



Inside Australian Online Shopping eCommerce update November 2022



November the biggest month in Australian online shopping history

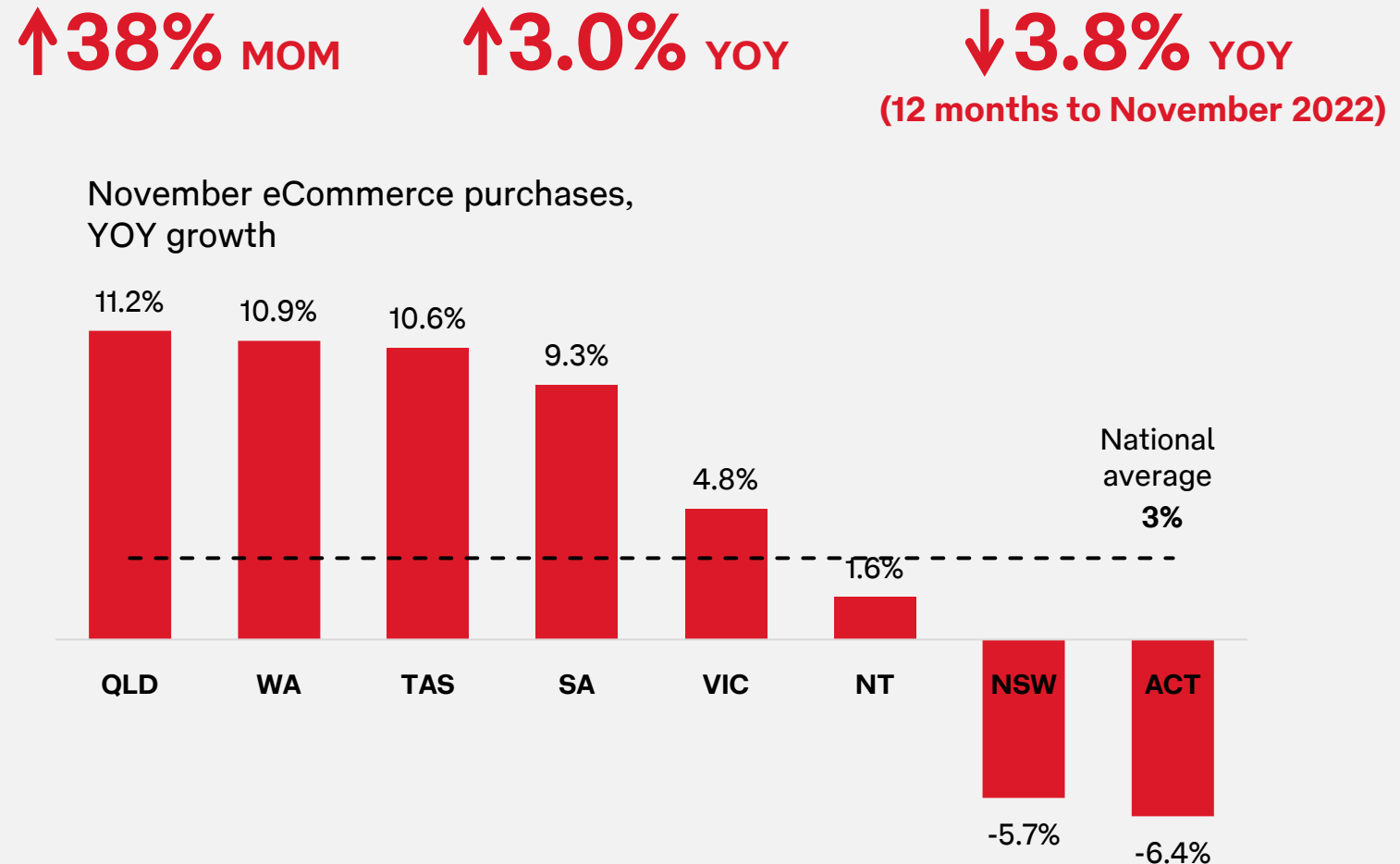
Driven by the popularity of Black Friday and Cyber sales, online purchases **topped last November's record by 3%**, making this the **biggest month in Australian online shopping history**.

