2026 Marketplace Consumer Report

Australia's Most Comprehensive Marketplace and Digital Commerce Consumer Study

8th Edition | February 2026

pattern

Contents

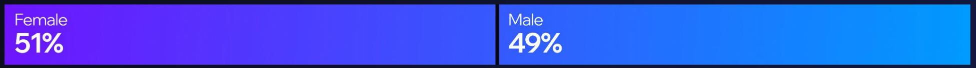
Pattern worked with OnePoll to survey 1,000 Australian consumers during November 2025.

Responses were collected online, and the survey was restricted to adults who had shopped online in the past 12 months ensuring there was a representative sample of age, gender, and location achieved.

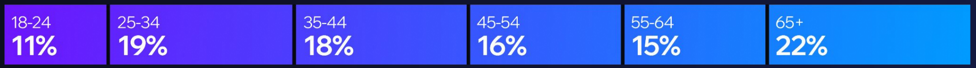
We conducted this research for the benefit of the consumer brands we represent as an authorised Amazon Seller in Australia, as well as the many consulting clients we provide with strategic ecommerce support. The report is written for brand leaders, CEOs, Country Managers and Founders responsible for driving growth in the Australian market.

For more information on how we can support your ecommerce acceleration please contact us at au@pattern.com or visit au.pattern.com.

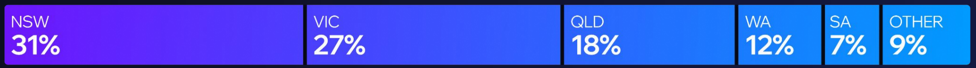
Gender



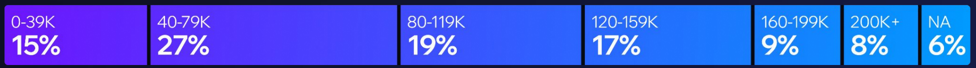
Age



State



Household Income



Executive Summary

Marketplaces Are Now Central to Brand Growth in Australia

The findings of this report confirm a dominant truth of the market: marketplaces now sit at the centre of how Australian consumers discover, evaluate and purchase products. Among them, Amazon has firmly established itself as the leading marketplace, shaping consumer expectations around range, trust, convenience and repeat purchasing. Brands that do not actively consider marketplaces as part of their go-to-market strategy are increasingly exposed to loss of control, missed demand and competitive displacement.

Discovery Is Changing, but Marketplaces Still Decide

How consumers discover products is fragmenting. Google remains the primary starting point for product search, with 54% of consumers beginning their journey on the platform, and was one of only two channels to grow year on year. Social media platforms also recorded meaningful growth, increasing 67% year on year, though they still account for just 5% of first-touch discovery.

This shift reflects growing comfort with discovery beyond traditional search, driven by social feeds, creators and emerging AI tools. However, while discovery is diversifying, conversion is consolidating. Marketplaces continue to be where intent is validated and decisions are made, with Amazon increasingly acting as the final checkpoint before purchase.

Social commerce is gaining momentum, but trust and familiarity still anchor the majority of transactions to established marketplace environments.

Amazon Extends Its Lead as the Market Consolidates

Amazon remains the clear front runner in the Australian marketplace landscape. Sixty percent of consumers purchased from Amazon in the past 12 months, up 3% year on year. Looking ahead, 66% plan to buy from Amazon in the next 12 months, the strongest future intent score of any marketplace.

By contrast, eBay continues to lose relevance, declining to 51% usage, down 7% year on year, with purchase intent set to fall further in the year ahead. Kogan faces more material risk, with intent projected to decline by 10% to just 19% in 2026. Following the exit of Catch and MyDeal in 2025, the data suggests Kogan may be the next marketplace under pressure unless it meaningfully reinvents its proposition.

Newer platforms continue to reshape expectations. Temu's rapid growth appears to be stabilising, with 47% of consumers reporting they have shopped on the platform in the past 12 months, marking its lowest growth rate since entering the market (+2% compared to our 2025 report).

Shein, however, is accelerating. Its expansion beyond fashion into broader lifestyle categories has driven a 15% year-on-year increase in usage, lifting it to 30% of consumers shopping on the platform and strengthening its relevance with Australian consumers.

Trust Is Expanding, but Leadership Remains Clear

Trust in product quality is rising across all marketplaces, particularly among newer platforms. Temu and Shein recorded the fastest growth in quality confidence year on year, reflecting improving logistics, clearer quality signals and growing familiarity.

Despite this shift, Amazon continues to lead decisively. Sixty-four percent of consumers identify Amazon as the marketplace they trust most for product quality, up 7% year on year. This leadership is reinforced by delivery reliability, brand protection mechanisms, and a growing ecosystem of verified sellers. While trust is broadening, Amazon remains the benchmark against which all others are measured.

Category Behaviour Highlights Platform Strengths and Risk

Consumer purchasing behaviour reveals where marketplaces are winning and where brands face exposure. Amazon continues to dominate research-led categories such as electronics, home and kitchen, and automotive parts, with strong year-on-year growth in complex purchase categories.

Temu and Shein are reshaping expectations in fashion and adjacent categories. Temu (24%) and Shein (20%) lead clothing and accessories, while also seeing rapid growth in beauty, haircare and wellness as its range expands.

By contrast, traditional marketplaces are losing ground in their historic strongholds. eBay's electronics and automotive categories are declining, while Kogan's core electronics category has experienced a multi-year downturn. These shifts highlight accelerating consolidation toward platforms that combine range, value and consistent experience.

Amazon Is Becoming a Discovery Engine, Not Just a Channel

Amazon's role in the consumer journey is expanding beyond conversion. Nearly half of consumers report visiting a brand's own website after first discovering it on Amazon, a significant increase since the last report. This positions Amazon as both a demand driver and a referral engine, influencing brand discovery even when the final purchase occurs elsewhere.

At the same time, shopper behaviour on Amazon is becoming more substitution-friendly. When a preferred brand is unavailable, fewer consumers search elsewhere. Instead, many purchase a similar product directly on Amazon, including from brands they do not yet know. The marketplace is increasingly the moment of decision, not just consideration.

Control Is the New Competitive Advantage

While many consumers still say the seller name does not influence their purchase decision, sensitivity to seller identity is rising. This reflects growing awareness of third-party sellers and increased reliance on trust signals.

Negative experiences on Amazon are also increasing, particularly where brands lack control of their distribution. Consumers report higher instances where the Buy Box was not visible, expired products, counterfeit items, incorrect packaging and mismatched imagery. These are not failures of the platform, but symptoms of unmanaged presence. Brands that believe they are “not on Amazon” are often already present through unauthorised sellers, exposing them to reputational and commercial risk.

The Strategic Imperative for Brands in 2026

In 2026, brands that win will be those that treat marketplaces as a core component of their go-to-market strategy, not a secondary channel. Amazon’s continued growth in repeat purchasing, spend and Prime adoption reinforces its role as a habitual shopping destination rather than a discretionary one.

The risk is no longer whether to be on marketplaces, but how. Brands that fail to actively manage presence, pricing, content and authorised distribution risk losing control at the exact moment consumers are making decisions. As discovery fragments and marketplace consolidation accelerates, strategic, well-governed marketplace participation is becoming a prerequisite for sustainable growth in the Australian market.

State of Australian Ecommerce

Measuring the evolution of ecommerce adoption and spend in Australia

Intensifying Competition Is Reshaping Australia's Ecommerce Landscape

Australia's online shopping landscape is becoming increasingly competitive, with global marketplaces intensifying pressure on local players. Amazon continues to strengthen its leadership position, while fast-growing platforms such as Temu are reshaping price expectations and competitive dynamics. In contrast, long-established local retailers are struggling to keep pace, highlighted by the closure of My Deal and Catch in early 2025.

Competition is accelerating. Amazon launched its Haul storefront in August 2024 to counter Temu's rapid growth, while Temu responded in 2025 by opening its platform to Australian sellers, signalling a shift from pure cross-border disruption to deeper local market participation. At the same time, advancements in ecommerce infrastructure, including AI-driven discovery, chatbots and personalised recommendations, are further evolving how consumers shop online.

Together, these forces are pushing Australia's ecommerce market into a new phase of more intense competition, greater sophistication and continued growth.

Source: Australian ecommerce revenue (in AUD Millions), ECDB, January, 2026

+13%

According to NAB Data, Australian online retail sales grew by 13% year on year in 2025.

NAB Online Retail Sales Index

+81%

of Australians shop online each month, reflecting a shift from occasional ecommerce usage to habitual, embedded behaviour across households.

Statista

+22%

Ecommerce is forecast to account for approximately 22% of total Australian retail spend by 2030

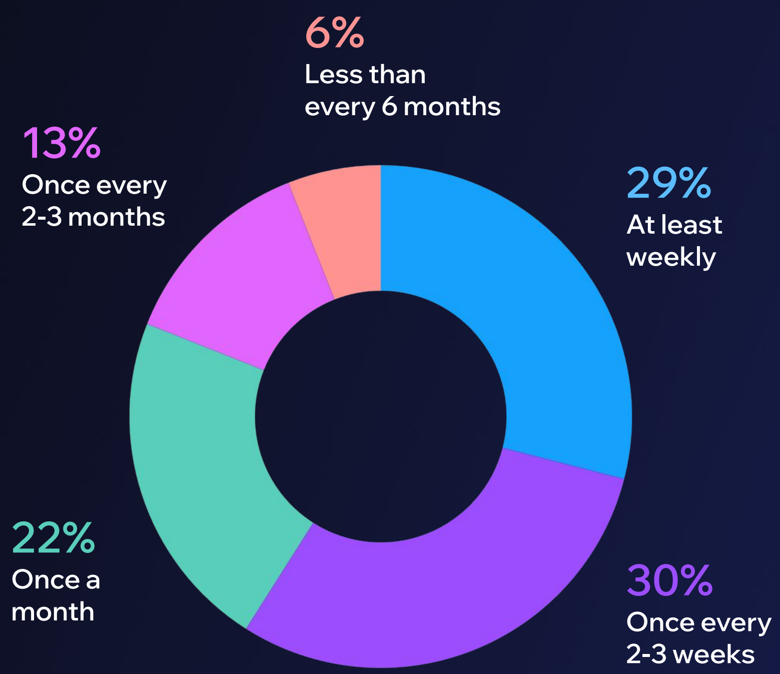
ECDB

Australian Ecommerce Enters a More Stable Growth Phase

Australian ecommerce spending is settling into a more regular, habitual rhythm rather than retreating. External research shows that online non-grocery shopping is already well embedded, with 30% of Australians purchasing online every two to three weeks.

According to our recent consumer research, sentiment remains resilient heading into 2026. While 42% of consumers expect their online spend to stay the same, nearly 40% plan to spend more, including a growing share who expect to spend a lot more than last year.

Our data also shows that 65% of consumers anticipate changes in their shopping habits, driven less by reduced spending and more by shifts in where and what they buy. Notably, there has been a significant increase in consumers planning to buy different products from Amazon.com.au than they have previously, signalling that ecommerce growth is increasingly being driven by behavioural change rather than pure volume expansion.

