australian ecommerce.

The changing shape of the local ecommerce and retail marketing landscape

Wave 2 | **August 2022**

Pureprofile | iab. australia

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introduction.

For more than 20 years, Pureprofile has been helping brands and businesses understand the power and necessity of research, especially when navigating turbulent times. We have seen enormous upheaval in the last few years throughout the globe and across all industries. With so many questions needing to be answered, we are both proud and privileged to be able to work with the IAB Australia for a second consecutive year on the Australian Ecommerce Report.

Last year we saw phenomenal ecommerce growth across all retail categories and consumer demographics. In the face of persistent lockdowns, retailers were forced to pivot to online and provide a smooth and convenient experience or face a certain demise.

Today, those businesses that flourished now find themselves at an interesting juncture; they need to maintain the growth they saw last year whilst also being very aware of the current economic environment and how that will continue to have an effect on consumer confidence. Consumers are highly conscious of their shopping behaviours and are driven by choice and convenience more than ever. Being able to demonstrate excellent value for money will be the determining factor for success.

Research has always formed a critical component of good business. In this period of intense and continuous change, it's important for retailers to keep close to their consumers and examine changing sentiment swiftly in order to send the right message, with the right products at the right time.

Martin Filz
CEO
Pureprofile

The IAB Australia brings together over 150 members to help build sustainable and diverse investment in digital advertising. Our role includes understanding the digital landscape and highlighting its opportunities to the broader market.

The IAB are proud to partner with Pureprofile to release the second wave of the Australian Ecommerce Report based on research examining consumer attitudes, behaviours and influences driving ecommerce in Australia.

Since the onset of the COVID pandemic in early 2020, consumer online shopping habits have changed from necessity and retailers have made investments in digital transformation resulting in huge growth in ecommerce expenditure. While Australians have been less restricted and able to return to physical stores this year, online retail expenditure has still continued to grow.

With the expectation of future economic downturn, retailers will face a new set of challenges. This report also provides an understanding of consumers who are cautious spenders due to the potential for further interest rate rises. Retailers will need to service customers who have embraced the convenience of home delivery as well as click-and-collect but are increasingly price sensitive and seeking value for money in their brand choices.

There are a range of digital channels consumers are using to discover brands. Continuing investment in advertising, particularly brand building, throughout economic uncertainty is the proven key to long term business success and coming out of a downturn strongly.

Gai Le Roy
CEO
IAB Australia

executive summary.

There has been extraordinary growth in ecommerce expenditure since the onset of the pandemic, particularly during lockdown periods. While this year shoppers have been able to get back into physical stores, regular online purchasing has still increased. Online shopping for both groceries and retail products has increased since last year.

It is expected we are heading into uncertain economic times, where retailers will potentially face a new set of challenges, with consumers hesitant to spend due to impending interest rate rises and cost of living pressures. Retailers understanding of online shoppers and how their brands can deliver convenience and value for money is going to be important to overcome spending hesitancy. Those currently experiencing cost of living pressures are more attracted to online shopping for price comparisons and for finding specific products. They are more likely to be looking for value in programs such as store loyalty cards.

Fashion is the most popular online purchase. Getting out and about has driven a small increase in shopping for new outfits. The largest growth since last year is in the purchase of groceries online. eBay and Amazon are the most popular online retailers and online shoppers have increased their purchasing at Amazon, Woolworths, BigW and Kmart.

Brand proof points such as innovation, personalisation, socially responsible, environmentally friendly and Australian owned have become compelling reasons for purchasing a brand and retailers should amplify communication of these brand proof points. Consumers who are particularly cautious about spending still agree these things are important. We would need to assess how this carries through to behaviour particularly in tighter economic conditions, but this presents an opportunity for all brands to authentically showcase their values and ethical credentials.

Direct-to consumer brand shopping has also been maintained this year. These brands sell goods entirely or primarily through their owned-and-operated digital channels. Awareness has grown for brands like Canva, Koala and Marley Spoon, who are contributing to a resilient direct brand landscape. We are also seeing that community connections built during covid are maintained this year with shoppers saying they are buying more things online from local retailers now.

Online search is the most popular source for inspiration and discovering brands when buying something online. Social media plays a significant role for millennial shoppers. Word of mouth has strengthened for discovering products with friends and family increasing as a source of discovery and product reviews a strong driver of brand choice.

Retailers themselves are a popular source of product inspiration with retailer marketing channels such as websites, emails, catalogues etc playing an important role in communicating to online shoppers. There is a dominance of digital touchpoints which also provide rich behavioural data for retail marketers.

In collecting personal data from shoppers, trust and transparency and clear communication of the data value exchange are key as online shoppers have at least some concerns regarding how retailers use their data. Most online shoppers do understand that their data is used for targeting advertising and marketing but there is a level of uncertainty on whether retailers share their data with other companies.

Positive buying experiences continue to reinforce online shopping behaviors with increased consumer confidence buying online. For retailers the report demonstrates the importance of omnichannel shopping experiences, delivering convenience, value for money, using a range of channels for brand discovery and building loyalty and trust with shoppers.

methodology.

Survey in field:

Wave 1 - June 2021
Wave 2 - June 2022

1,000

survey respondents each wave

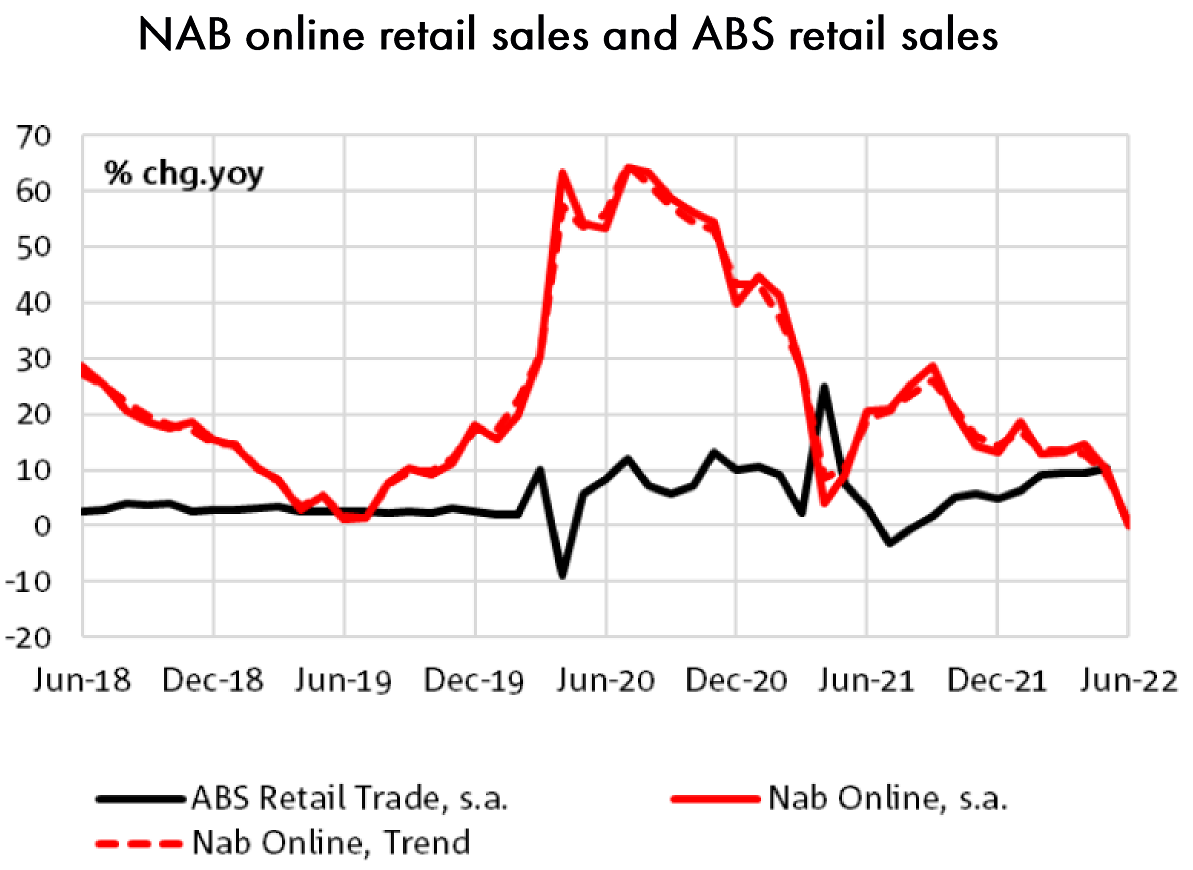
Respondents:

Nationally representative sample of Australians aged 18 to 70 who have shopped online at least once in the last 12 months

the size of the prize.

australian consumer online retail spend is now growing at 14.5% year on year.

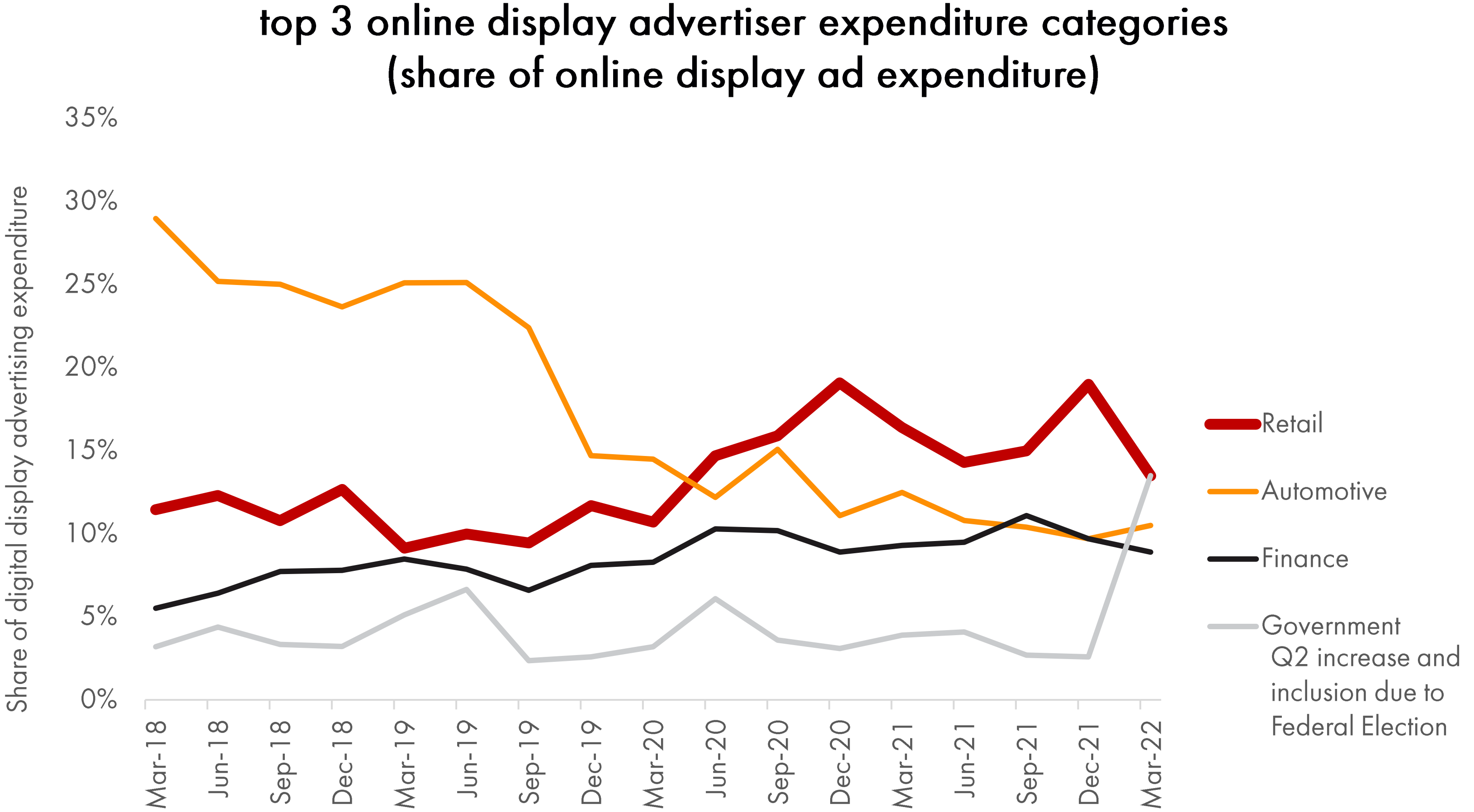
Australians spent $55.72 billion on online retail in the last year, around 14.5% of the total retail trade estimate.



Source; NAB Online Retail Sales Index June 2022

retail now the #1 digital ad spend category.

