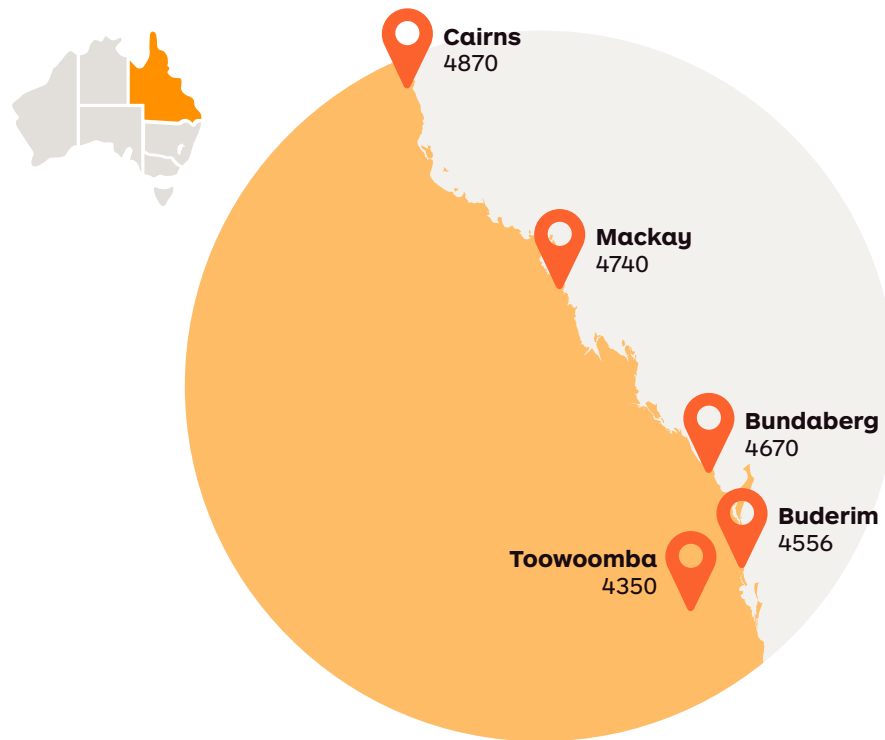
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## Specialty Food & Liquor QLD

### 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.



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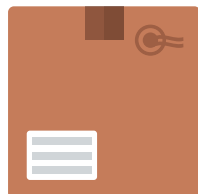
## Specialty Food & Liquor QLD

### 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.

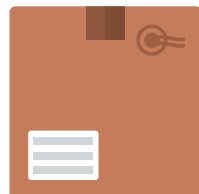
**Weipa**  
QLD 4874

1.4



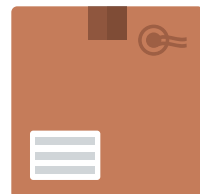
**Point Lookout**  
QLD 4183

1.3

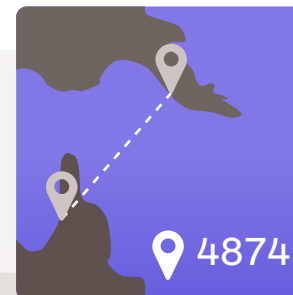


**Murarrie**  
QLD 4172

1.2



QLD  
parcels per household



### 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.



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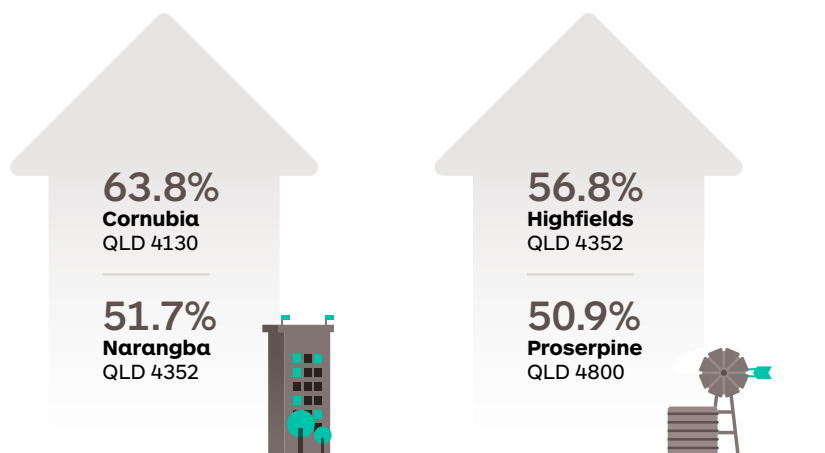
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## Specialty Food & Liquor QLD