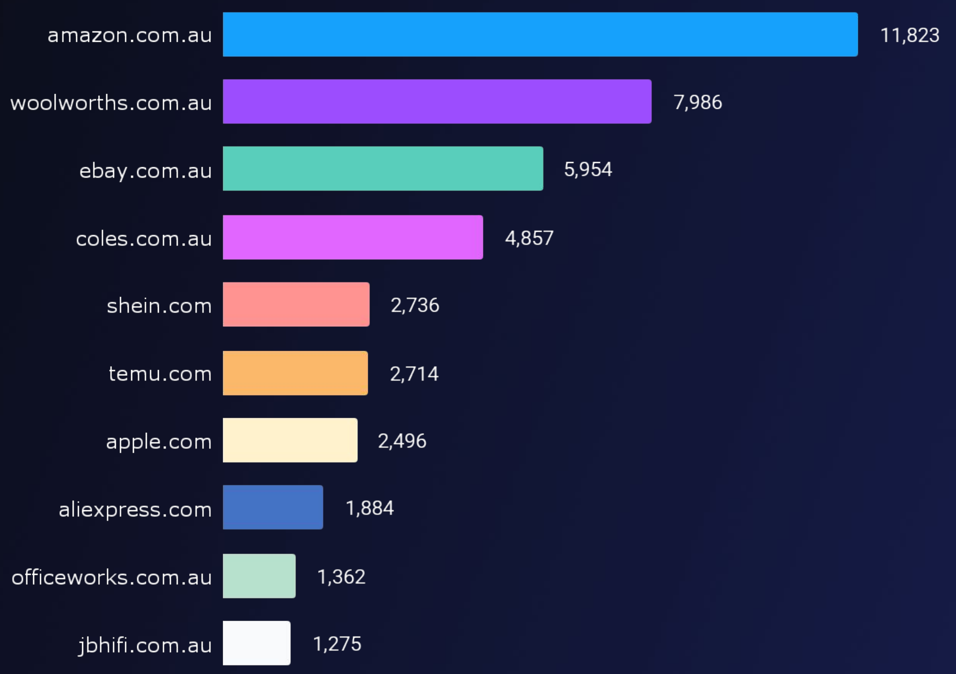


Source: Frequency of online non-grocery shopping among consumers Australia 2025 (Statista)

Australian Ecommerce Spend Is Stabilising, Not Slowing

Based on ECDB data for the Top E-Commerce Stores in Australia, Amazon emerges as the clear front-runner for where Australians are spending online. Amazon.com.au ranks #1 with almost US$7.9bn in Australian GMV, materially ahead of all other local and global competitors.

While Woolworths and Coles continue to capture a significant share of online grocery spend, and platforms like Shein and Temu are accelerating in fashion, Amazon's scale, category breadth and strong year-on-year growth reinforce its position as the most influential online retail destination in Australia.



Source: Australian ecommerce market - Top Stores by 2024 GMV (AUD Millions)
2025 full year data was not available at the time of print

Marketplaces in Australia

A focused view of the marketplaces defining Australian retail today

Australia's Marketplace Landscape: Winners, Challengers and Risks

Australia's marketplace landscape is increasingly concentrated, with clear winners and mounting pressure on mid-tier players.

Amazon remains the dominant force, with 60% of consumers purchasing on the platform in 2025 and 66% planning to buy there in future. Growth is being driven less by price and speed and more by preference, reviews, inspiration, and repeat behaviour, with nearly all shoppers (95%) purchasing multiple times per year and a growing cohort buying very frequently.

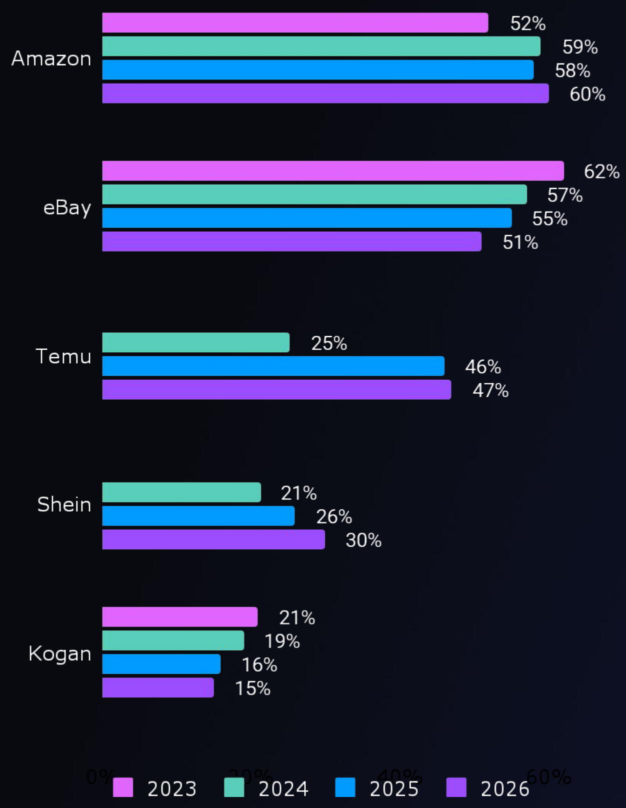
eBay continues to lose relevance as usage and intent decline, while Shein is the clear growth leader, expanding beyond fashion and lifting both trust and purchase intent. Temu remains widely used but shows signs of maturity as growth slows, and Kogan continues to fall behind, with weakening category strength and future intent

93%

of Australians surveyed shopped on a marketplace in the past **12 months**

**According to Pattern's 2026 Marketplace Consumer Report*

Which of the following marketplaces have you bought from in the past 12 months?



Marketplace Preference Is Consolidating

Marketplace preference continues to shift. Amazon has grown from 52% in our 2023 research to 60% in our 2026 report, reinforcing its position as Australia's most trusted marketplace, while eBay shows a steady decline from 62%t to 51% over the same period, reflecting changing consumer expectations and usage patterns.

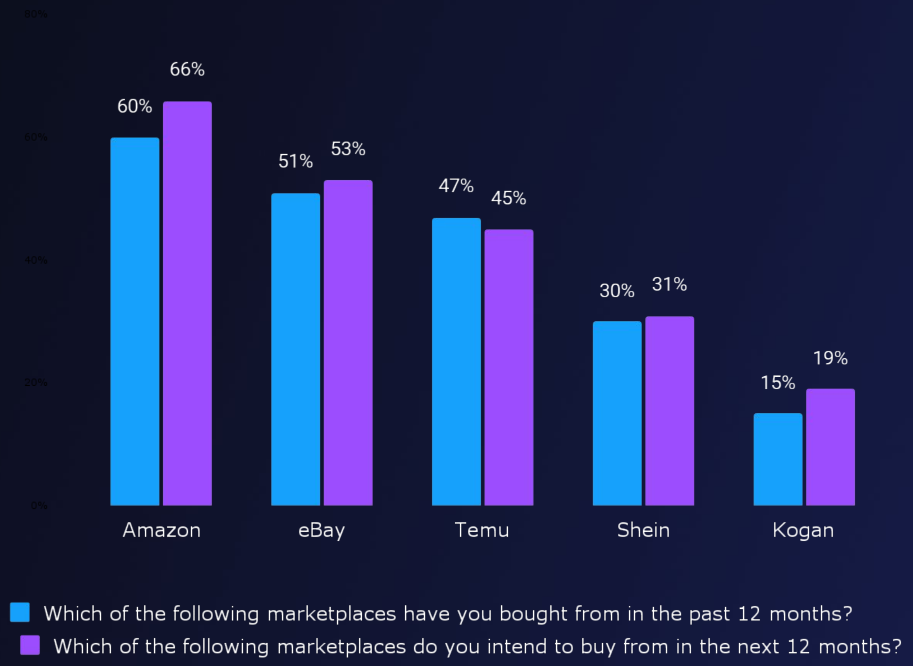
New challengers Temu and Shein have rapidly reshaped the landscape, with Temu jumping from 25% to 47% in three years and Shein increasing from 21% to 30% as both expand category breadth and value propositions.

Kogan continues its gradual softening, while the exit of Catch and MyDeal accelerates consolidation toward fewer, larger platforms, increasing both opportunity and competitive pressure for brands.

Amazon's Lead Widens as Shopper Intent Grows

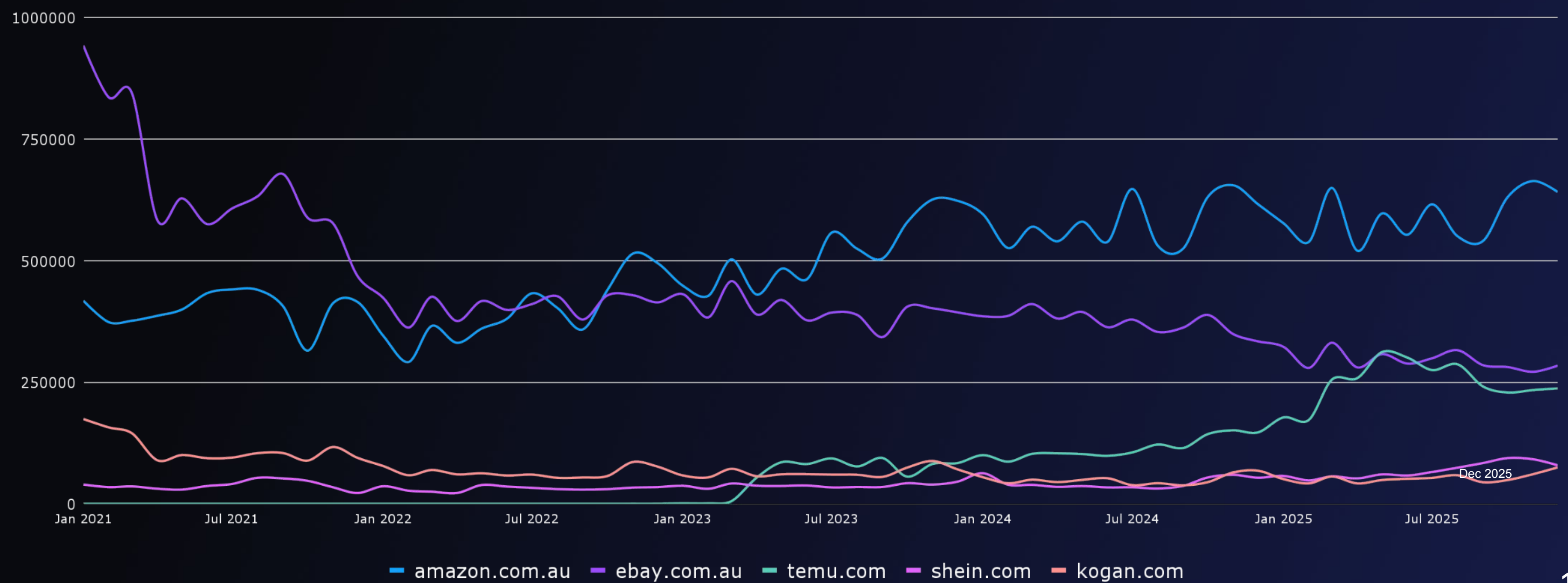
Looking ahead, Amazon is set to see the biggest uplift in marketplace demand. Sixty-six percent of consumers say they plan to buy from Amazon in the next 12 months, up from 60% who purchased in 2025, signalling continued momentum and growing reliance on the platform. eBay and Kogan see only modest gains in purchase intent by comparison.