16%
retail category share of online display ad expenditure in CY21.



Source: IAB Australia Online Advertising Expenditure Report quarter ending March 2022, prepared by PWC

the shape of shopping.

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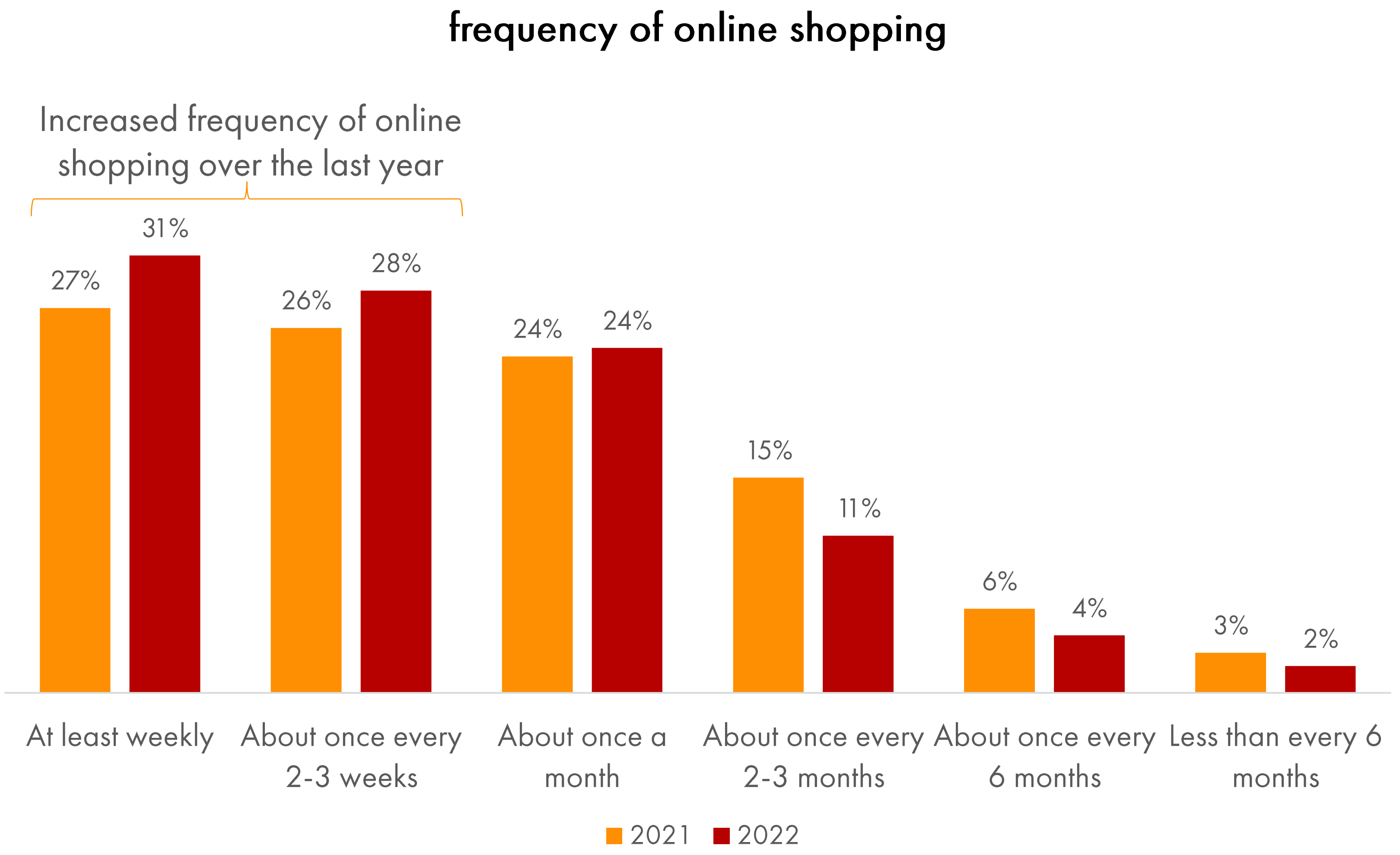
buying frequency for online shoppers.

83% of online shoppers are shopping every month, up from 76% last year.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - How often do you shop online?

increased online shopping for groceries and retail.

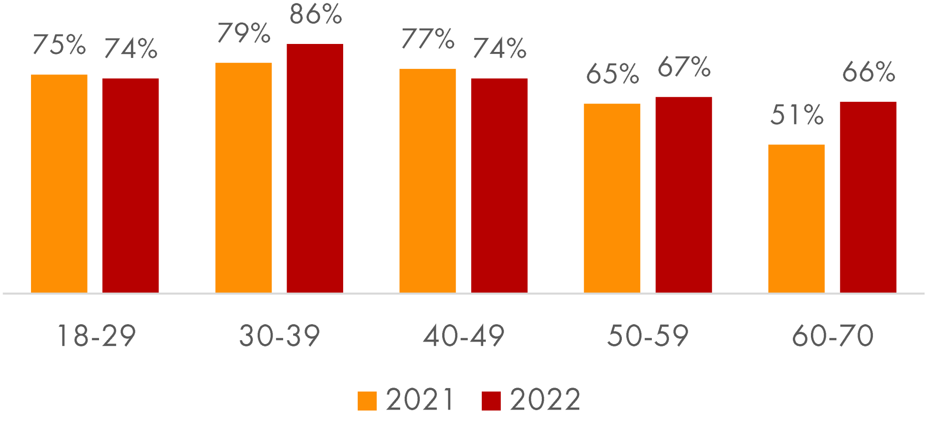
74% buy retail online every month

up from 70% last year

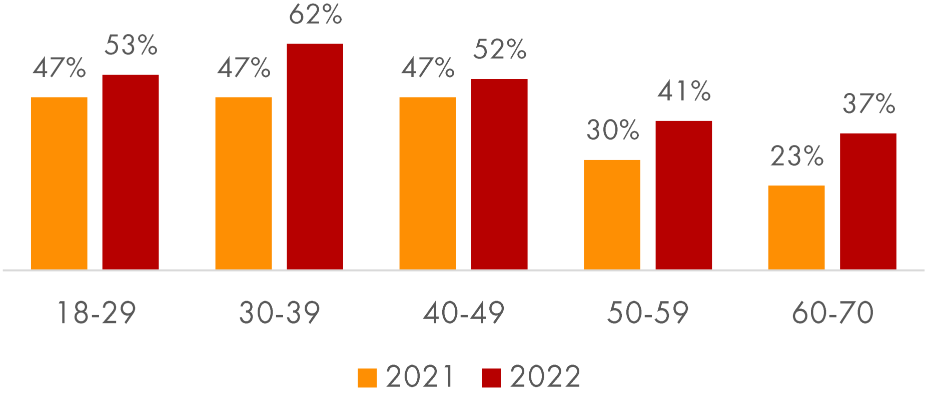
50% buy groceries online every month

up from 40% last year

online retail (non-grocery) shopping

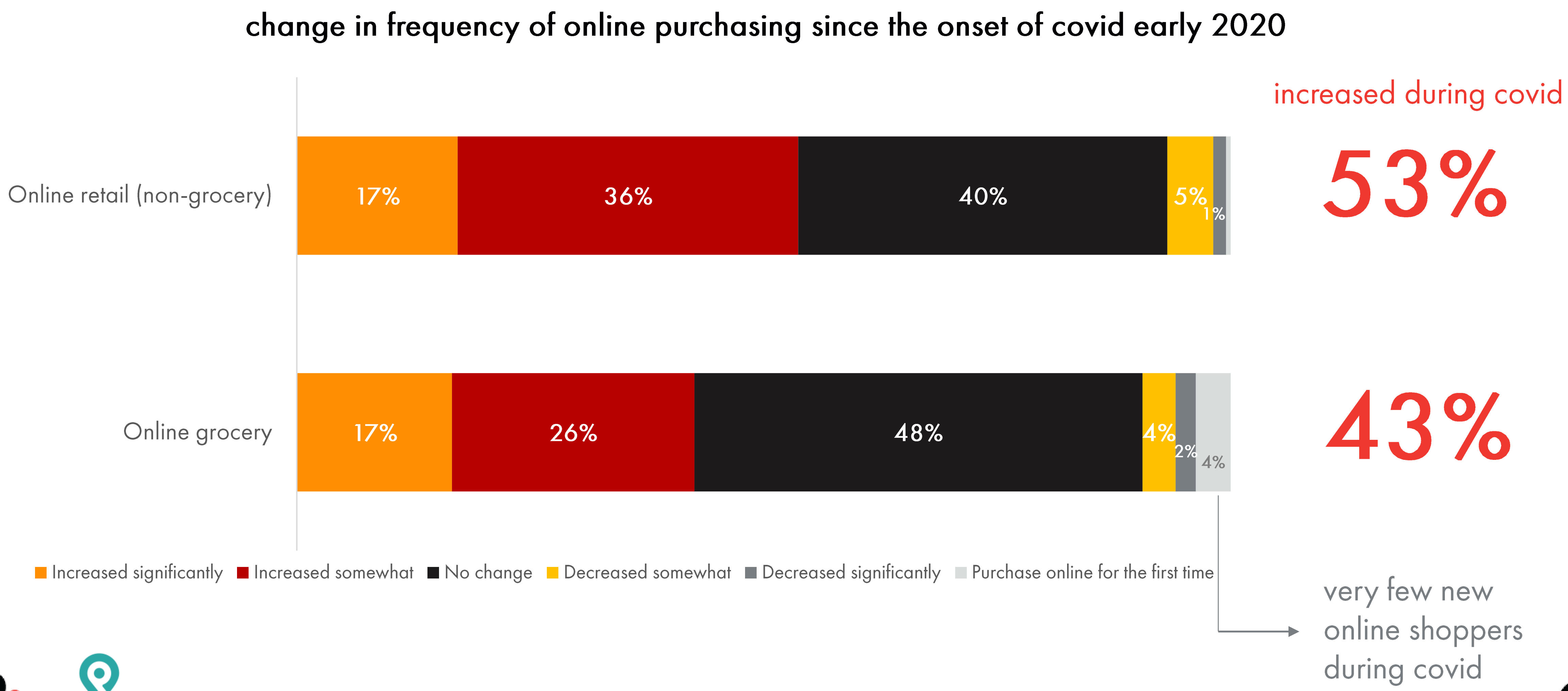


online grocery shopping



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - How often do you shop online for the following products? - Buy groceries online, Buy online retail (non- grocery)

increase in online shopping since onset of covid.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - In simple terms, how would you say your frequency of purchasing online has changed since the onset of the COVID-19 Pandemic (since early 2020)?- Buy groceries online, Buy online retail (non- grocery)

covid-19 has influenced shopping behavior.

"as COVID-19 restrictions eased I have returned to shopping in-store more"

55%

"I am more likely to buy from companies that I feel behaved well during the pandemic crisis"

47%

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Net agree)

buying behaviour.

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what is being purchased?