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

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

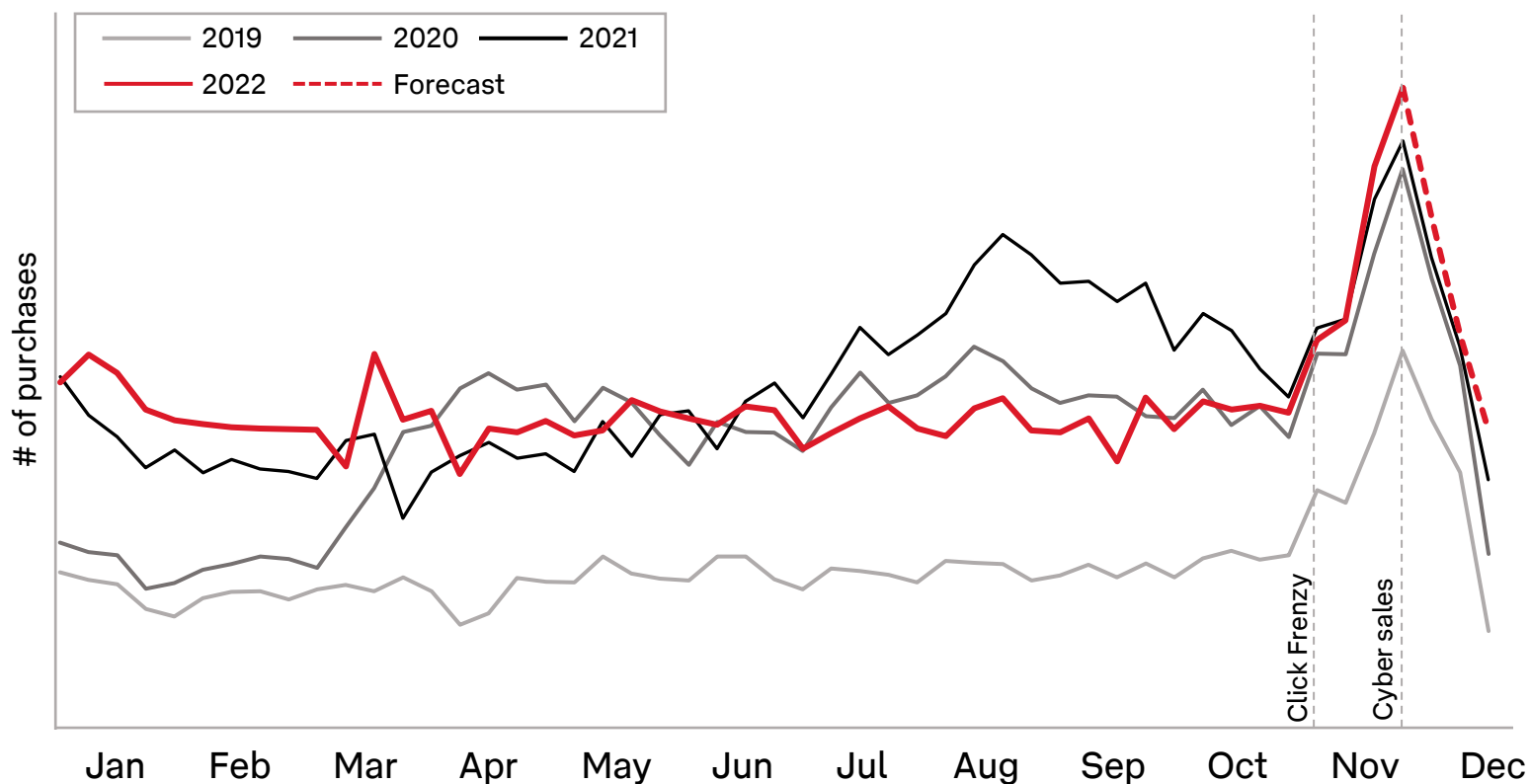
What's in this update?