Temu and Shein remain steady, with only marginal shifts. Overall, the data shows Amazon widening its lead as the marketplace Australians are most likely to return to, reinforcing its position as the most entrenched and reliable destination for online shopping.



Long-Term Marketplace Traffic Trends in Australia

Since 2021, Australian marketplace traffic has structurally shifted. Amazon has lifted its baseline from around 40 million monthly visits in 2021 to consistently exceeding 60 million during peak periods in 2024 and 2025, while eBay has declined from the mid-90 million monthly visits in early 2021 to the high-20 million range by late 2025. In contrast, Temu and Shein have scaled rapidly following Temu's launch in Australia in September 2022, driven by value-led propositions and aggressive advertising investment. Temu reached peaks above 30 million monthly visits shortly after launch, while Shein has intensified brand-building activity through heavy media investment, including out-of-home and pop-up activations.



Source: SEM Rush Traffic Analysis (excluding app traffic)

2026 Marketplace Profiles

Platform overviews, shopper demographics and top categories

Amazon

According to Roy Morgan, Amazon's Australian customer base grew 11% in June 2025, adding approximately 900,000 users to reach an estimated 8.8 million active shoppers, equivalent to around one-third of the population. This growth underscores Amazon's increasing role as a habitual shopping destination for Australian consumers, supported by the scale and stickiness of its Prime ecosystem, now estimated at around 5.1 million members, surpassing the subscriber base of several local retail programs, including Wesfarmers OnePass.

Intensifying competition from value-focused platforms such as Temu and Shein has pushed Amazon to respond more directly at the lower end of the market. The launch of Haul in Australia in August 2025 introduces price caps and direct-from-manufacturer fulfilment, allowing Amazon to compete on value while maintaining control of its broader ecosystem.

Amazon is deepening its local footprint with a A$1.6 billion investment in new operational sites across Sydney, Melbourne and Brisbane, creating more than 4,500 jobs by 2026 and reinforcing its long-term ambitions in Australia.

Consumer Demographics

60%

Of Australian shoppers surveyed bought in the past 12 months

25-34 *years*

Are strongly over-indexed, with 76% buying from the platform in the last 12 months

65%

Of males bought from Amazon vs 56% of females

$200k+

76% of households earning over $200k bought from Amazon

66%

Have access to Prime or plan to in the next twelve months

Top 10 categories in 2026

Which of the following product categories do you expect to purchase online in 2026, and where will you buy from?

eBay

In 2025, eBay attracted around 29 million monthly site visits and has around 12 million monthly users. While it is no longer the primary destination for everyday household staples, eBay has evolved into a high-trust platform for more complex transactions, spanning automotive parts, luxury goods and collectibles.

This repositioning has become more urgent amid intensifying competition from cross-border disruptors. Data from late 2024 and 2025 shows that Temu and Shein have reset price expectations for Australian consumers, with Temu alone reaching 4.7 million annual buyers. In response, eBay has doubled down on its “Focus Categories” strategy.

Central to this approach is the “Recommerce Revolution.” eBay’s 2025 Recommerce Report found that 89% of consumers plan to maintain or increase spending on pre-loved goods, reflecting not just sustainability values but a pragmatic response to cost-of-living pressures. At the same time, the State of Collectables Report 2025 estimates Australians hold $16.8 billion in collectible assets, a segment where eBay is uniquely positioned to capture value.

Consumer Demographics

51%

Of Australian shoppers surveyed purchased in the past 12 months

35-44 *years*

Over indexed as customers with 58% of this group buying from the platform in the last 12 months

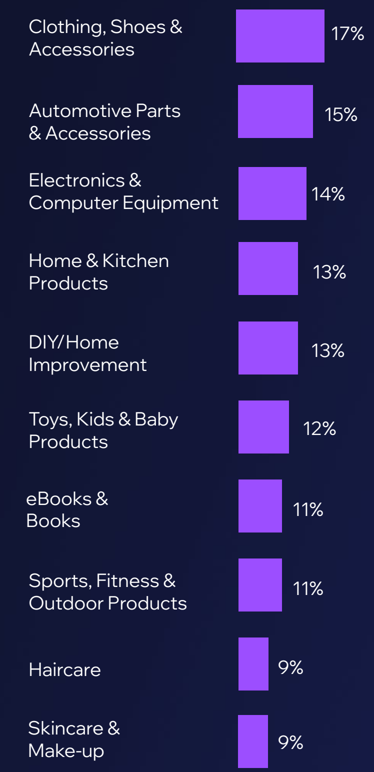
58%

Of males bought from eBay vs 44% of females

56%

Of surveyed shoppers with a household income of $160-$199k bought from ebay in the past 12 months

Top 10 categories in 2026



Which of the following product categories do you expect to purchase online in 2026, and where will you buy from?

Temu

Temu has moved beyond the role of a short-term disruptor to become a significant structural player within Australia's ecommerce landscape. Roy Morgan estimates the platform generated A$2.6 billion in sales in the 12 months to June 2025, supported by a customer base of 4.7 million Australians, representing year-on-year growth of 24%.

By 2025, consumer resistance to purchasing goods directly from overseas manufacturers has materially declined. Improvements in cross-border logistics, combined with sustained price differentials, have reduced perceived friction, even where delivery times remain longer than domestic alternatives. This behaviour spans income segments, with high-income households and customers of premium department stores such as David Jones and Myer increasingly using Temu for commoditised, low-risk purchases where brand provenance is less influential.

In the June quarter of 2025, Temu ranked as Australia's largest digital advertiser, increasing advertising expenditure by 20% quarter-on-quarter while other markets scaled back. This concentration of spend has contributed to rising CPMs across major digital platforms, including Meta and Google.

Consumer Demographics

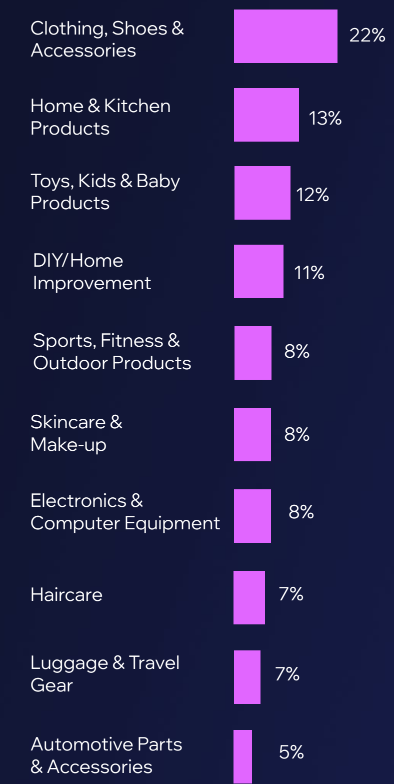
47%
Of Australian shoppers surveyed bought in the past 12 months

65+ *years*
Over indexed as customers with 53% of this group buying from the platform in the last 12 months

51%
Of females bought from Temu vs 44% of males

$200k+
41% of households earning over $200k bought from Temu

Top 10 categories in 2026



Which of the following product categories do you expect to purchase online in 2026, and where will you buy from?

Shein

Shein has evolved from a volatile market entrant into an established player in Australia's ecommerce landscape, reshaping consumer expectations around price, speed and product breadth. Roy Morgan estimates the platform generated A$1.3 billion in sales in the 12 months to June 2025. Shein now serves approximately 2.6 million Australian shoppers, with penetration increasing 27% year-on-year as at June 2025. Engagement levels remain high, with 76% of customers classified as repeat purchasers.

As competition from Temu has intensified, Shein has expanded beyond its core apparel focus. This diversification has been accompanied by deliberate efforts to strengthen brand legitimacy through physical and hybrid retail experiences. In 2025, Shein invested in large-scale activations, including the Café Shein FW25 pop-up in Parramatta, Sydney and the Spring/Summer 2025 Fashion Fair at the Sydney Overseas Passenger Terminal.

In the second half of 2025, reports indicated that Shein had confidentially filed for an IPO in Hong Kong. For the Australian market, a potential listing is significant, as it would provide access to capital to support continued discounting, marketing investment and competitive positioning locally.

Consumer Demographics

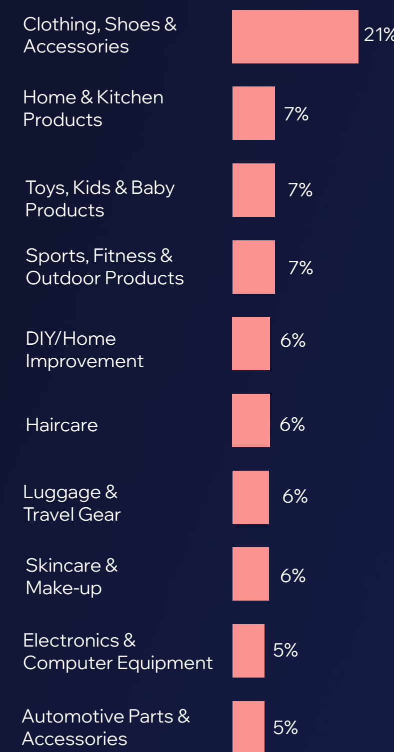
30%
Of Australian shoppers surveyed bought in the past 12 months

18-24 *years*
Over indexed as customers with 55% of this group buying from the platform in the last 12 months

40%
Of females bought from Shein vs 20% of males

$200k+
32% of households earning over $200k bought from Shein

Top 10 categories in 2026



Which of the following product categories do you expect to purchase online in 2026, and where will you buy from?

Kogan

Kogan.com has continued its transition from a pure-play electronics retailer into a diversified digital platform. In FY25, the company reported a 15% year-on-year increase in gross sales to A$931 million, expanded its active customer base to 3.5 million, and delivered gross profit of A$190 million. Following the stabilisation observed in FY24, Kogan has entered a renewed phase of customer acquisition and platform expansion. This performance supports its strategic shift toward a capital-light, platform-led model that prioritises higher-margin revenue streams over inventory-intensive retailing.

The Kogan First loyalty program has become central to this strategy. Modelled on Amazon Prime, the program generated A$51.3 million in revenue in FY25, representing growth of 17.5year-on-year. Members demonstrate higher engagement, purchasing more frequently and with larger basket sizes than non-members. The introduction of the Kogan FIRST MAX tier late in FY25 further reflects efforts to segment and monetise high-value customers, using enhanced benefits to lift average revenue per user (ARPU).

Consumer Demographics

15%

Of Australian shoppers surveyed bought in the past 12 months

35-44 *years*

Over indexed as customers with 19% of this group buying from the platform in the last 12 months

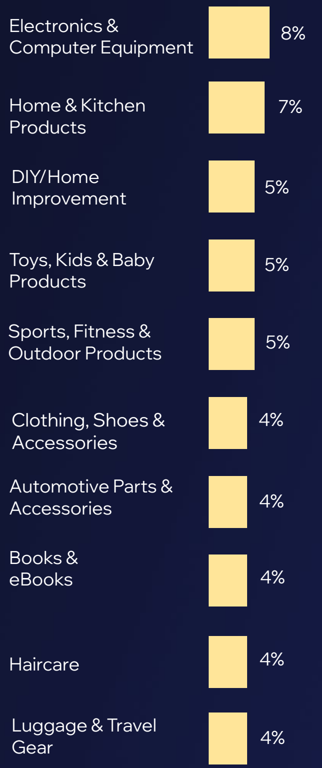
40%

Of males bought from Kogan vs 12% of females

$200k+

14% of households earning over $200k bought from Kogan

Top 10 categories in 2026



Which of the following product categories do you expect to purchase online in 2026, and where will you buy from?