Clothing, shoes and fashion are the most popular online purchase

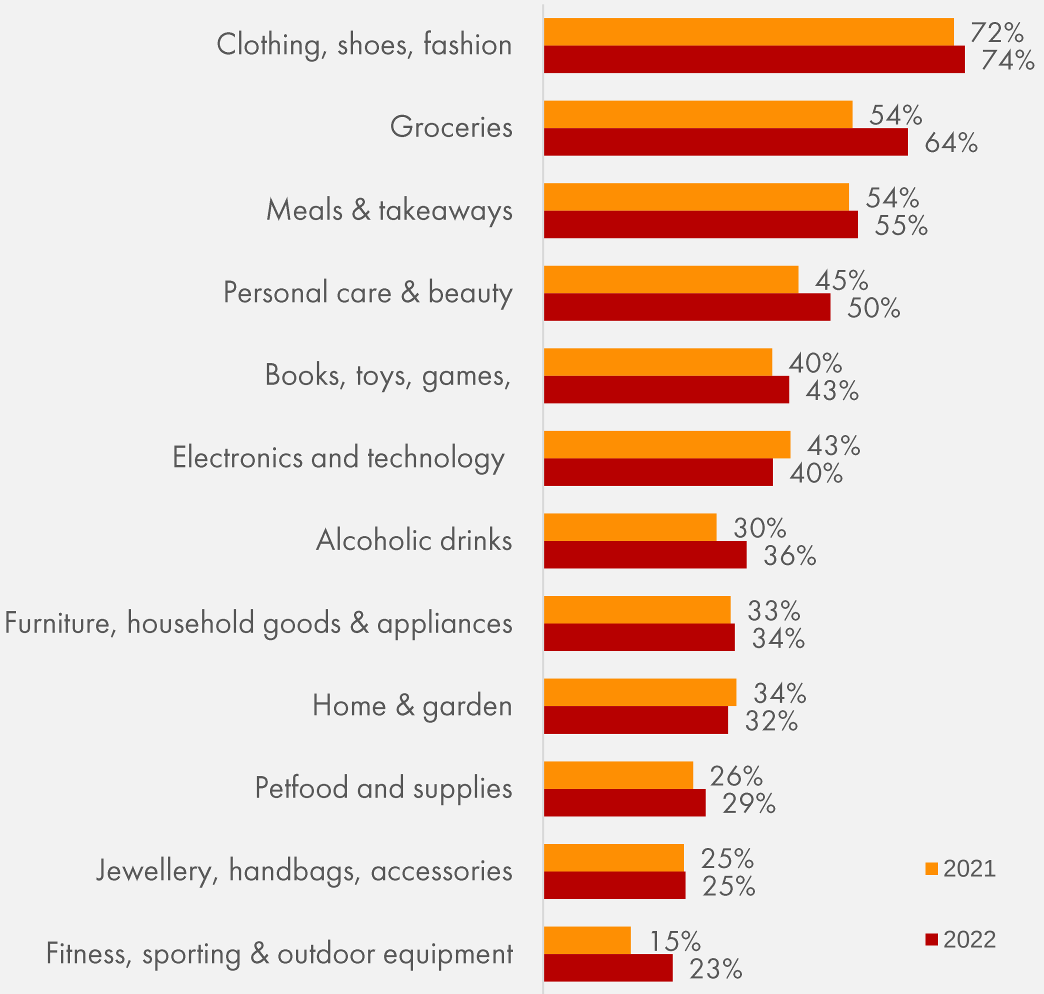
Largest growth is in the purchase of groceries online

- The purchase of groceries online in the last 12 months increased (+10) from 54% in 2021 to 64% in 2022
- Since last year there have also been increases in the online purchase of fitness, sporting & outdoor equipment (+8), alcoholic drinks (+6) and personal care & beauty (+5)

Some age and gender differences in purchasing:

- Females are more likely to purchase clothing, fashion and shoes (81%), also personal care and beauty products (64%)
- Males are more likely to purchase electronics and technology (51%), alcoholic drinks (45%) and slightly more likely to purchase groceries (66%)
- 30-39 year olds are more likely than any other age group to purchase all products online except for jewellery, handbags, accessories (most likely age group 18-29, 33%) and electronics and technology, incl mobile phones (most likely age group 40-49's, 49%)

products bought online in the last 12 months



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Which products have you bought online in the past 12 months?

who are we purchasing from?

eBay and Amazon are the most popular online retailers

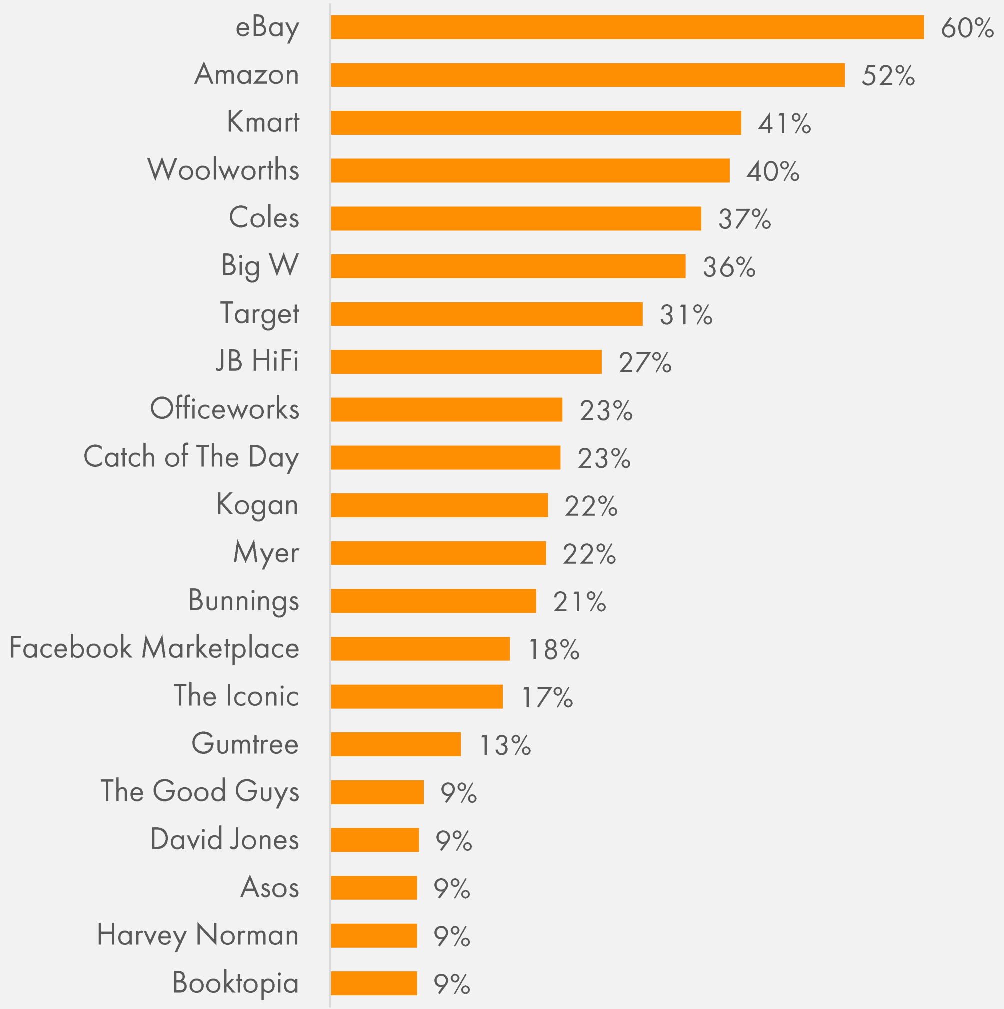
Year on year growth in purchasing from some online retailers:

- Amazon (+8), Woolworths (+8), BigW (+8), Kmart (+6)

Some age and gender differences in purchasing:

- Males are more likely to shop at Amazon, eBay, Kogan, JB HiFi
- Females are more likely to shop at Kmart, Target, Facebook Marketplace, BigW, Etsy, Adore Beauty
- 18-29's more likely than other age groups to shop at The Iconic, Asos, Adore Beauty
- 30-39's more likely than other age groups to shop at many retailers including Amazon, Kmart, BigW, Target, JB HiFi, Myer
- 40-49's more likely than other age groups to shop at Woolworths, Coles, Officeworks, Kogan, Catch, Bunnings
- 50-59's more likely than other age groups to shop at eBay and Booktopia

online retailers and marketplaces purchased from in the last 12 months



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Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - In the past 12 months, from which of the following retailers and marketplaces have you purchased online?

community connections built during covid are maintained this year.

34%

buying more things online from smaller businesses

2021 **34%**

48%

buying more things online from local retailers

2021 **46%**

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following? (Net agree)

positive online shopping experiences continue to reinforce behaviour.

66%

my online shopping experience has been is rewarding

2021 67%

69%

I look forward to online shopping again

2021 68%

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Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following? (Net agree)

drivers & influences.

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shoppers are cautious to spend due to current and potential future cost of living pressures.

66%

"cost of living pressures mean I don't have as much to spend on less essential retail shopping"

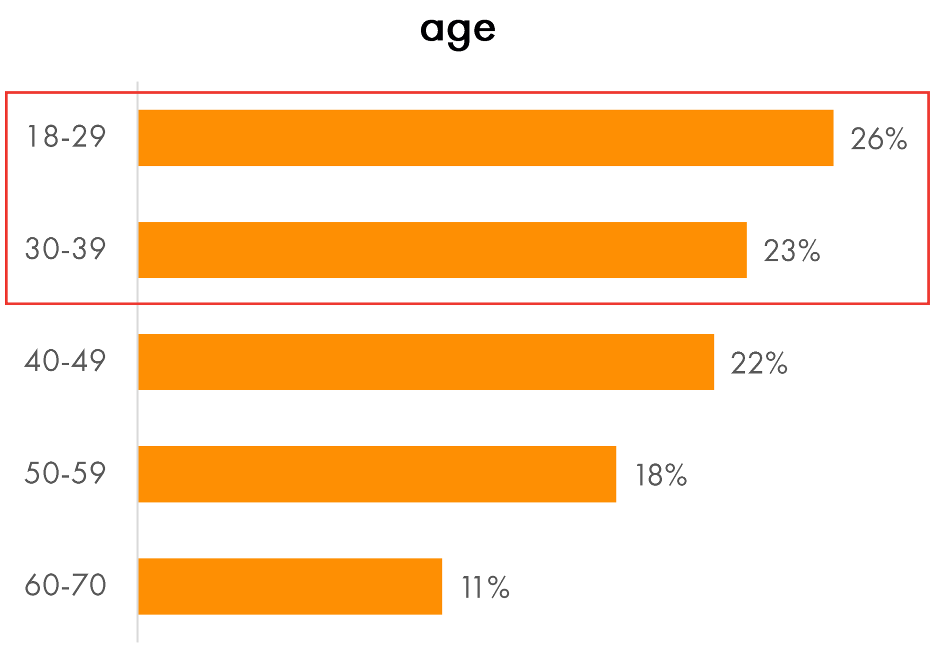
65%

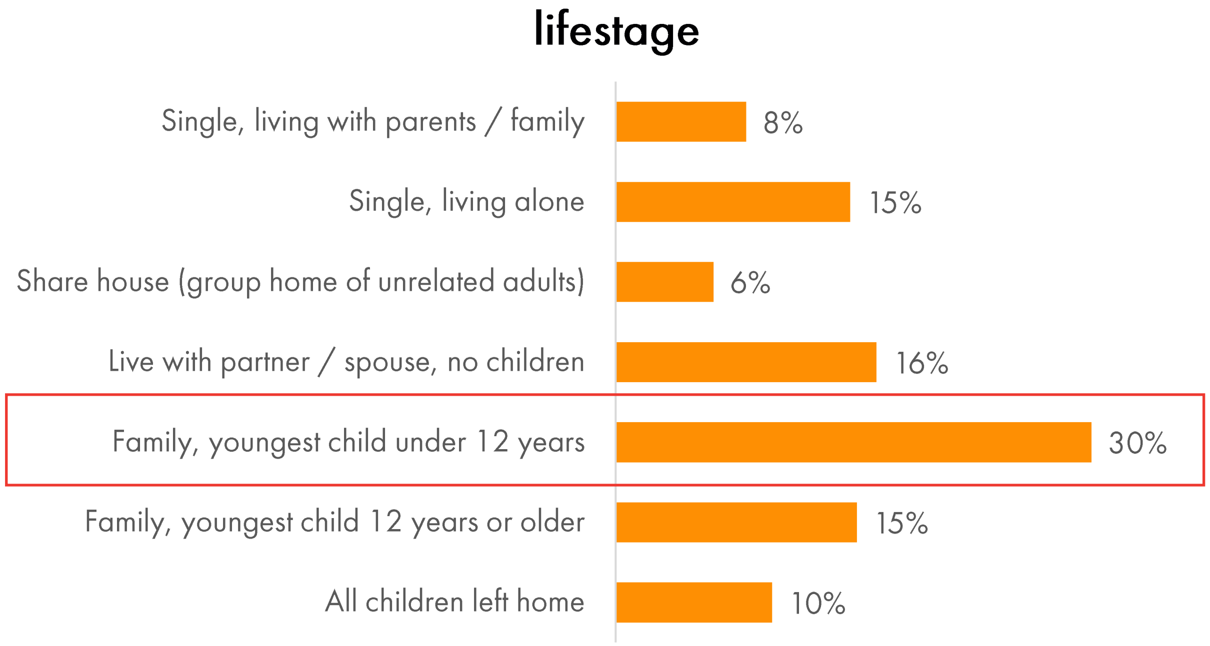
"potential for further interest rate rises means I'm more cautious about spending"

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Net agree)

a quarter of shoppers have less to spend.

24% strongly agree *"cost of living pressures mean I don't have as much to spend on less essential retail shopping"*
This sentiment is more prevalent amongst families with younger children.





Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Strongly agree)

convenience, research and trust can increase confidence.

50%

I am prepared to pay more for products that make my life easier

67%

If I'm buying a brand for the first time I always research it before making the purchase

29%

If I trust a brand I am happy to buy it without looking at the price

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following? (Net agree)

online purchasing drivers.

Convenience remains the #1 reason for purchasing online.