This month we share insights about the popularity of Click Frenzy and the Cyber Weekend sales, including which categories were most popular for online shoppers.



Retailers getting a head start on the Black Friday sales

Online purchase volume by week



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

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

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

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

6+mil
households shopped online
this month

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

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

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

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

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

↑20%

compared to the two-week period before Click Frenzy

↓1.4% YOY

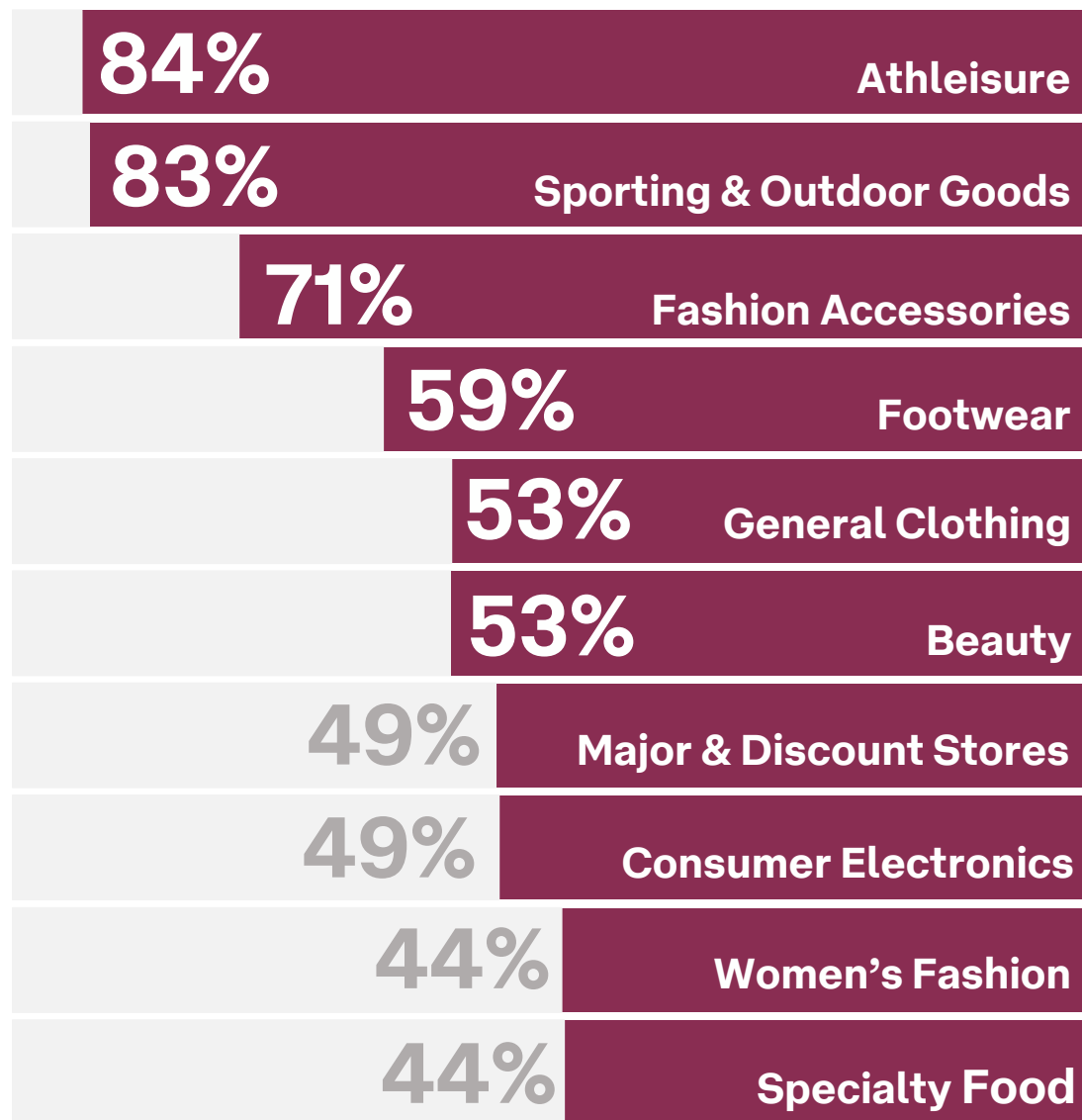
compared to same period (Click Frenzy) last year