Local and Category-Led Marketplaces in Australia

The Rise of Retailer-Led Marketplace Models

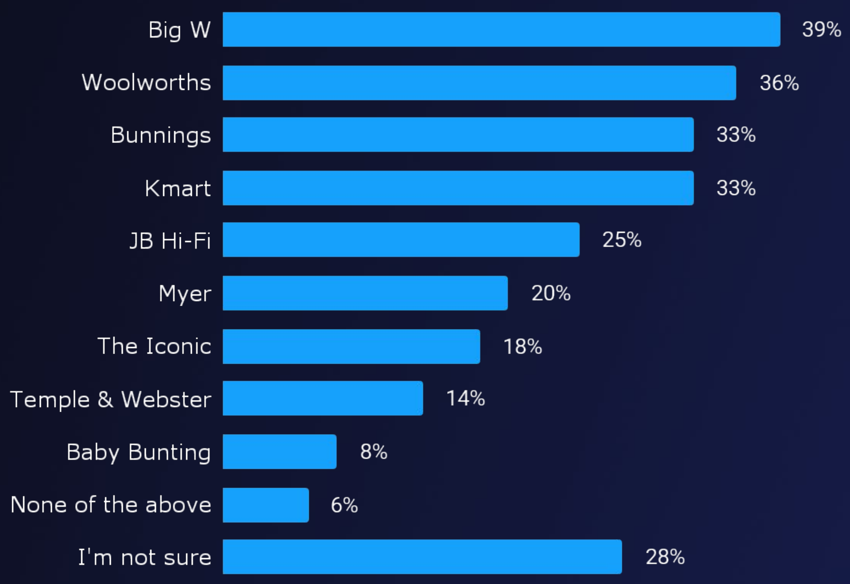
Understanding Consumer Awareness of Marketplace Models

As marketplace models expand across Australian retail, consumer awareness has not kept pace. Our research shows that almost one in three Australians (28%) are unsure which retailers operate marketplace models, highlighting how blurred the distinction has become between traditional retail and marketplaces.

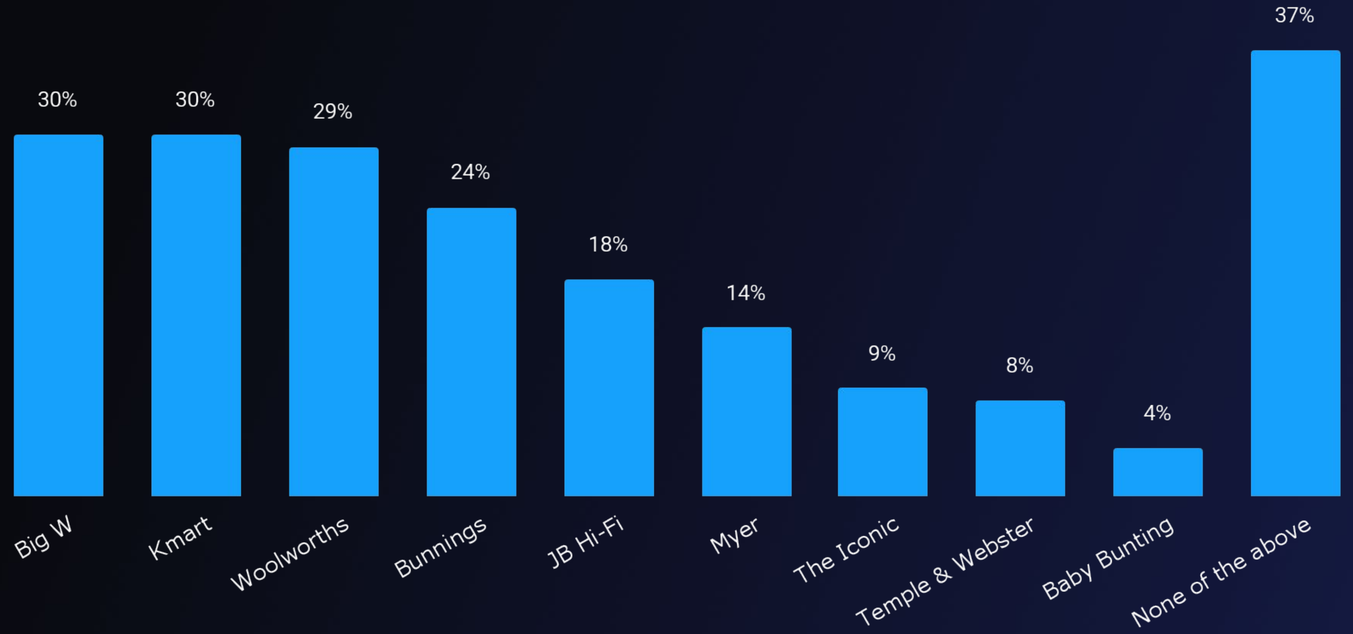
For many shoppers, the brand they trust matters more than how the transaction is structured. Whether a product is sold directly by the retailer or via a third-party seller is often unclear at the point of purchase and, in many cases, not a deciding factor. As a result, a growing number of local and category-led platforms function as marketplaces in practice, even if consumers do not consciously recognise them as such.

These platforms are increasingly important to watch, not because consumers actively seek out “marketplaces,” but because they are becoming embedded in everyday shopping behaviour across key retail categories.

Q. Some retailers operate as marketplaces. This means that other brands or sellers can list and sell their products directly through their website (similar to Amazon or eBay).Which of the following retailers do you believe operate this way?



Which, if any, of the following retailers have you purchased from via their online marketplace in the past 12 months?



How Consumers Discover Products Online

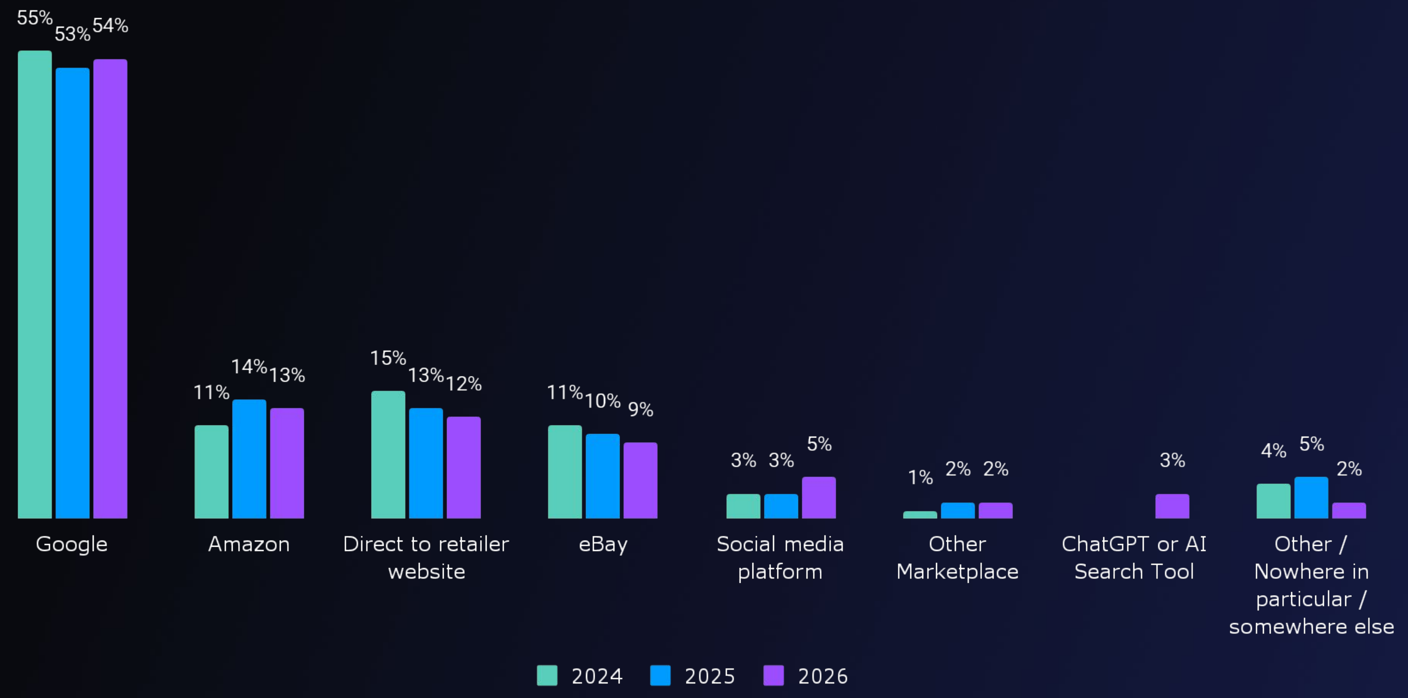
How consumers are discovering new products through Search, Social & AI

Search habits are shifting as social and AI gain momentum

Product discovery in Australia is becoming more distributed across channels, signalling a shift away from single-path search behaviour. Google remains the primary starting point for discovery, holding steady at just over half of all first searches. This stabilisation follows several years of gradual decline, with the past 12 months marking a modest rebound as Google adapts to changing consumer behaviours and integrates more AI-led discovery experiences.

In contrast, direct visits to retailer websites and eBay continue to trend downward, reflecting reduced reliance on brand-led and legacy marketplace entry points as shoppers increasingly explore a broader mix of marketplaces, social platforms and emerging search tools earlier in the purchase journey.

When looking for a particular product, where do usually you begin your search online?



Google Search in Australia Is Rising as AI and Mobile Use Shift Consumer Behaviour

In 2025 Australians are searching on Google more often and in more sophisticated ways, with Google holding around 93% of the search market in Australia.

Google's reversal of several years of product discoverability decline in 2025 is notable and appears closely tied to renewed consumer interest in ease of discovery and search efficiency following the introduction of AI-generated answers. According to Google, AI Overviews are driving more than 10% growth in search usage for queries where these summaries appear, suggesting users are searching more frequently when AI-assisted responses are available.

Google's AI Overviews appear in roughly 39% of searches, increasing what are known as "zero-click" results where users get answers without visiting another site.

Google sees over

5 Trillion

searches annually globally.

Google internal data

Queries are getting longer and more complex with

70%

of keywords now estimated to be long-tail and conversational

800%

YoY increase in "conversational" queries over 8 keywords

12B

visual searches a month using Lens (+65% YoY)

Insights provided by Google Australia, December 2025

67%

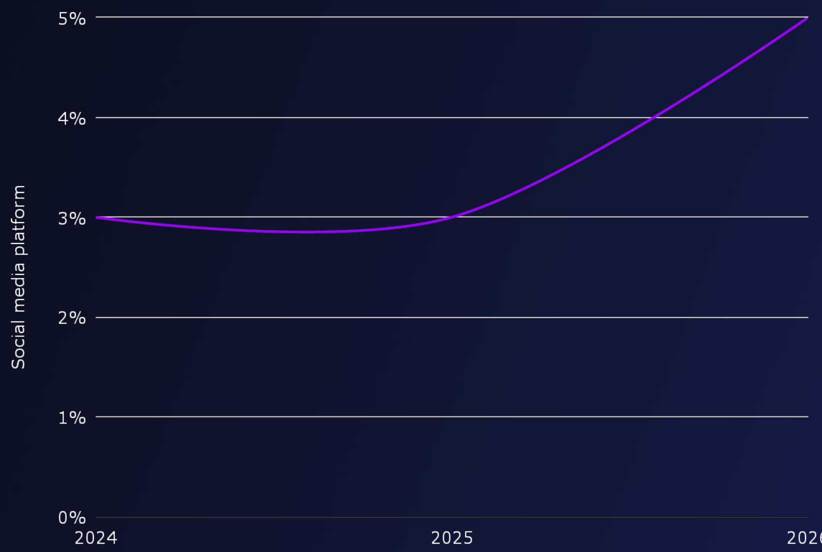
more consumers begin their product search on Social Media compared to our 2025 research

Social Media's Growing Role in Product Discovery

Social media is becoming a major starting point for shopping in Australia. With 78% of Australians active on social platforms and mobile use almost universal, more consumers are discovering products through feeds, creators and short-form video than ever before.