Fast shipping has declined as a driver

- With disruptions in delivery times experienced due to covid, fast shipping has declined year on year as a driver for online purchasing (-5)
- There have been slight declines in more product options (-4) and finding certain products and brands (-4) as drivers, which also could be the result of supply disruptions due to covid

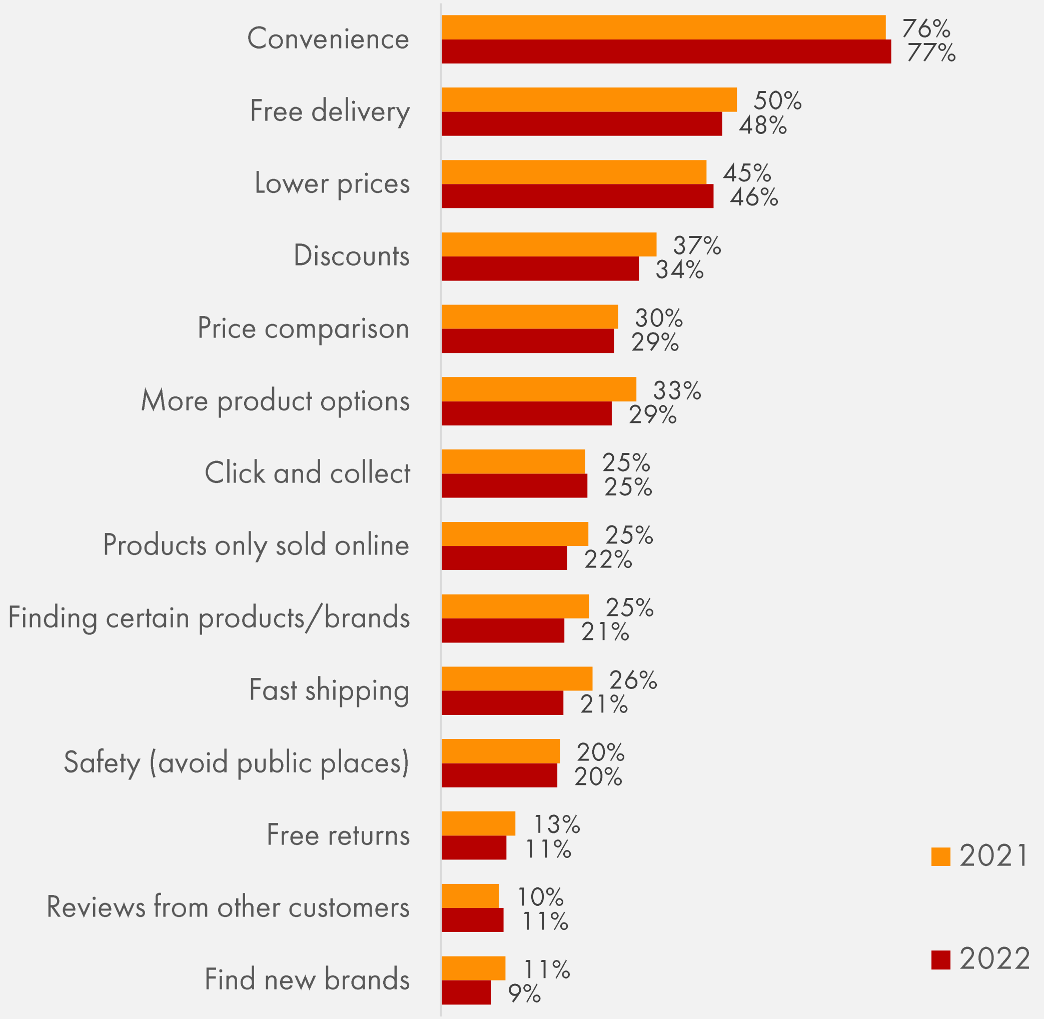
Convenience is universal but there are some age differences in other purchasing drivers:

- Lower prices (51%) and free delivery (55%) are greater drivers for 18-29's
- Fast shipping is a greater driver for 30-39's (28%)
- Click and collect is a greater driver for 40-49's (32%)
- Finding certain products/brands (26%) and products only sold online (26%) are greater drivers for 50-69's

Safety (avoiding public places) is more of a concern amongst weekly online grocer shoppers

- 32% of weekly online grocery shoppers are buying online to avoid the shops

reasons for buying online



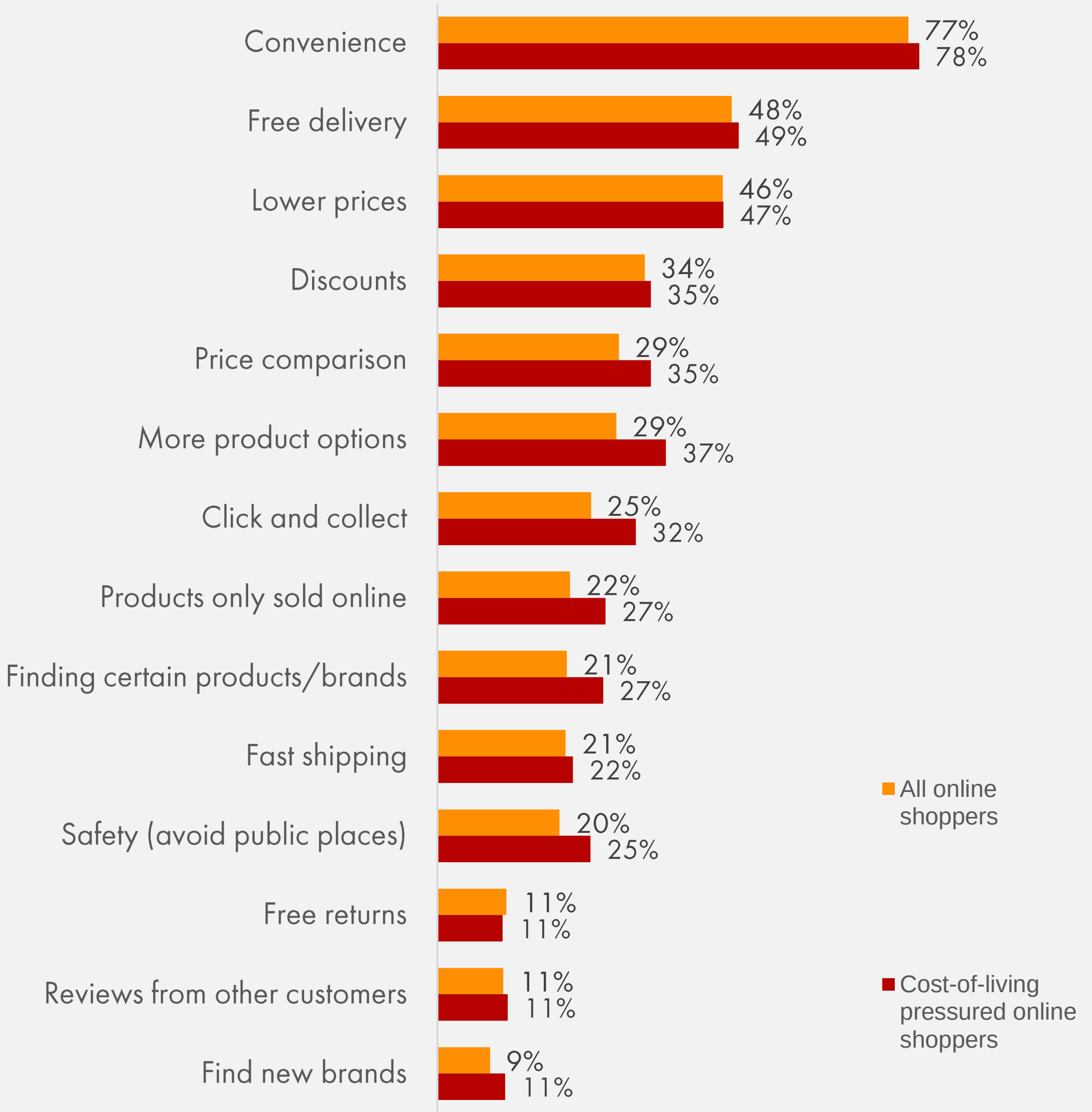
Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Why do you buy online?

online purchasing drivers for cost-of-living pressured.

For those who strongly agree *"cost of living pressures mean I don't have as much to spend on less essential retail shopping"* :

- Convenience is still the #1 reason for purchasing online, in fact they are more likely to seek convenience options such as click and collect
- They are more attracted to buy online by the opportunity to find more product options, certain products/brands and products only sold online
- They are more likely to have shopped at BigW, Kmart and Target
- They are also more likely to be heavy store loyalty program users
- Otherwise, these shoppers have very similar frequency and product purchasing behaviour as other online shoppers

reasons for buying online



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Why do you buy online? , Q - Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Strongly agree)

sources for inspiration and discovery.

Search remains key to discovering brands when shopping online.

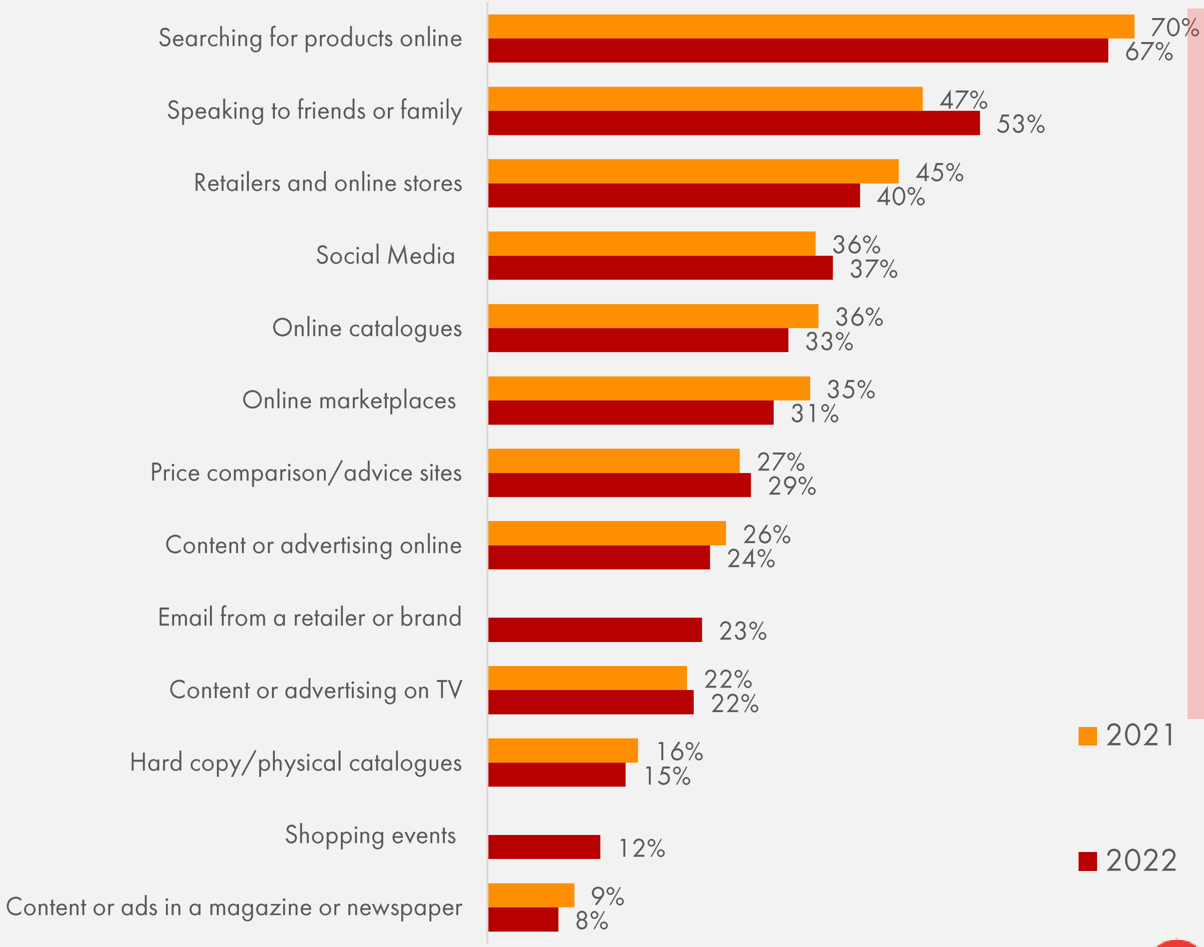
Word of mouth has strengthened.