### Fastest-growing locations

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



Metro

Regional

#### 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.



## 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.



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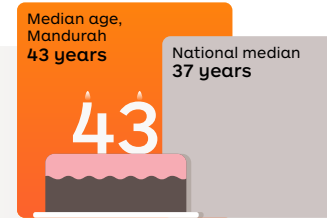
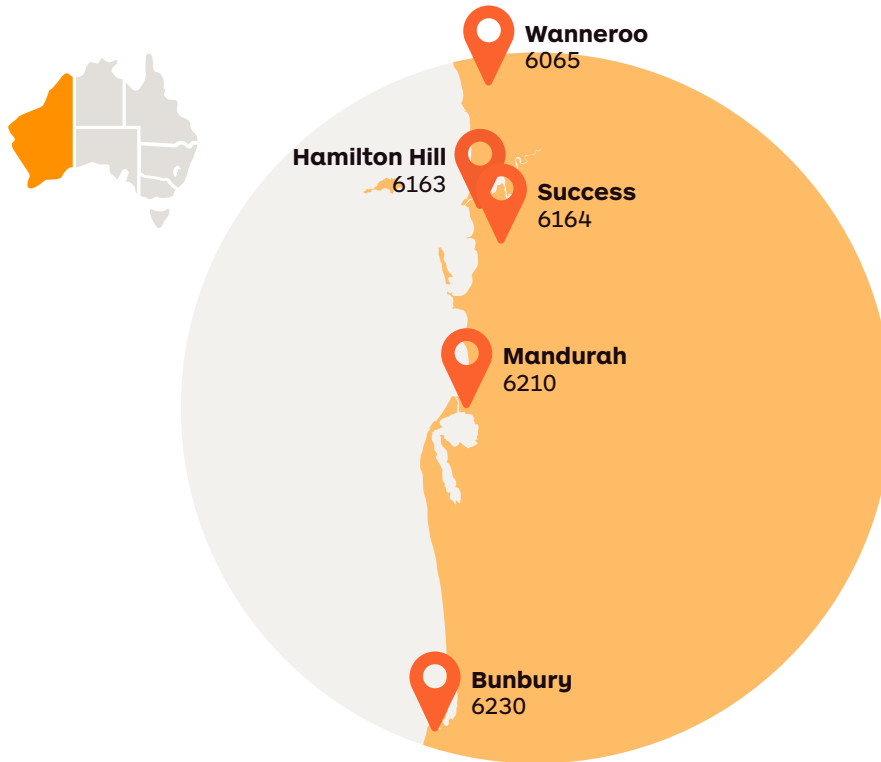
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## Specialty Food & Liquor WA/SA/NT

### 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.



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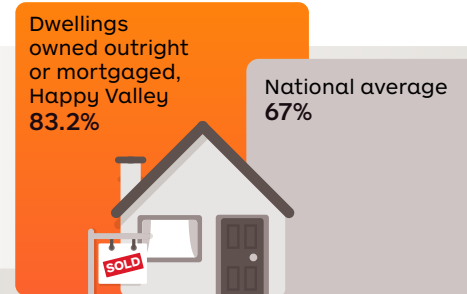
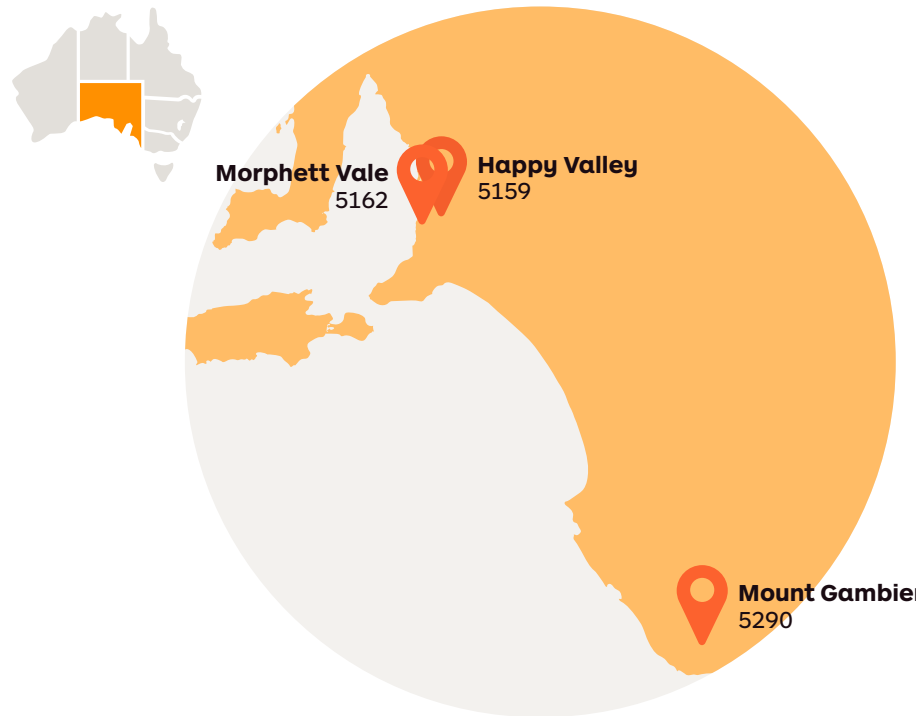
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## Specialty Food & Liquor WA/SA/NT

### 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%.





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## 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.