Social commerce is forecast to grow almost 20% in 2025, with rising investment in creator partnerships and influencer marketing, which is set to reach close to A$1 billion. More than half of Australians say they have shopped through a social platform, showing growing trust in buying directly from content.

TikTok's rapid growth, combined with the imminent launch of TikTok Shop in Australia, is set to accelerate this shift even further. Brands that focus on creator-led content and seamless in-platform shopping experiences will be well placed as social becomes a central part of the discovery journey.



2026 saw a 67% increase in the share of surveyed consumers choosing to begin their product research using social media.

32%

of consumers used AI as a part of their product discovery in 2025

32%

Admitted to using Search AI Overview, Chat GPT or similar AI assistant to research a product in the past 12 months.

45%

Of consumers surveyed have trust in AI generated recommendations when deciding what to buy.

44% do not trust AI and 11% are unsure.

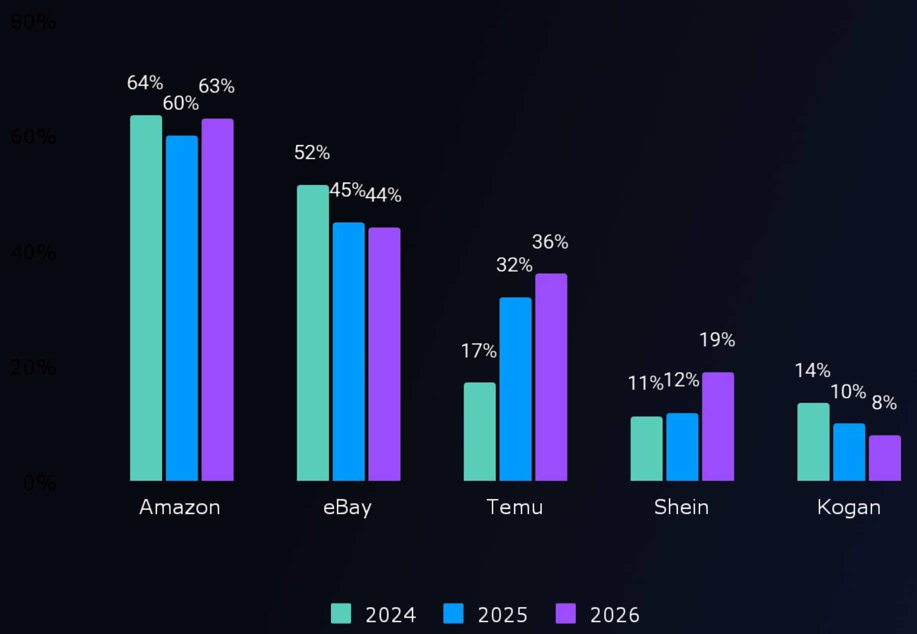
31%

31% of consumers surveyed said they rely more on AI when discovering products online compared to last year.

Marketplace Consumer Perceptions

How consumers research, evaluate and buy on marketplaces

Which marketplace(s) do you feel has the widest product range? [Select up to three]



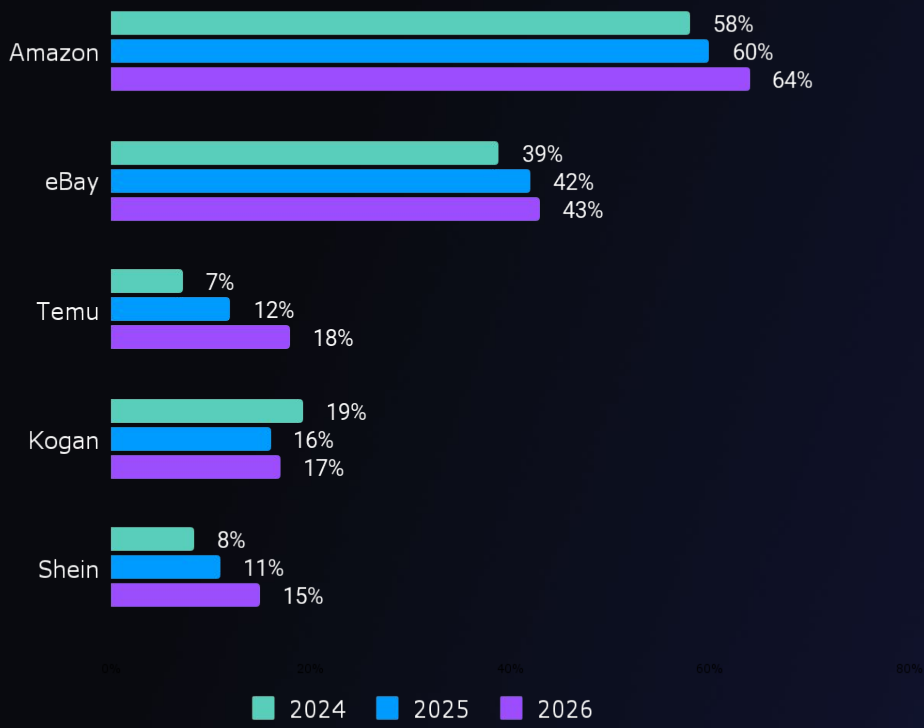
Amazon Still Leads on Product Range, but Shein and Temu Are Reshaping Perceptions

Consumer perceptions of product range continue to favour Amazon, with 63% of shoppers identifying it as the marketplace offering the widest assortment.

While Amazon's lead remains intact, the most significant shift is the rapid rise of Shein and Temu. Shein's expansion beyond fashion into home, beauty and lifestyle categories has materially broadened perceptions of its range, lifting association from 11% to 19% over the past two years.

Temu has recorded an even sharper increase, driven by aggressive category expansion and a discovery-led, deal-heavy shopping experience. By contrast, eBay's long-standing reputation for breadth continues to weaken. Overall, perceptions of assortment are increasingly gravitating toward fast-growing, value-focused marketplaces, even as Amazon retains its leadership position.

Which marketplace(s) do you trust the most with regards to the quality of products sold? [Select up to three]



Improving Quality Perceptions Drive Shifts in Marketplace Trust

Trust in product quality continues to be led by Amazon, rising to 64% as shoppers respond to its consistent delivery experience, brand protection programs and growing base of verified sellers.

eBay remains a distant second, with limited year-on-year movement, reflecting ongoing concerns around inconsistent seller quality.

While Amazon's leadership remains intact, the gap is gradually narrowing as newer marketplaces work to reassure shoppers and elevate perceived product standards.

+50%

Temu increase in product quality perception.

+36%

Shein increase in product quality perception.

Trust in Temu and Shein Is Rising

Shopper perceptions of product quality and trust have improved markedly for both Temu and Shein over the past year. Temu has recorded a 50% uplift in quality and trust perception, while Shein has increased by 36%, signalling a meaningful shift from earlier scepticism.

While both platforms were previously criticised for inconsistent quality, targeted investment in range expansion, supplier standards and brand partnerships is beginning to change sentiment. Shein, in particular, is broadening beyond fast fashion into categories such as home, electronics and beauty, while actively partnering with established global brands to strengthen credibility.

Rising trust levels position both platforms to compete on more than price, supporting longer-term relevance in the Australian marketplace landscape.

33%

Of shoppers say ease of use and speed of delivery are the primary reasons they buy from a marketplace.

Convenience and Experience Are Now Core Marketplace Differentiators

Convenience has become the defining factor for how Australians choose where to shop online, with one in three consumers saying ease of use and delivery speed are the main reasons they turn to marketplaces. Research from Manhattan Associates found that 44% of Australians would choose Amazon over Temu even if the same product cost more, simply because Amazon could deliver it faster, underscoring the growing importance of fulfilment performance in purchase decisions. This behaviour reflects a broader shift in expectations, where fast, reliable delivery is no longer a bonus but a baseline expectation for many shoppers.

Post-purchase experience is also increasingly part of the convenience equation. Manhattan Associates' study highlights that two-thirds of shoppers say an easy returns process is critical to their overall experience, yet more than a third have encountered issues with refunds or product returns in the past year. These friction points compound when delivery speed is poor or returns are difficult, amplifying dissatisfaction and reducing likelihood of repeat purchase.

Australia's Leading Marketplace

The marketplace Australians use most, trust most and revisit most often

Amazon Strengthens Its Position as Australia's Leading Marketplace

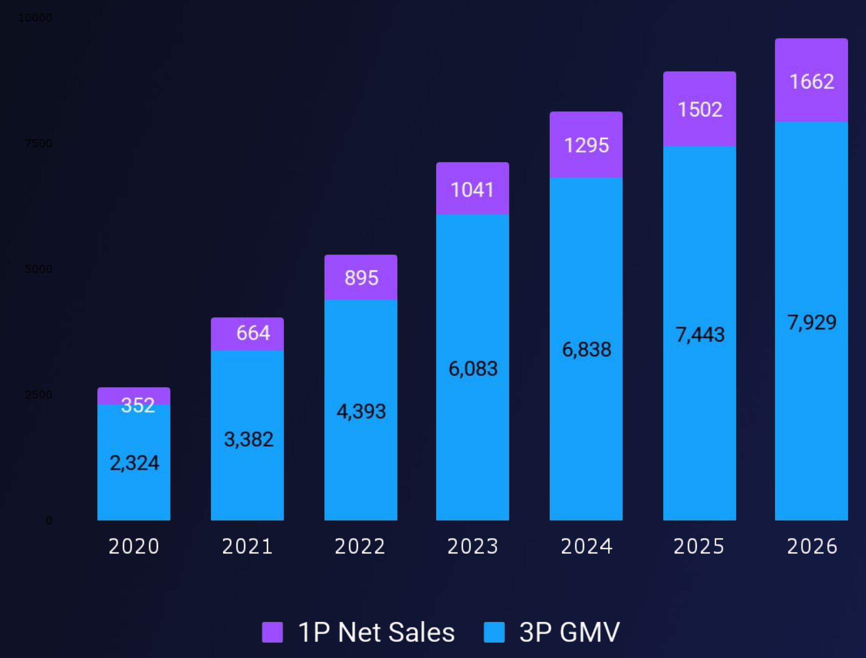
Amazon continues to perform strongly both globally and in Australia, reinforcing its position as a foundational marketplace within the local ecommerce landscape. In its Q2 2025 results, the company reported solid sales growth, driven by expanding third-party marketplace activity and ongoing investment in fulfilment and delivery infrastructure. Subsequent Q3 reporting points to a sharp lift in profitability, supported by the combined momentum of cloud services and marketplace operations.