- Speaking to friends and family has increased over the last year as a source of product inspiration (+6)

Some age differences in inspiration sources:

- Females are much more influenced by social media (44%) and speaking to family and friends (58%) than males
- Males are more influenced by price comparison and advice sites (32%)
- 59% of 18-29's use social media for product inspiration
- 30-39's rely more heavily on friends and family (62%) and shopping events such as Click Frenzy, Vogue online shopping night (19%)
- Over 50's more heavily influenced by searching for products online (77%) and emails from retailers (29%)

sources used for product inspiration and discovering brands when shopping online



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - When buying something online, what sources do you use for product inspiration and discovering brands?

social media & influencers.

39%

net agree
social media is now an important part of how I find products I go on to buy

50%
of millennials

28%

net agree
influencers on social media are a useful source to help me discover new products

37%
of millennials

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following? (Net agree) Amongst millennials aged 18-39.

online shoppable advertising.

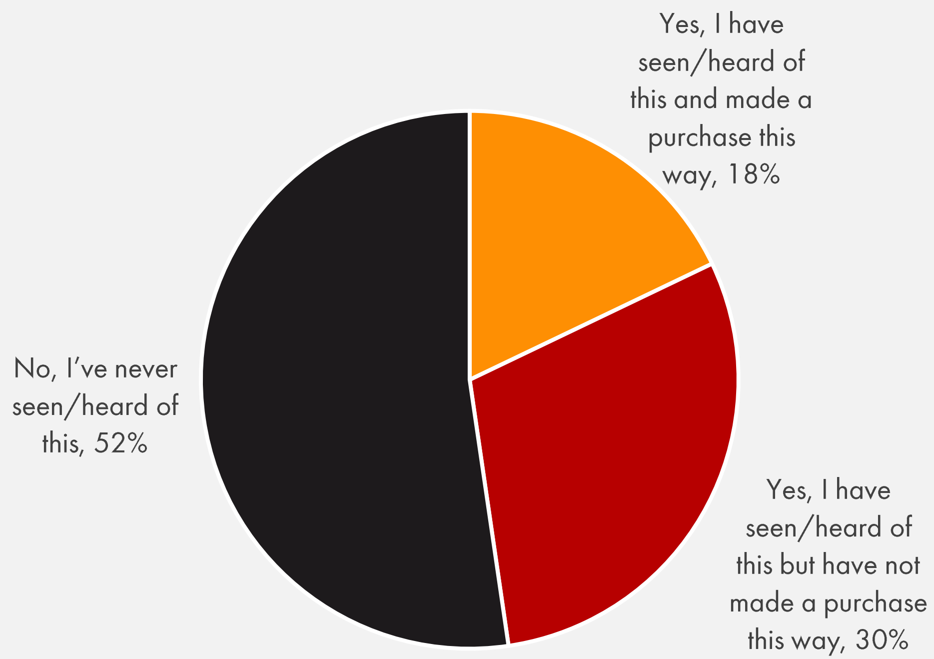
Nearly half (48%) of online shoppers are aware of shoppable advertising where you can make online retail purchases directly from the online advertisement you are viewing, often without leaving the website, app or platform you were browsing.

- 57% of 18-29's and 54% of 30-39's are aware of this type of advertising.

18% of online shoppers have made an online purchase this way.

- 21% of 18-29's and 25% of 30-39's have made an online purchase this way.

awareness of online shoppable advertising



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022. (n=1,000 per wave) Q - Before today were you aware of shoppable advertising where you can make online retail purchases directly from the online advertisement you are viewing, often without leaving the website, app or platform you were browsing?

brand choice drivers.

brand choice drivers.

Value for money stands out as the most compelling feature of brands purchased online.

- Value for money as a driver is highest amongst people aged 50-59 (88%) and those who are more frequent online shoppers (88% amongst those shopping online at least weekly)
- 87% of cost-of-living pressured online shoppers (those who strongly agree *"cost of living pressures mean I don't have as much to spend on less essential retail shopping"*) rated value for money as the key reason for brand choice

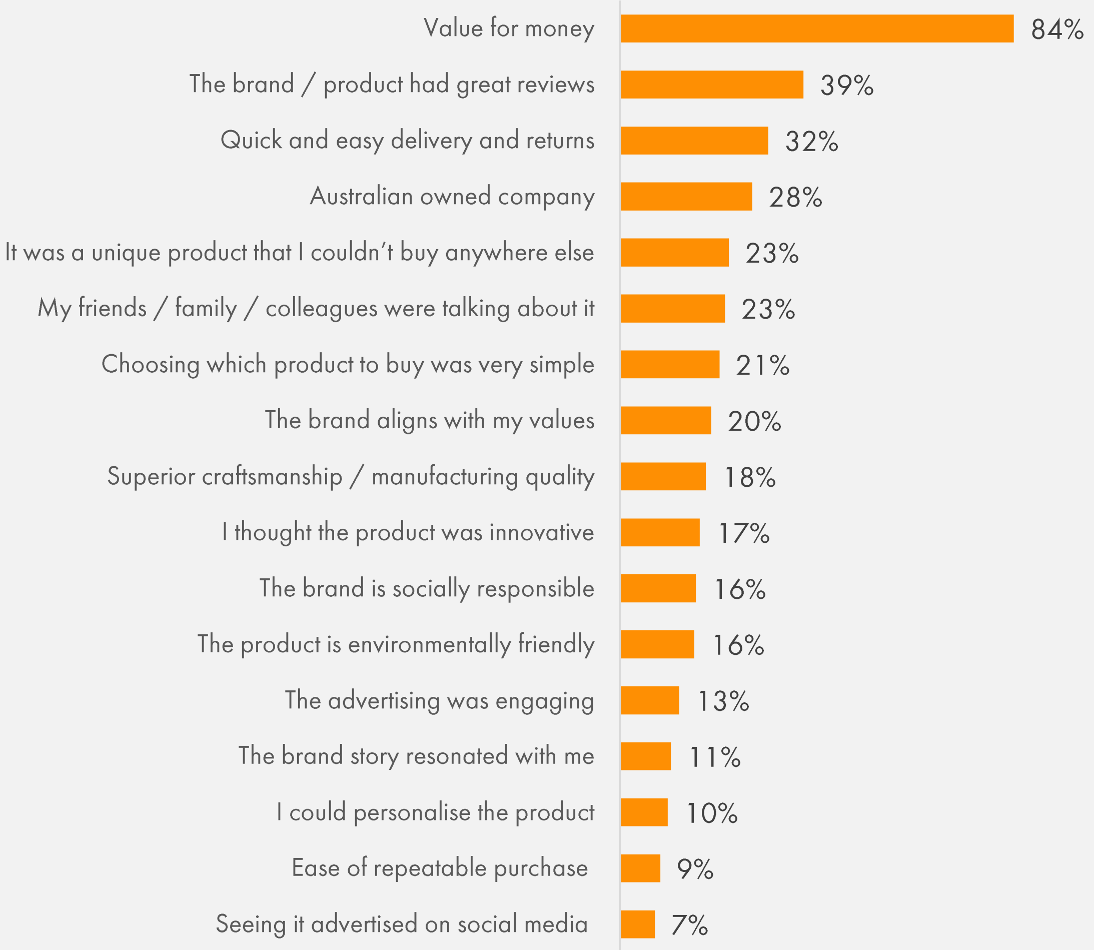
Hygiene factors are also important.

- Hygiene factors such as being simple to buy and having quick and easy returns are also important

Retailers should amplify communication of brand proof points.

- Brand proof points such as innovation, personalisation, socially responsible, environmentally friendly and Australian owned have become compelling reasons for purchasing a brand

reasons for brand choice online



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about what attracts you to buy your favourite brands online, what do you find compelling?

purchasing ethical, sustainable and Australian owned brands is important to online shoppers.

46%

Purchasing from ethical brands is important to me

51%
age 30 to 39

47%

I prefer to buy from brands that I know are sustainable

52%
age 30 to 39

64%

I prefer buying from brands that are Australian owned

80%
age 60 to 70

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Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following? Net agree

retail marketing.

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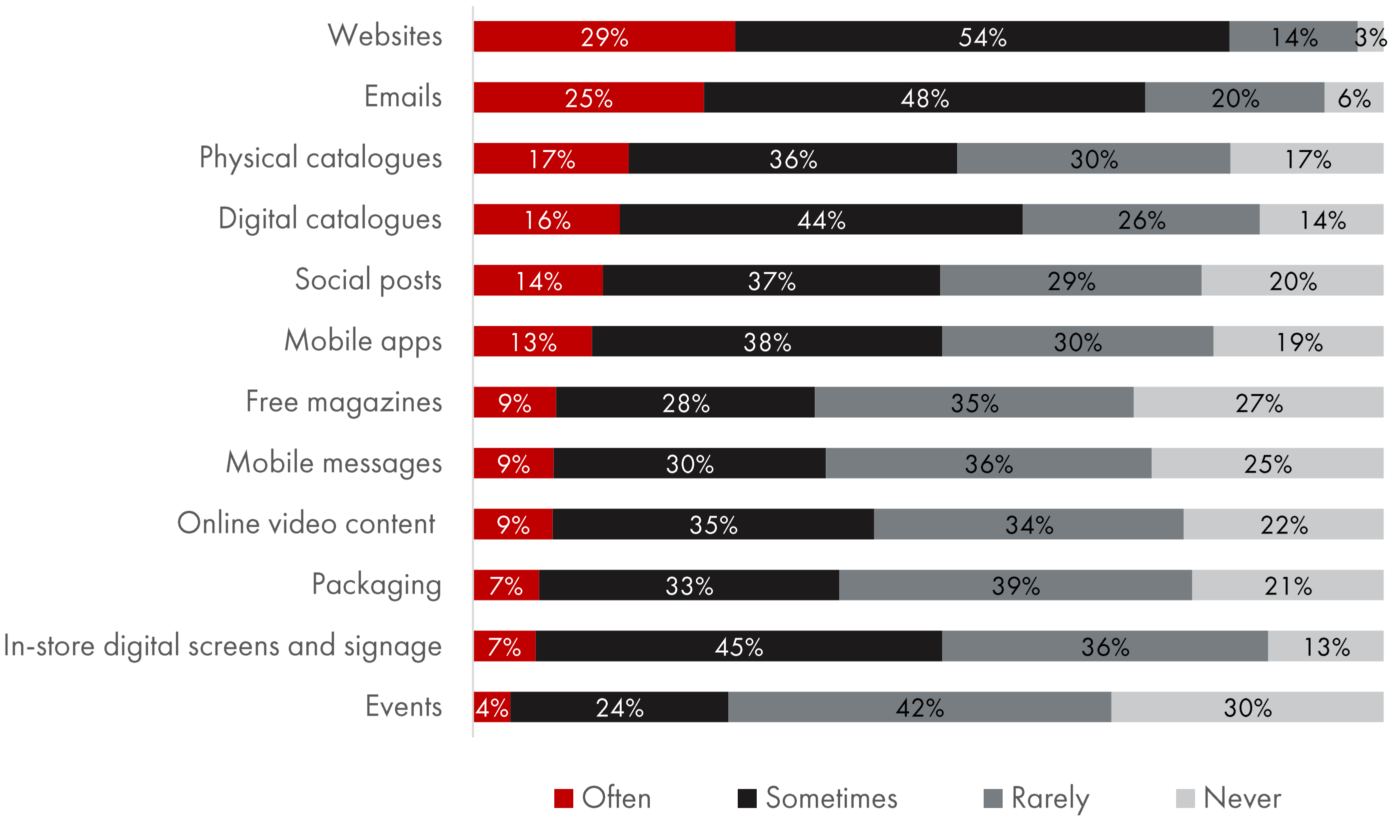
retailer communications consumed.

58% of online shoppers often read content produced by retailers.

- Retailer websites and emails remain the most frequently read content distributed by retailers
- The frequency of reading physical catalogues has declined year on year (often/sometimes reading -8).
- The frequency of reading free magazines has declined year on year (often/sometimes reading -5).

There is a dominance of digital touchpoints which also provide rich behavioural data for retail marketers.

Frequency read content produced and distributed by retailers



rewards programs.