What was most popular?¹



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

What was most popular?¹



Biggest Cyber Weekend sales on record

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

A record Black Friday and Cyber Monday event, with online purchases **surpassing last year's record Cyber Weekend by 6.6%**. Online purchases grew an additional 42% compared to the two weeks prior (the Click Frenzy period¹). Just over **1 in 3 purchases were from NSW**. Victoria and Queensland followed as the second and third biggest purchasers over the period.

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

↑ **42%**

compared to the two weeks prior (the Click Frenzy period)

↑ **6.6% YOY**

compared to the same period (Cyber sales) last year

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

Specialty retailer category insights



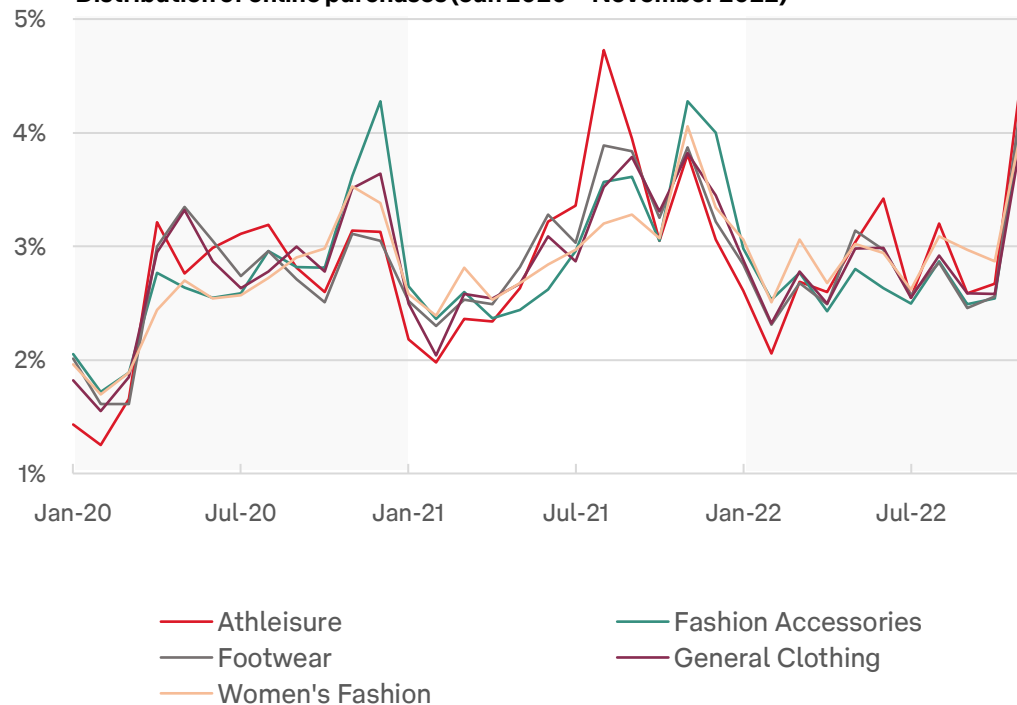
Specialty retailer category insights



Fashion & Apparel

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

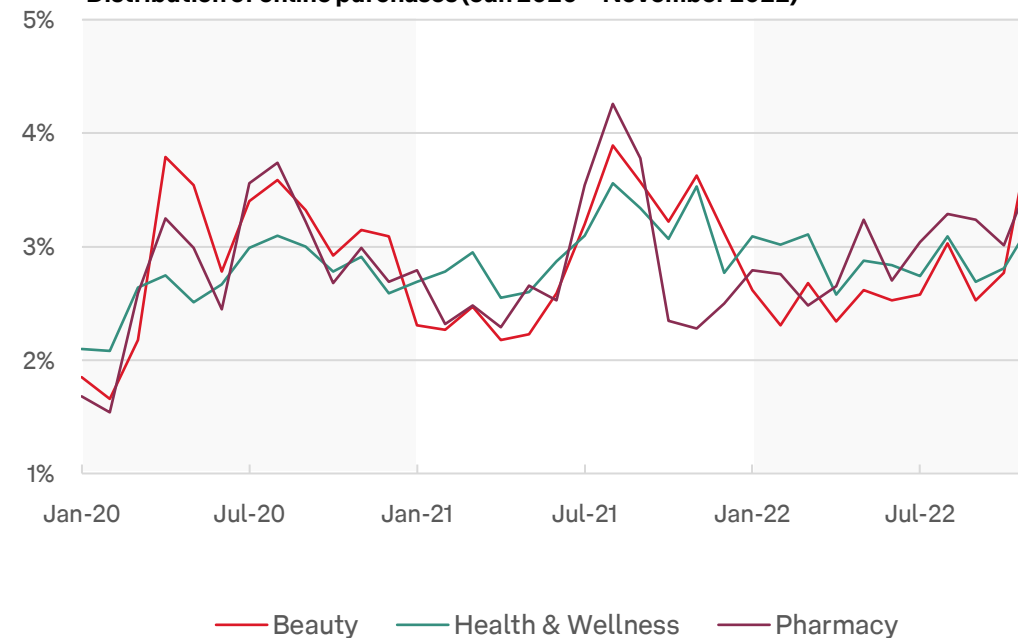
Distribution of online purchases (Jan 2020 – November 2022)¹



Health & Beauty

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

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



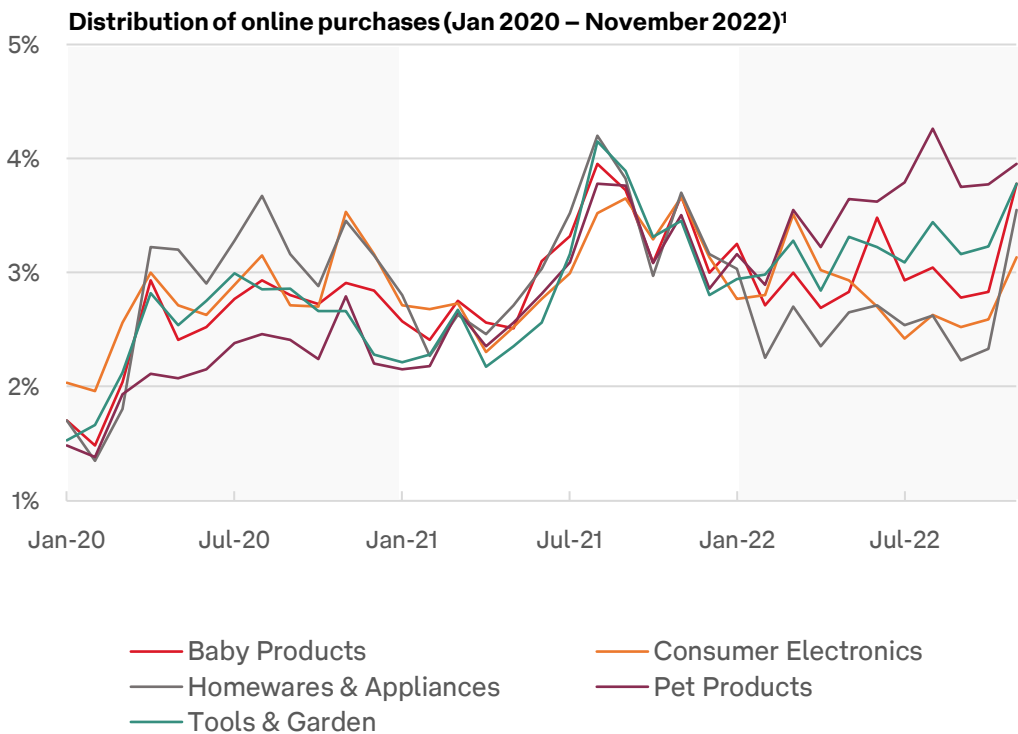
1. Represents the volume contribution (%) of each month over the total period Jan 2020 – Nov 2022