Continued investment in logistics, seller enablement and assortment breadth strengthens Amazon's core value proposition for Australian consumers: reliable delivery, wide product choice and competitive pricing. For brands, this performance highlights that a credible, well-managed presence on Amazon Australia has become increasingly critical to capturing sustained online demand.

Third-Party Sellers Drive Amazon's Retail Growth

Amazon's marketplace model continues to strengthen, with third-party (3P) sellers now accounting for the majority of total retail volume. Global 3P gross merchandise value has expanded sharply, rising from approximately US$130 million in 2017 to an estimated ~ US$8 billion by 2026. This growth reflects accelerating seller participation, the maturation of marketplace tools and rising consumer confidence in third-party offerings.

First-party (1P) retail has also grown, estimated to reach US$1.66 billion in 2026, but at a markedly slower rate. As a result, 3P now represents more than 80% of Amazon's total retail sales mix. This structural shift highlights Amazon's strategic focus on scaling its marketplace ecosystem, where sellers drive assortment, availability and price competition, while Amazon increasingly monetises the platform through fulfilment, advertising and infrastructure.



Source: ECDB Total USD GMV in Billions , 1P VAT Excluded amazon.com.au

Understanding Amazon 1P vs 3P Selling Models

Amazon offers two primary routes to market for brands: First Party (1P) and Third Party (3P). The model a brand chooses has a direct impact on pricing control, margins, operational complexity and the nature of its relationship with Amazon.

At a high level, 1P operates as a wholesale arrangement, with Amazon purchasing and reselling products, while 3P is a marketplace model where brands sell directly to consumers using Amazon's platform and services.

As the world's largest Amazon 3P seller, Pattern supports brands across both models and, where appropriate, helps deploy a hybrid approach to balance scale, control and long-term profitability.

	1P	3P
	Invitation Only	**Open to Anyone**
	Brands can only participate as 1P inventory sellers by invitation from Amazon.	**3P selling on Amazon is open to all eligible sellers.**
Selling	Brand sells inventory directly to Amazon, who then resells to customers	Sell to a 3P seller or directly to Amazon customers
Pricing	Amazon Controls Retail Pricing	Seller Controls Retail Pricing
Marketing	Sponsored Brands, Sponsored Display, Sponsored Products, DSP	Sponsored Brands, Sponsored Display, Sponsored Product, DSP
Operations	Sold by Amazon, fulfilled by Amazon	Sold by the seller, fulfilled via FBA or merchant-fulfilled

When you purchased from Amazon.com.au in the past 12 months did you do any of the following? Please select all that apply

48%

Of online shoppers surveyed visited a brand's own website after discovering the product on Amazon.

This is a significant 18% increase vs our previous report.

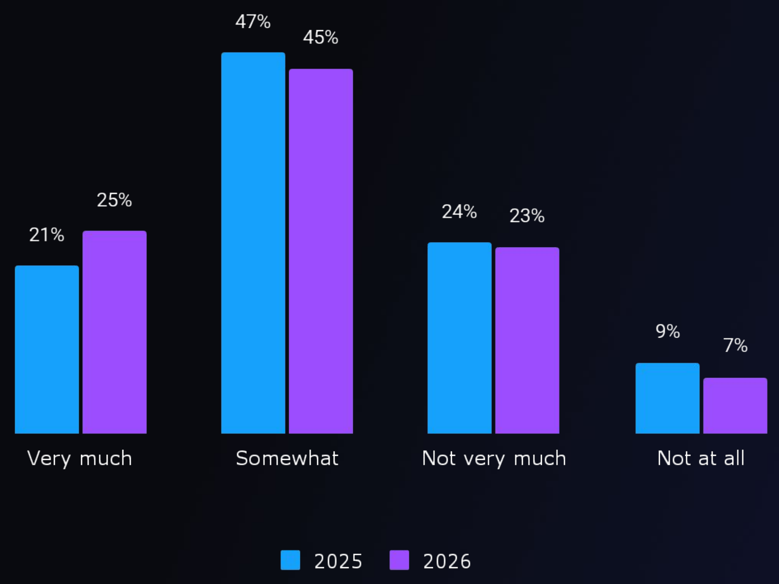
Amazon Is Emerging as a Gateway to Brand Discovery

Consumers are increasingly using Amazon as a starting point for product and brand discovery. Nearly half of shoppers (48%) report visiting a brand's own website after first encountering it on Amazon, marking a meaningful increase from previous years.

This shift highlights Amazon's growing influence beyond conversion and into upper-funnel behaviour. As shoppers browse categories, compare options and rely on reviews, many then move off-platform to explore brand ranges, validate authenticity or seek additional information.

The declining share of consumers who say Amazon plays no role in discovery reinforces its evolution from a transactional marketplace into a key discovery channel that actively drives traffic to brand-owned sites.

When considering making a purchase on Amazon.com.au, how much does the seller name impact your decision to buy?

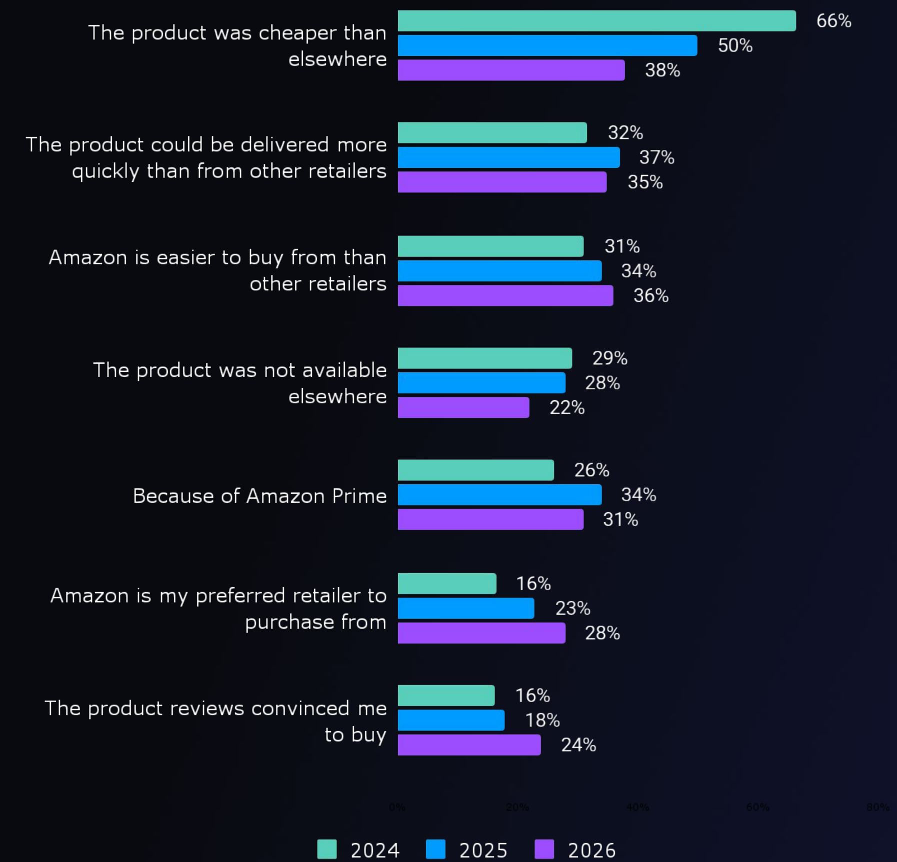


Seller Trust Drives Purchase Decisions

Trust in the seller behind the listing is becoming a more decisive factor for Amazon shoppers. In our latest research, 25% say the seller name strongly influences their purchase decision, up from 21% the year prior, while the share who say it has no impact has fallen to just 7%.

This shift reflects growing shopper awareness of third-party sellers and increasing reliance on trust signals such as reviews, badges and branded storefronts. As a result, clear seller identity and reputation are playing a larger role in driving conversion.

When you purchased from Amazon.com.au in the past 12 months, why did you purchase from here instead of another retailer?



Amazon's Advantage Shifts from Price to Convenience, Experience, and Trust

Reasons for choosing Amazon are changing as shopper expectations evolve. In 2026, price is no longer the only dominant driver, dropping to 38%, down from 66% in our 2024 research.

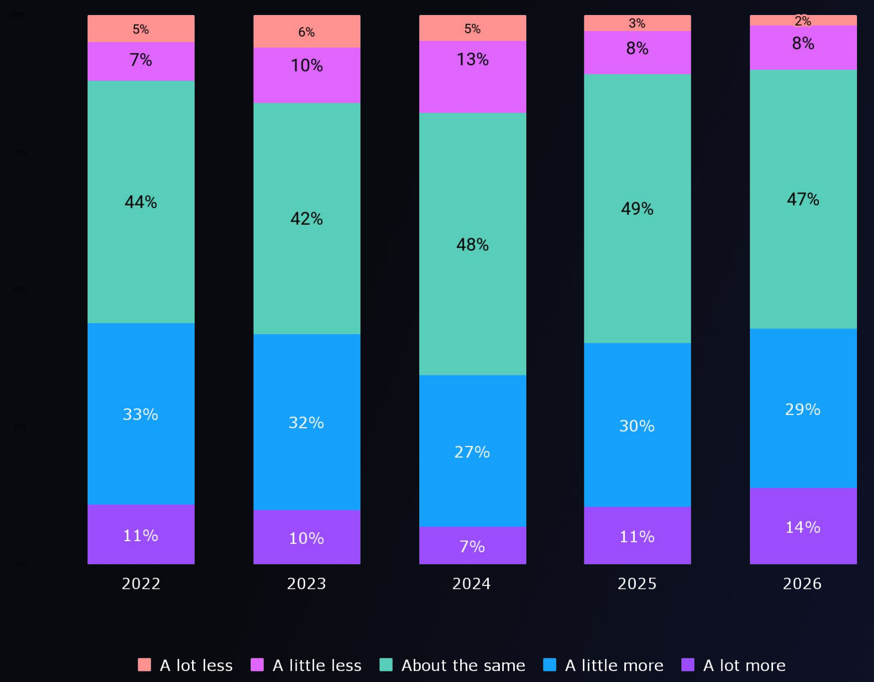
Instead, consumers are buying from Amazon because it is easier (36%), faster (35%), and supported by Prime benefits (31%). Preference for Amazon as a retailer has also grown to 28%, signalling stronger loyalty and habitual use.

Product reviews are playing a bigger role, rising to 24% as shoppers rely more on community validation. Overall, Amazon's edge is shifting from pure cost competitiveness to a smoother, more trusted purchasing experience.

40%

Made a purchase during a Prime event in 2025

How much do you expect to spend on Amazon.com.au in 2026 compared to 2025?