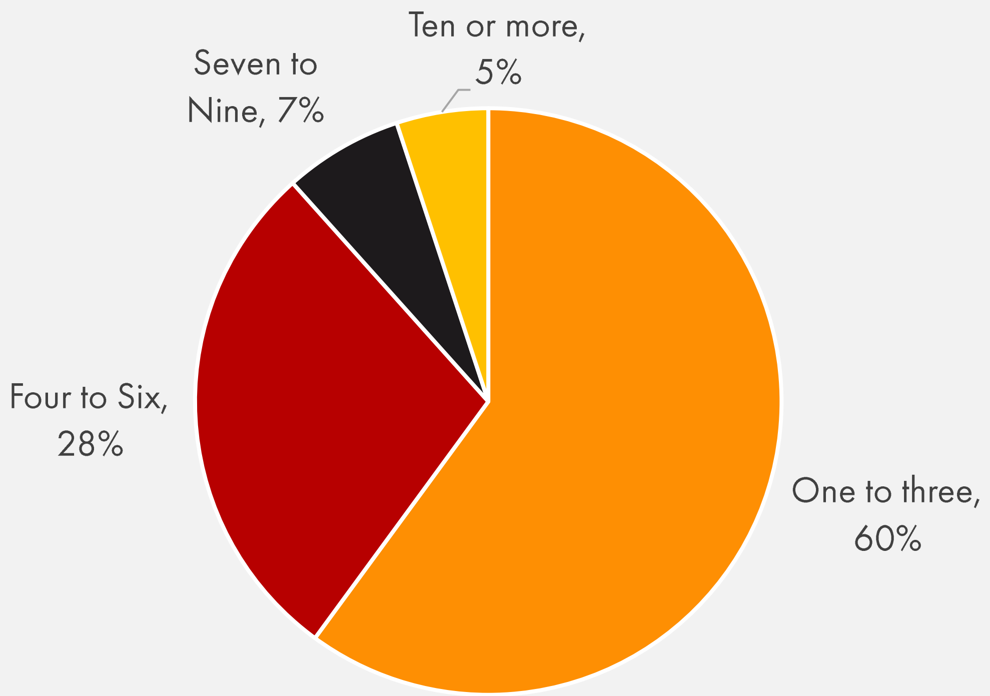
9 in 10 online shoppers remain signed up to at least 1 shopper rewards program.

40% of those signed up to a rewards programs have 4 or more cards (down from 45% last year).

Some profile differences amongst heavy rewards program users (4 or more cards):

- Heavy rewards program users are more likely to be female (49% of females have 4 or more cards, compared to 30% of males)
- Under 50's are more likely to be heavy rewards program users (42% with 4 or more cards), compared to over 50's (36% with 4 or more cards)
- More frequent online shoppers are heavy rewards program users (45% of weekly online shoppers have 4 or more cards)
- 46% of cost-of-living pressured online shoppers (those who strongly agree *"cost of living pressures mean I don't have as much to spend on less essential retail shopping"*) are heavy rewards program users

number of retail loyalty programs or shopper rewards cards signed up to



trust and transparency are key for retailers collecting shopper data.

55% of online shoppers are somewhat or very concerned about retailer's use of data provided via their transactions.

- Similarly, 51% are somewhat or very concerned about retailers' use of data provided via loyalty cards.
- For a further 11% online shoppers, their level of concern depends on how much they trust the particular retailer they are providing data to.
- Level of concern with providing data via loyalty cards has not changed over the last year.

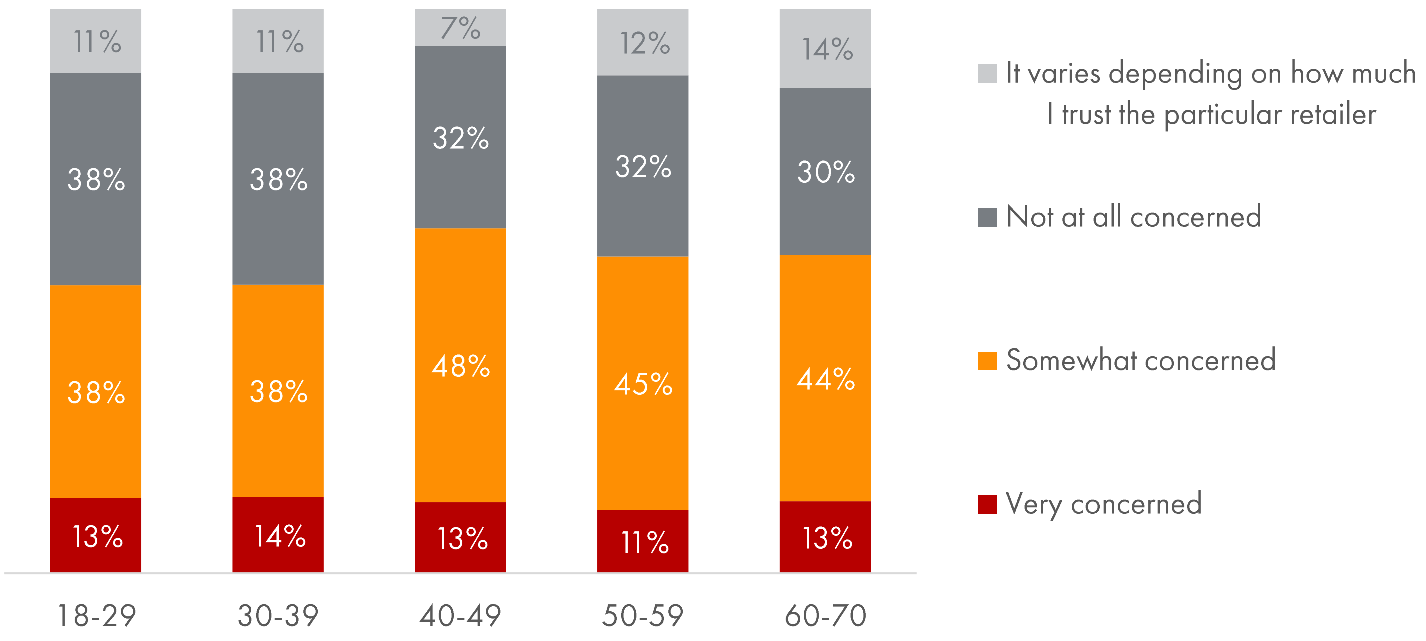
Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)

Q - How concerned are you about how retailers use the data about you that you provide to them via the loyalty program or reward card?

trust and transparency are key for retailers collecting shopper data.

Overall, 55% are somewhat or very concerned about retailer's use of data provided via transactions.
Under 40's, those who have grown up online, have lowered expectations of privacy than older generations. Concern peaks amongst 40 to 49 year olds at 61%.

level of concern about how retailers use personal data



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - How concerned are you about how retailers use the data about you that you provide to them via the loyalty program or reward card?

retailer data usage.

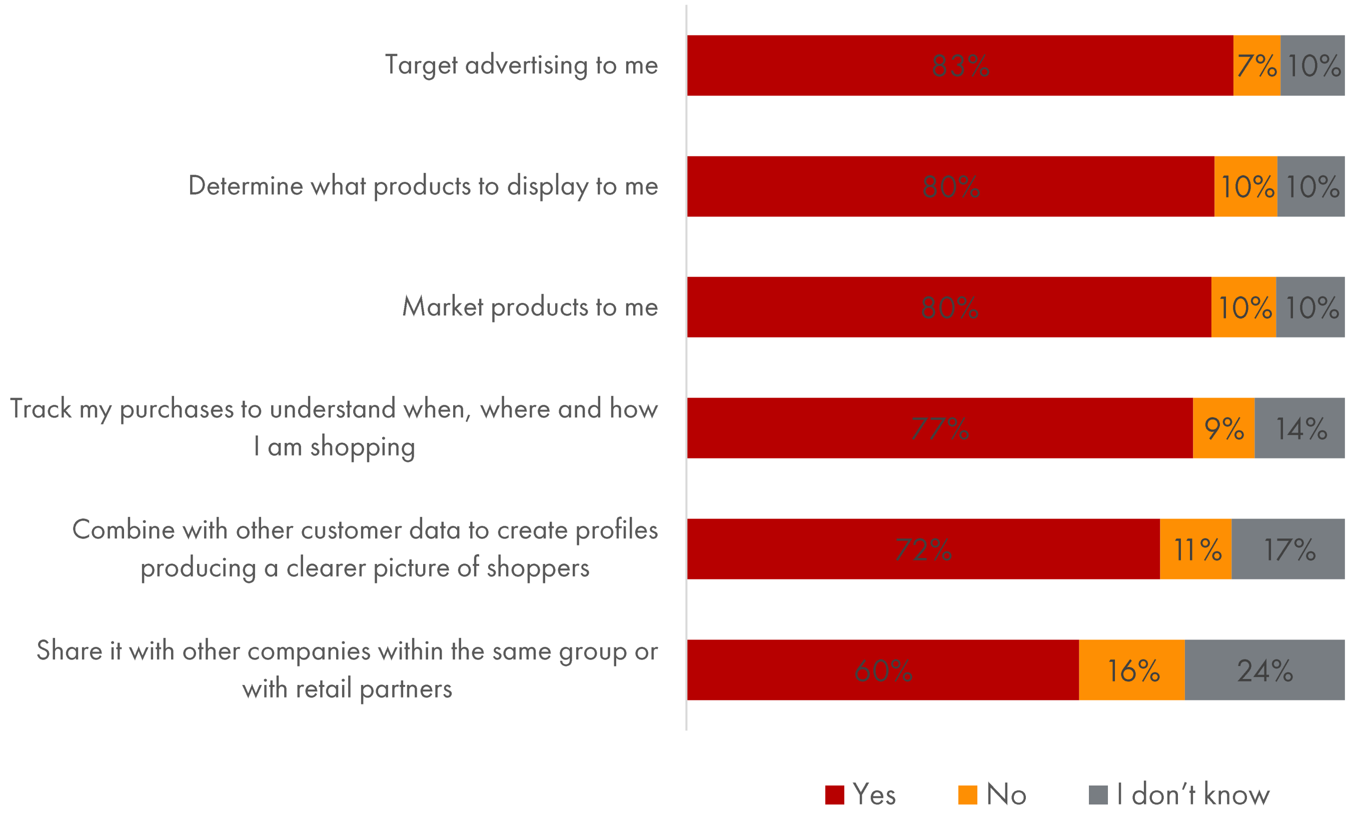
Most online shoppers do understand that their data is used for targeting advertising and marketing.

However, a quarter (24%) of online shoppers don't know whether retailers share their data with other companies.

- Older online shoppers aged 60- 70 are less sure whether their personal data is being shared with other companies (29%) but they are more knowledgeable about all other marketing practices.

Retailers need to ensure they are using clear communication around the data value exchange to make shoppers more comfortable to provide their data.

what do shoppers think retailers do with their data?



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - What do you think the retailers do with the data you are providing them via loyalty cards, transactions or online behaviour?

direct to consumer.

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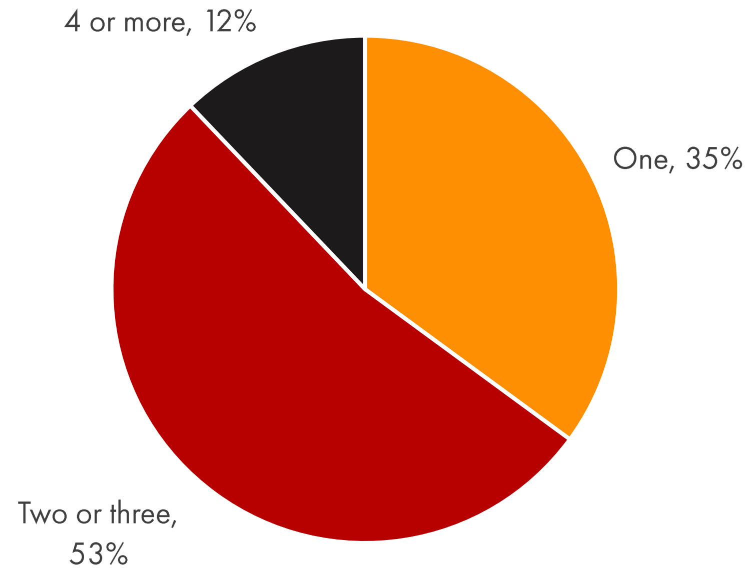
direct brand shopping.

Direct-to consumer brands sell goods entirely or primarily through their owned and operated digital channels. Born and bred online they have nimble business models, strong brand purpose and mission-based marketing.

Nearly half (47%) of online shoppers have purchased a direct brand,

31% of all online shoppers have purchased multiple direct brands.