**Onslow**  
WA 6710

7.1



**West Perth**  
WA 6005

1.9



**Port Hedland**  
WA 6721

1.6



**Stirling**  
SA 5152

1.2



**Tanunda**  
SA 5352

1



**Unley**  
SA 5061

0.9



**Stuart Park**  
NT 0820

0.8



**Howard Springs**  
NT 0835

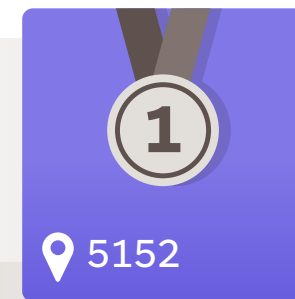
0.7



**WA**  
parcels per household

**SA**  
parcels per household

**NT**  
parcels per household



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.



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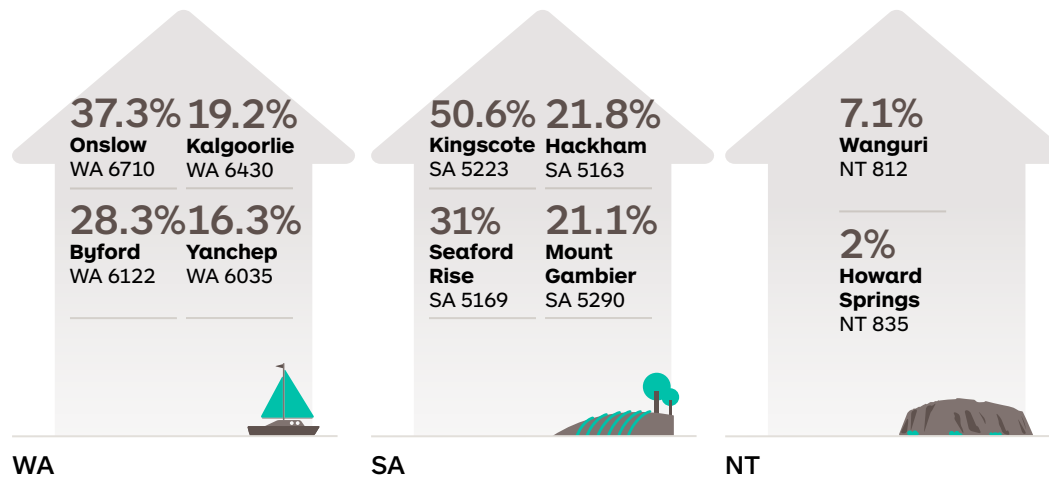
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## Specialty Food & Liquor WA/SA/NT

### 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.



### 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.



## 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.



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## Christmas overview

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.



**Media was the biggest growth area, up 31.7% year-on-year.**



**Recreational Goods up 20.5%**



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## Christmas Games & Toys

### Top 3 locations

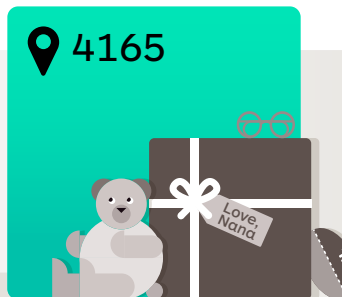


Games & Toys

Victoria Point QLD

Wyong NSW

Brassall QLD



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?



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## Christmas Recreational Goods

### Top 3 locations

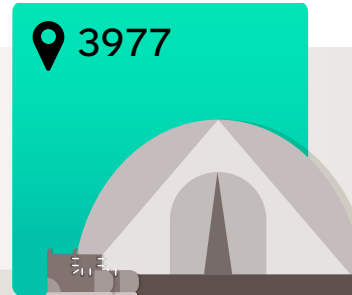


#### Recreational Goods

Cranbourne VIC

Point Cook VIC

Wagga Wagga NSW



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.



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## Christmas Fashion

### Top 3 locations



**Fashion**

Bateau Bay NSW

Cranbourne VIC

Sanctuary Point NSW



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.



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## Christmas Specialty Food & Liquor

### Top 3 locations

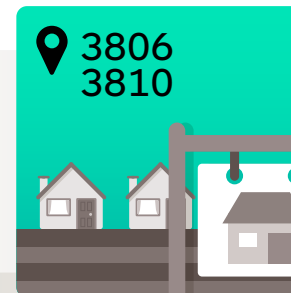


Specialty Food & Liquor

Berwick VIC

Pakenham VIC

Kalgoorlie WA



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.





## 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 Quantum.

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 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](http://auspost.com.au) and [startrack.com.au](http://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

Quantum is Australia's leading data analytics and marketing strategy firm. Quantum 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

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