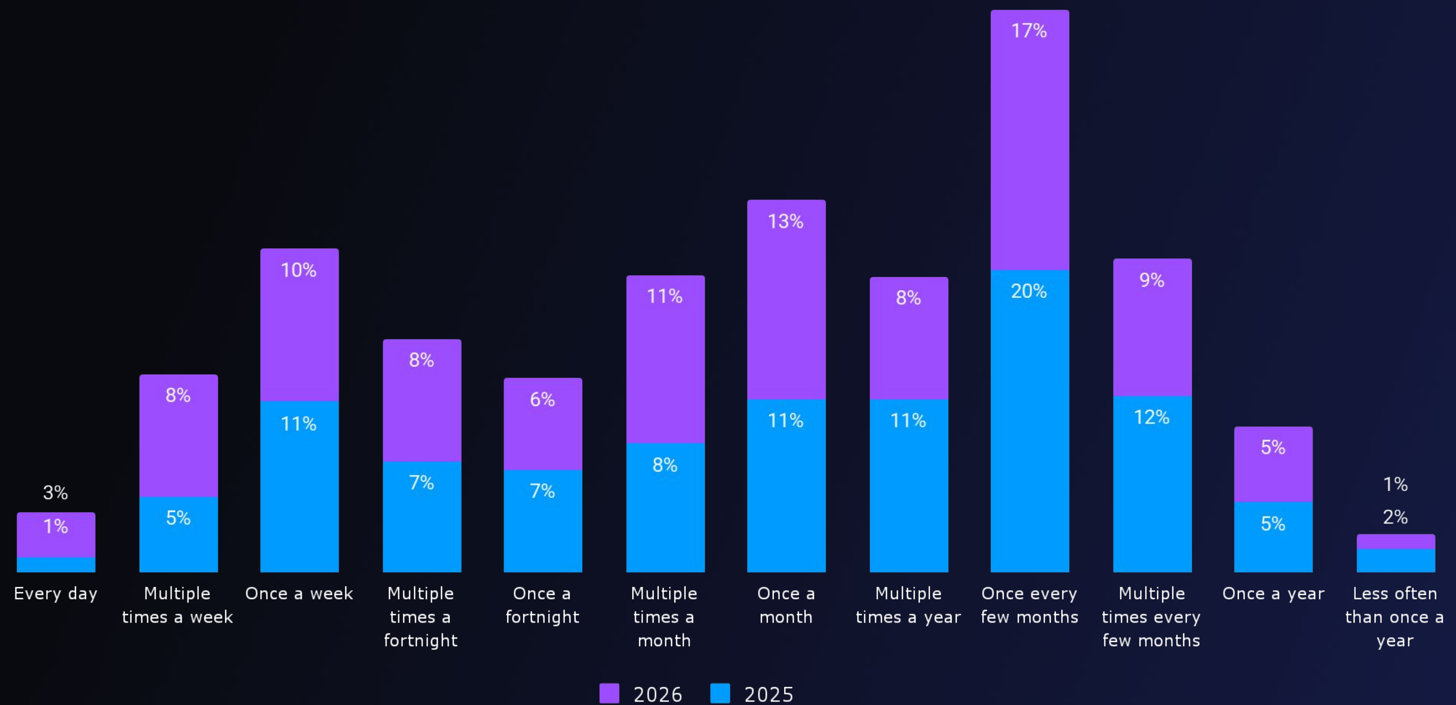


Amazon Captures a Larger Share of Shoppers' Wallets

Consumers are expecting to direct more of their online spending toward Amazon in the year ahead. Fourteen percent plan to spend a lot more than last year - the highest number over the past five years - and a further 29% expect to spend a little more.

Only 10% anticipate spending less. This reduction on last year suggests Amazon is continuing to strengthen its position in consumers' overall online shopping budgets, supported by its broad assortment, consistent value perception, and trusted delivery experience.

In the past 12 months, on average how often did you make a purchase on Amazon.com.au?

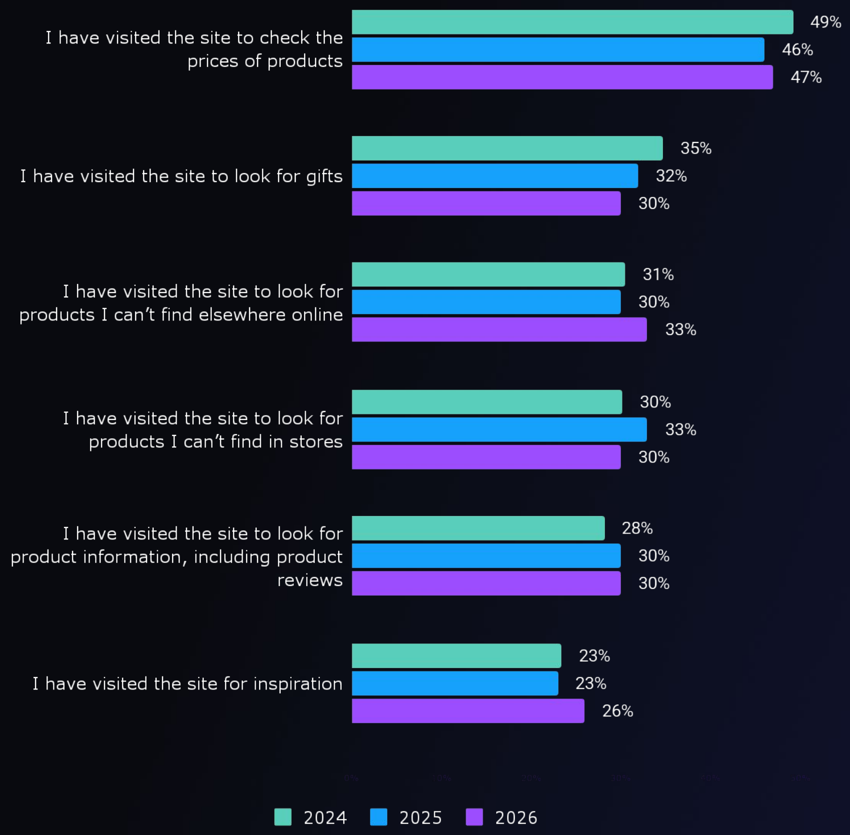


Amazon Usage is Shifting From Occasional to Routine

Amazon is becoming a more frequent shopping destination for many Australians. In 2026, more consumers report buying multiple times a week (8%, up from 5%) and multiple times a month (11%, up from 8%). Daily purchasing has also risen to 3%.

At the same time, infrequent purchasing is declining, with fewer shoppers buying only a few times a year or once every few months.

Have you visited Amazon.com.au and done any of the following in the past 12 months?



Marketplaces Are Playing a Bigger Role in Inspiration and Discovery

While price checking remains a core driver of marketplace visits, the strongest year-on-year growth is coming from inspiration-led browsing.

In our 2026 research, more consumers report visiting marketplaces for ideas and inspiration, signalling a shift toward more exploratory shopping behaviour. This is being reinforced by an increase in visits to find products that cannot be sourced elsewhere online, highlighting the growing role of marketplaces as discovery destinations rather than purely transactional platforms.

If you went onto Amazon.com.au to look for a product from a specific brand and you could not find it, which of the following would you be most likely to do?

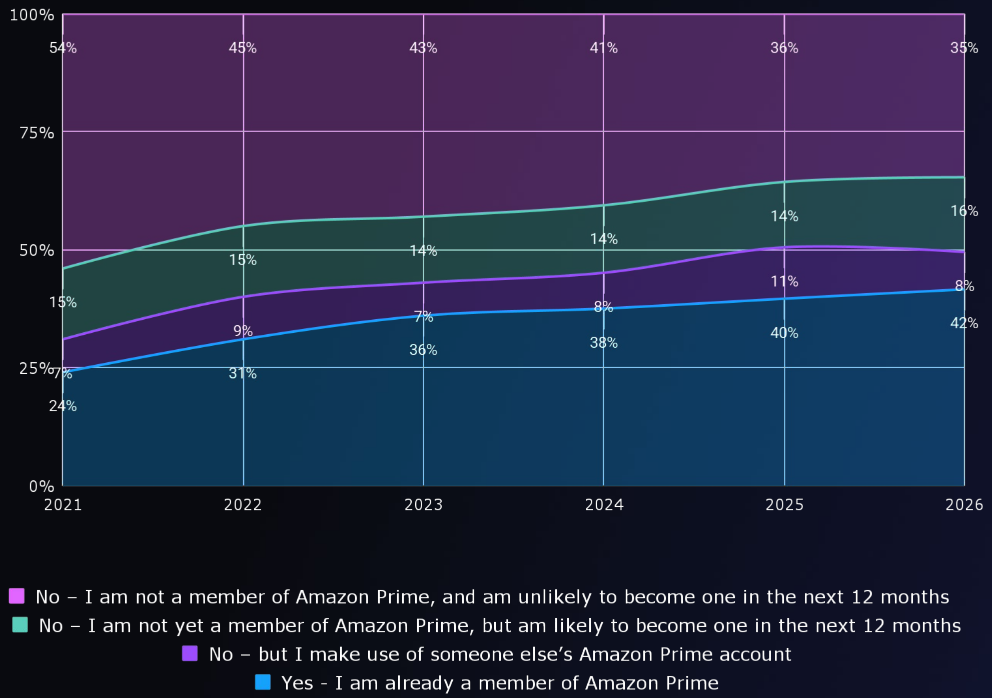
When Preferred Brands Are Missing, Amazon Shoppers Pivot Rather Than Search

If consumers cannot locate a preferred brand on Amazon, they are increasingly unlikely to continue searching elsewhere online. Instead, a growing proportion opt to purchase a comparable product from a brand they do not yet know, rising to 14% in 2026.

This change underscores Amazon's role as a powerful brand discovery environment where high-intent shoppers are willing to substitute quickly when availability gaps occur.

Absence on Amazon does not pause demand. It redirects it, often toward unfamiliar competitors that are simply present at the point of need.

Amazon Prime is a subscription service that provides Amazon.com.au shoppers with unlimited free delivery on eligible items and access to online entertainment content. It costs AU$ 9.99 a month. Are you a member of Amazon Prime?



Prime Access Reaches Two-Thirds of Australians as Adoption Accelerates

Prime penetration continues its strong upward trajectory, with 42% of Australians now members and a further 8% accessing Prime through someone else's account.