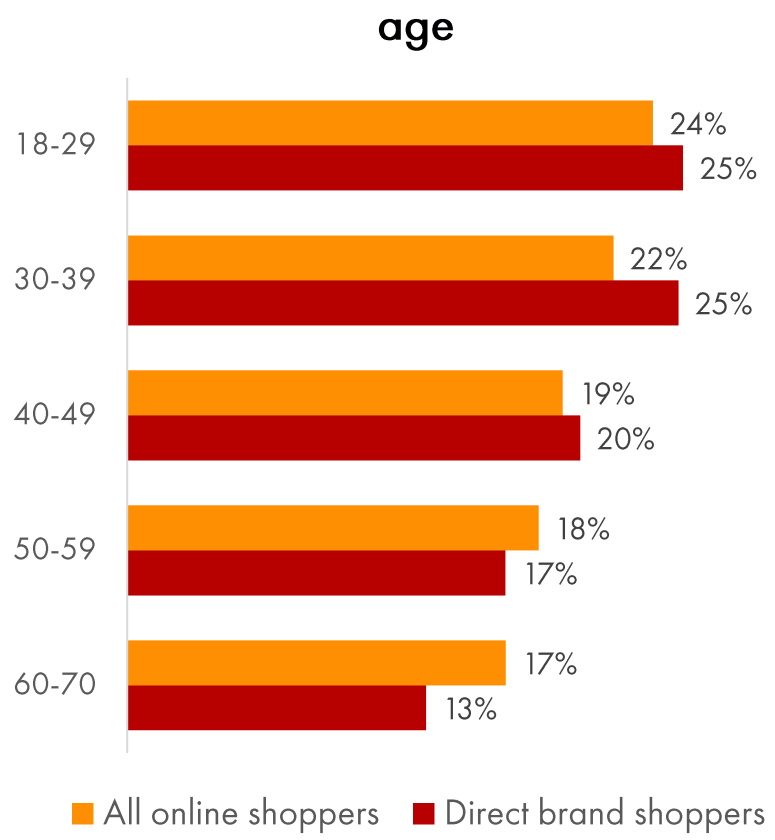
number of different direct brands purchased
(amongst those who have purchased a direct brand in the last 12 months)

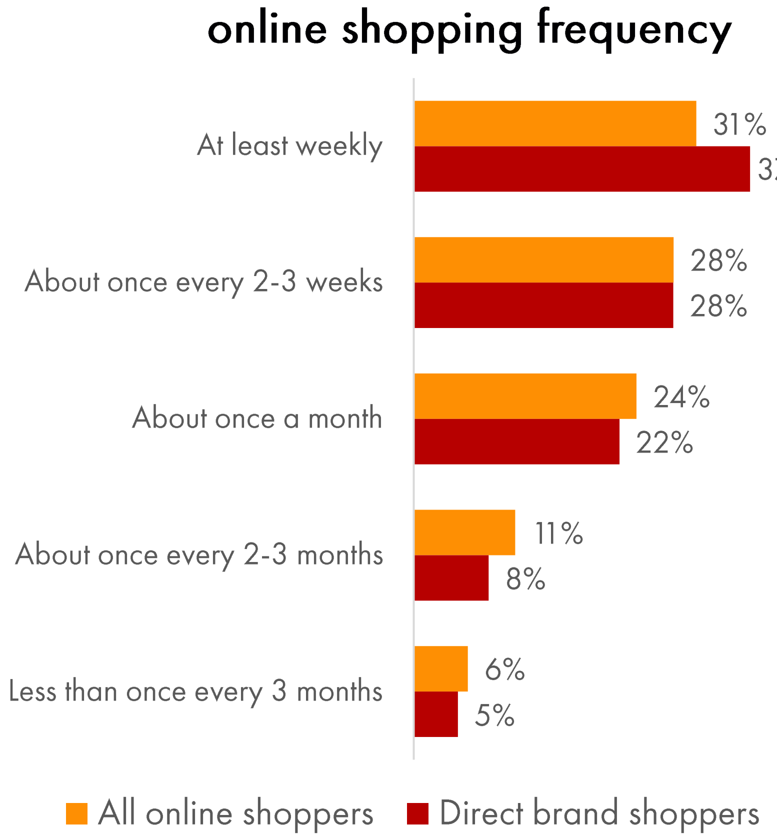


Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - How many different 'direct to consumer' brands have you purchased in the last 12 months? (direct brand shoppers, n=479)

direct brand shoppers.

direct brand shoppers are not just millennials, but they are younger and more frequent online shoppers.

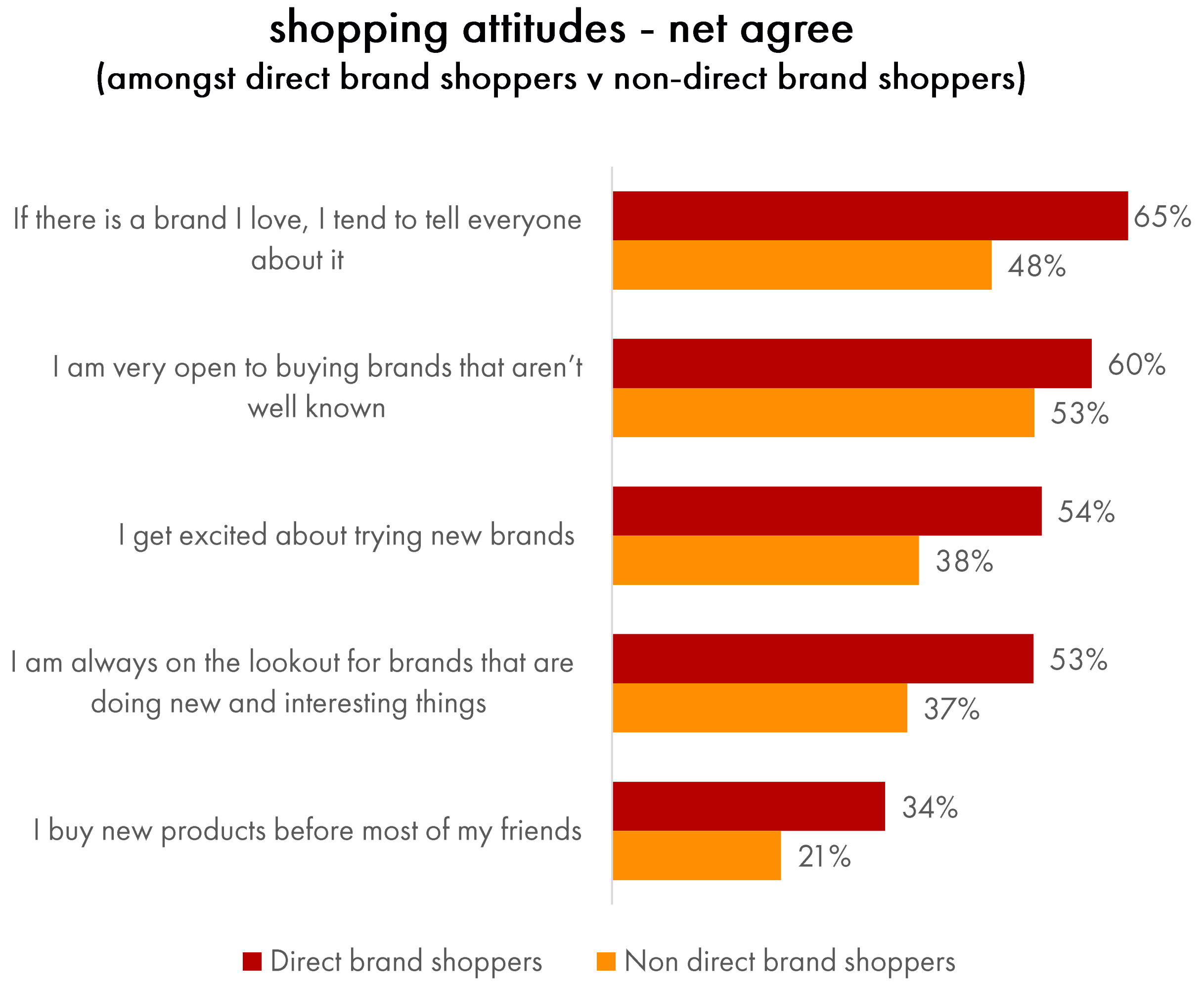




Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - How many different 'direct to consumer' brands have you purchased in the last 12 months? (direct brand shoppers, n=479)

direct brand shopper **attitudes.**

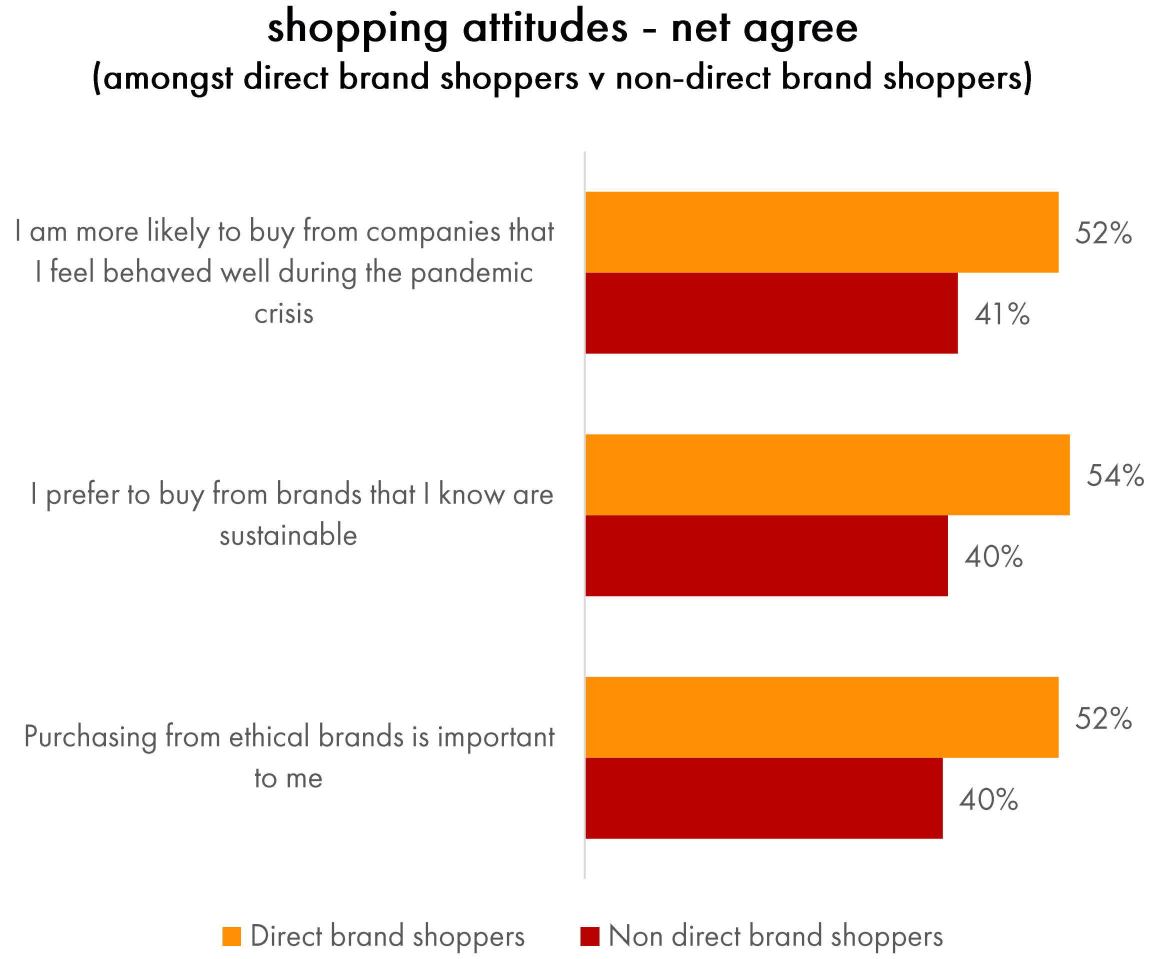
Direct brand shoppers are **more adventurous** when it comes to trying new brands.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q -Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Direct brand shoppers n=479, non direct brand shoppers n=538)

direct brand shopper attitudes.