Specialty retailer category insights



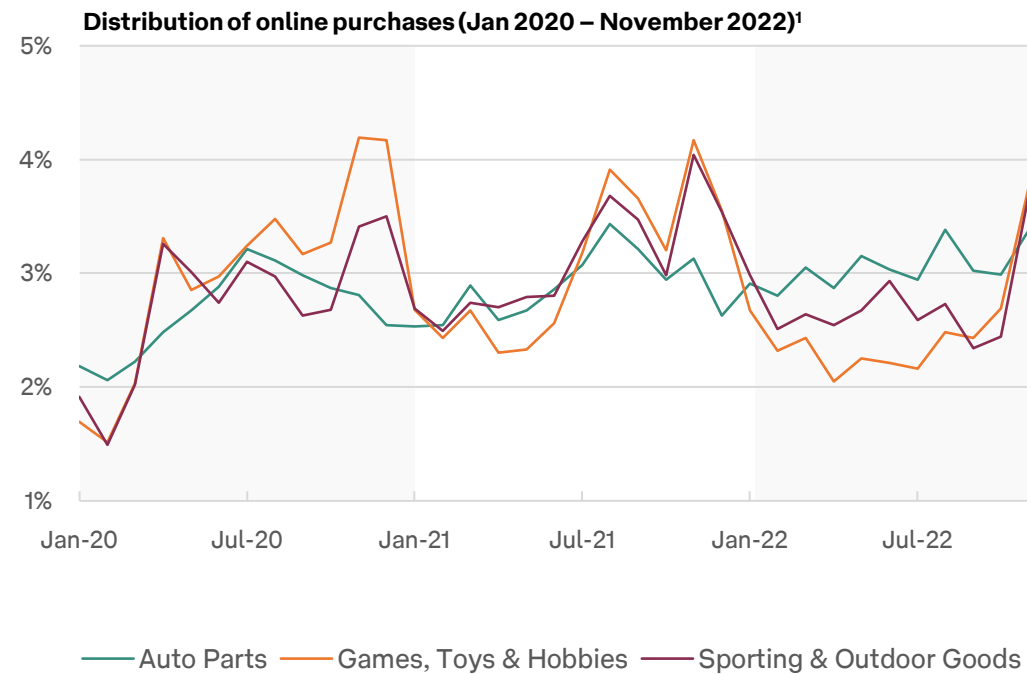
Home & Garden

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



Hobbies & Recreational Goods

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



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

Specialty retailer category insights



Specialty Food & Liquor

⬆️ **50% MOM** ⬇️ **2.4% YOY** ⬇️ **7.4% YOY**
12 months to November 2022

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



Variety Stores

⬆️ **35% MOM** ⬇️ **5.0% YOY** ⬇️ **10% YOY**
12 months to November 2022

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



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

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

This update has been prepared using 2019, 2020, 2021 and 2022 deliveries data recorded by the Australia Post Group, unless otherwise stated. Commentary in this update relating to online shopping is based on an extrapolation of this data. Year-on-year growth numbers are based on actual or extrapolated transaction volumes. Shoppers or households are measured as residential or mix use addresses that received an eCommerce parcel.

This information is provided for general information purposes only and is not intended to be specific advice for your business.