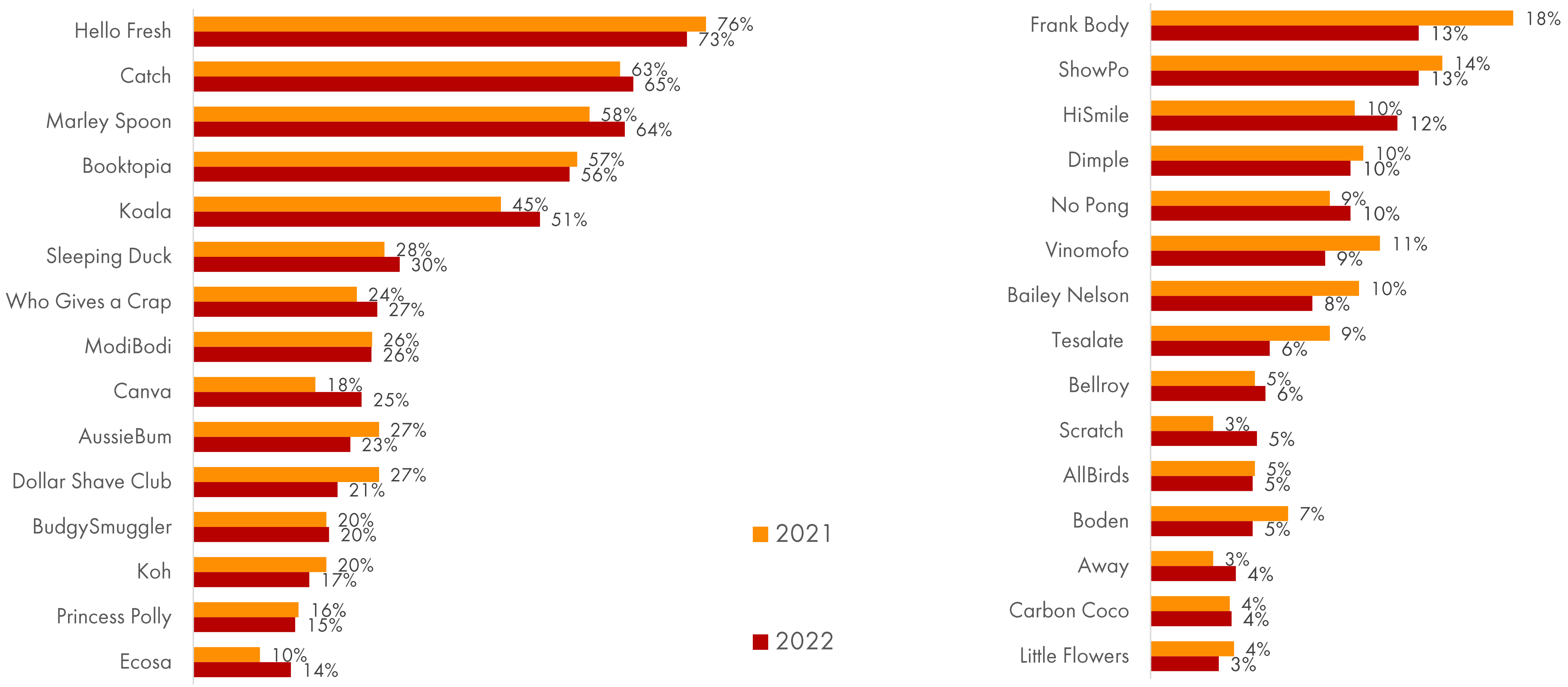
Ethical and sustainable **propositions resonate more** strongly with direct brand shoppers.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Thinking about your shopping over the last 12 months, how much do you agree or disagree with the following? (Direct brand shoppers n=479, non direct brand shoppers n=538)

awareness of direct brands.

Awareness amongst direct brand shoppers has grown for direct brands Canva, Koala, Marley Spoon, Ecosa.



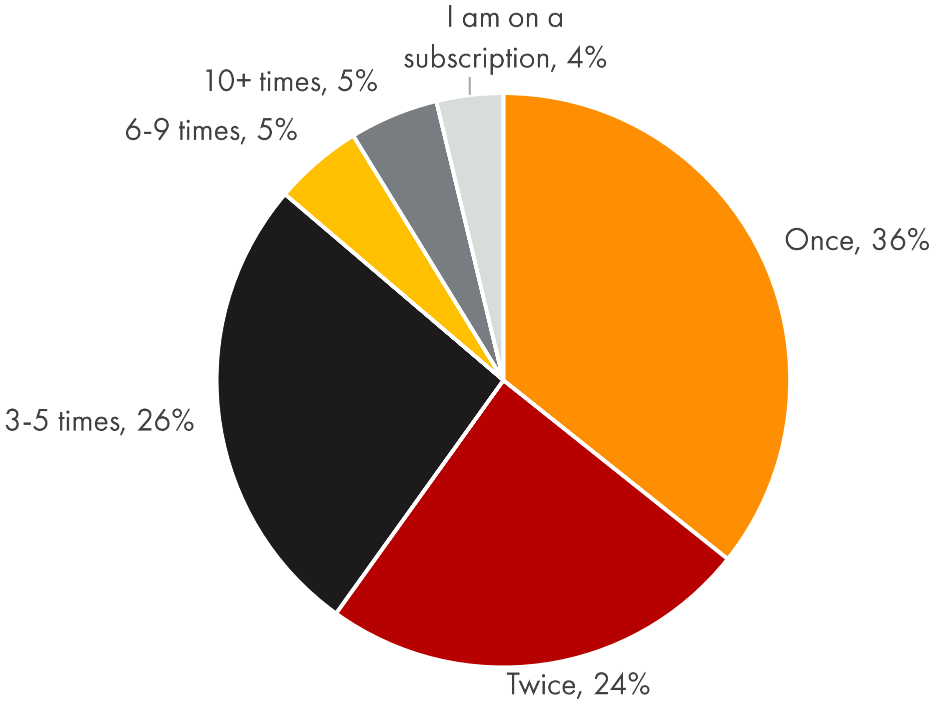
Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q -Which of these brands have you heard of before today? (direct brand shoppers, n=479)

direct brands maintain customer loyalty.

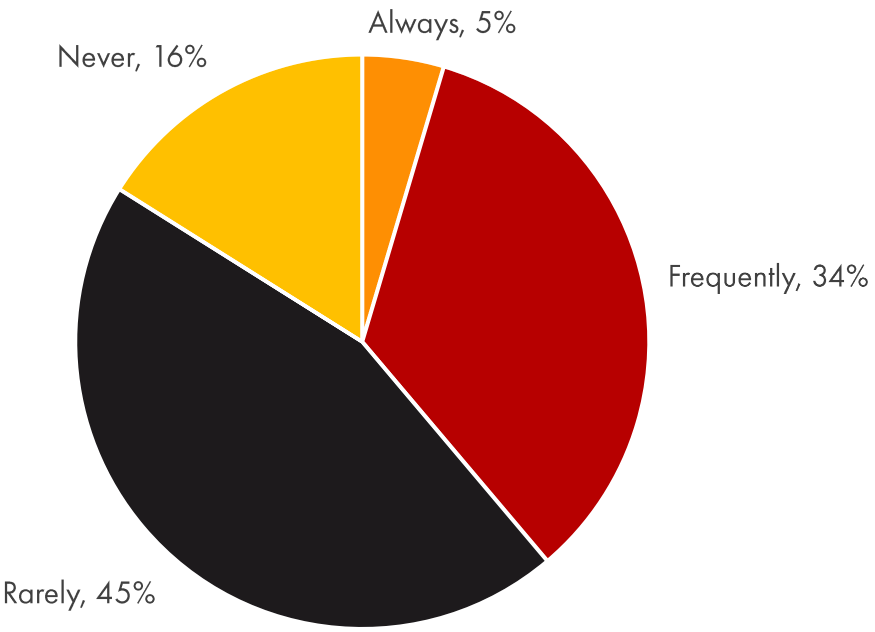
64% have purchased their favourite direct brand on multiple occasions

61% would rarely or never buy their favourite direct brand product from different business

frequency favorite direct brand purchased
(amongst those who have purchased a direct brand in the last 12 months)



frequency of buying product from a different business
(amongst those who have purchased a direct brand in the last 12 months)

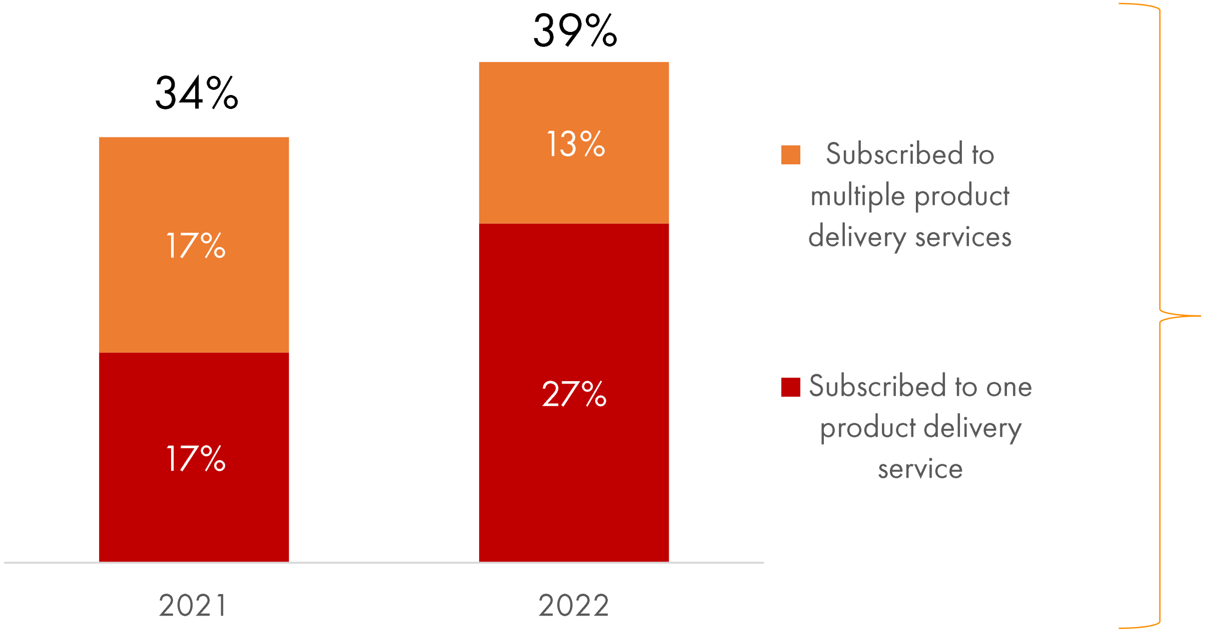


Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022. (n=1,000 per wave) Q -Thinking about your favourite 'direct-to consumer' brand, how many times have you bought from this brand? ; Again, thinking about your favourite 'direct-to-consumer' brand, how often do you also buy this product from a different business? (direct brand shoppers, n=479)

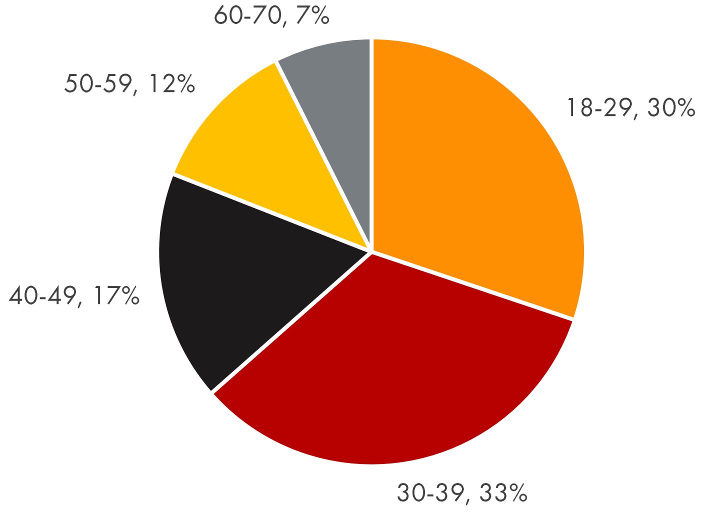
direct brand subscription trends.

4 in 10 direct brand shoppers are subscribed to a product delivery service (e.g. for meals, cleaning products, toilet paper, wine etc. There is a slight increase (+4) in subscribers year on year.

subscription to product delivery services
(amongst those who have purchased a direct brand in the last 12 months)



amongst subscribers 63% are aged under 40.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - Are you currently subscribed to any product delivery services (e.g. meals, cleaning products, toilet paper, wine etc)? (direct brand shoppers, n=479)

direct brand subscription trends.

4 in 10

direct brand shoppers are subscribed to a product delivery service, with **convenience** the main driver of subscription.

what is liked about subscription delivery services
(amongst those who have a subscription)

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Pureprofile

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)
Q - What do you like about product delivery services? (direct brand shoppers, n=479)

key takeaways.

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Five key takeaways for ecommerce.

1.
Steady growth in online retail is expected to continue even as shoppers return instore, however retailers will likely need strategies to overcome consumer hesitancy if cost-of living pressures continue to increase.

2.
Convenience and value for money are the key drivers of online shopping and brand choice. Positive omnichannel experiences are needed to reinforce behaviours as shoppers have returned instore.

3.
Retailers should amplify communication of brand proof points (e.g. innovation, personalisation, ethical and sustainable credentials) as these are compelling reasons for brand choice.

4.
Retailers should continually build trust with shoppers as it can overcome price barriers and is key to consumers being more comfortable in sharing data valuable to retailer marketing.

5.
There are a range of digital channels consumers are using to discover brands and for retailers to communicate their brand story. Advertisers that continue to invest in brand building during economic downturn will come out in a stronger position.

Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022 (n=1,000 per wave)

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