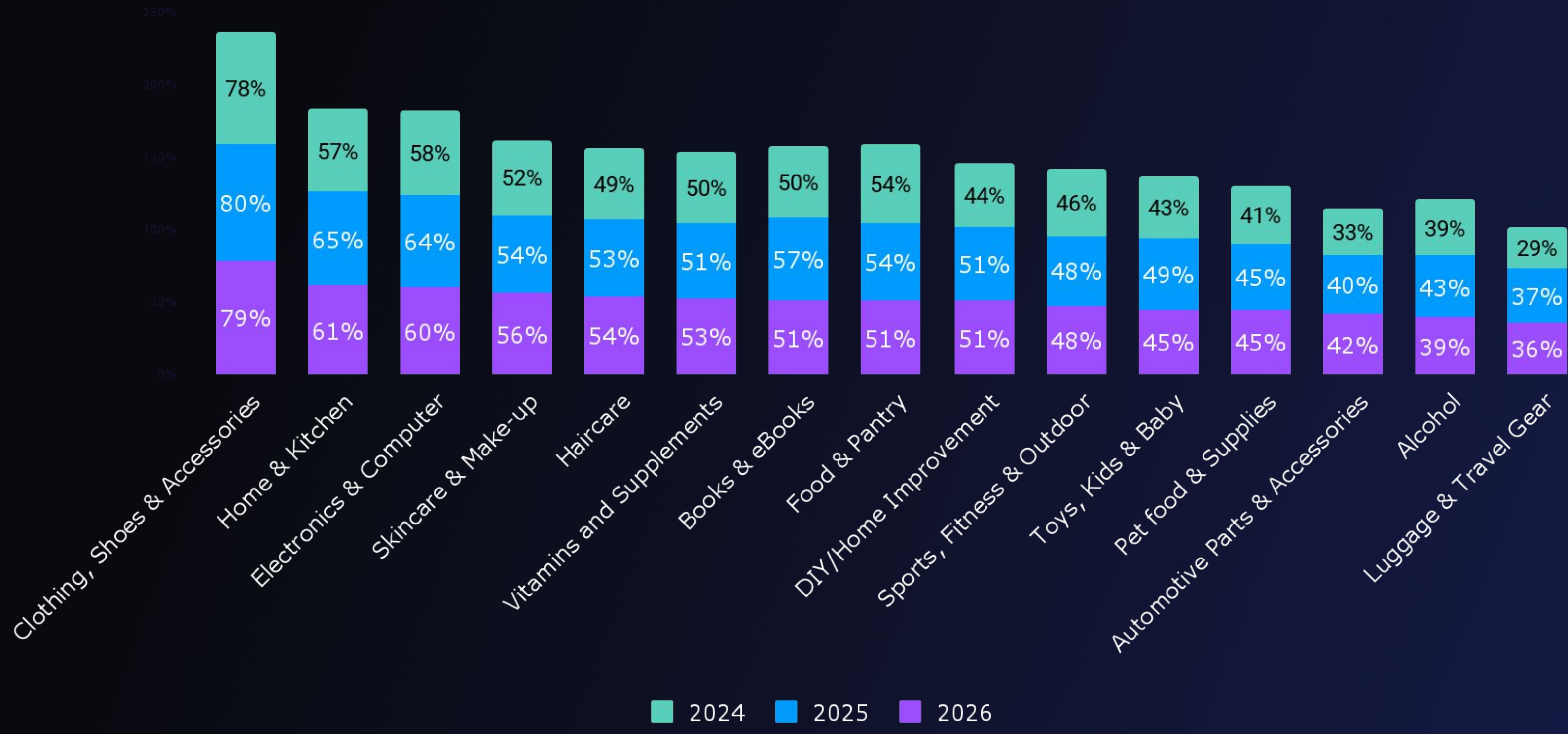
When combined with those planning to join in the next 12 months, total access reaches 66% of surveyed consumers, up from 65% last year and just 46% in 2021. This steady climb demonstrates Prime's growing role in shaping online shopping expectations, from delivery speed to bundled benefits.

The portion of consumers unlikely to join continues to decline, highlighting Amazon's strengthening position in the subscription economy and the increasing normalisation of Prime as part of the Australian retail landscape.

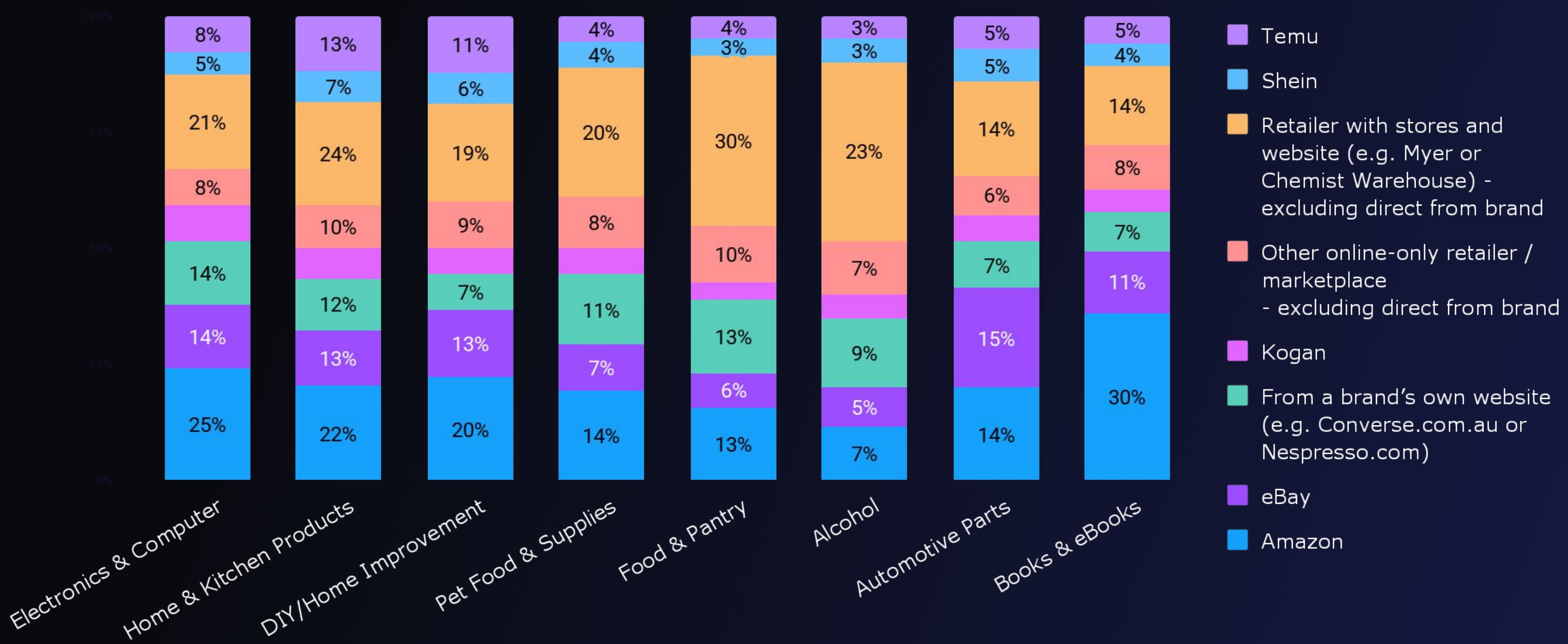
Categories and Channels Driving Online Growth

Tracking category demand and channel choice across past behaviour and future intent

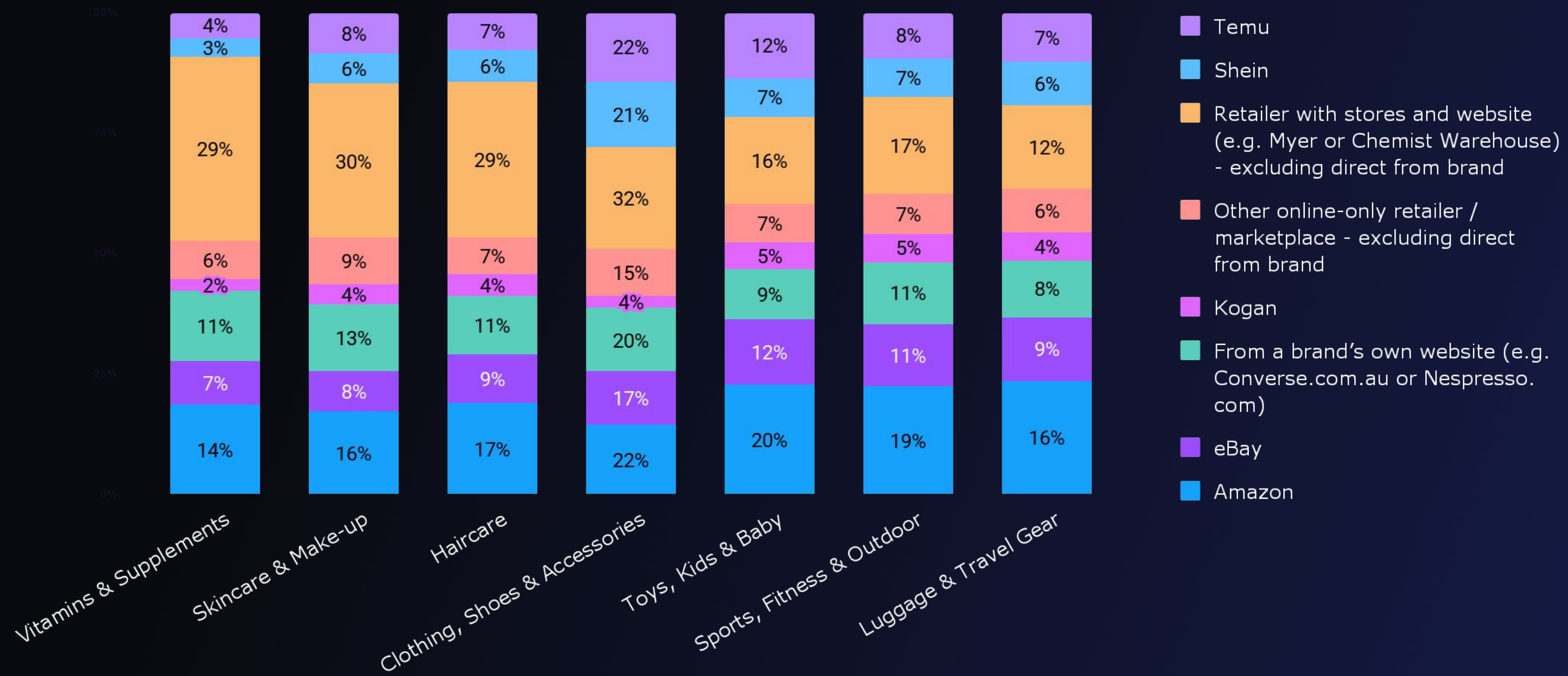
Which of the following product categories have you purchased online in the last 12 months?



Which of the following product categories do you expect to purchase online in 2026 , and where will you buy from?



Which of the following product categories do you expect to purchase online in 2026 , and where will you buy from?



78%
Intend to purchase online in 2026

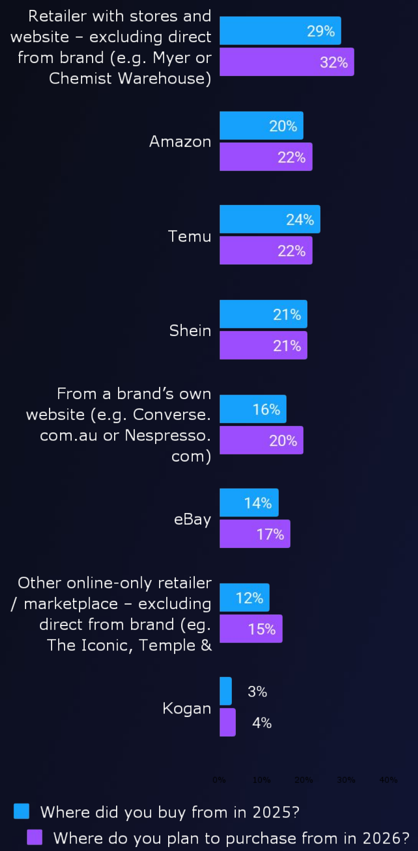
Clothing, Shoes & Accessories

One of the largest and most mature ecommerce segments, reaching approximately A$15.23 billion in online revenue in 2025. With ~30% of total fashion spend now occurring online, competition is intense and increasingly driven by trust, price, speed, and marketplace visibility.

KEY CATEGORY FACTS

- Ecommerce revenue projected to grow to A$19.7 billion by 2029
- Online penetration expected to increase to 34% by the end of 2029
- Marketplaces and retailers capture over 60% of intended category purchases

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

60%

Intend to purchase online in 2026

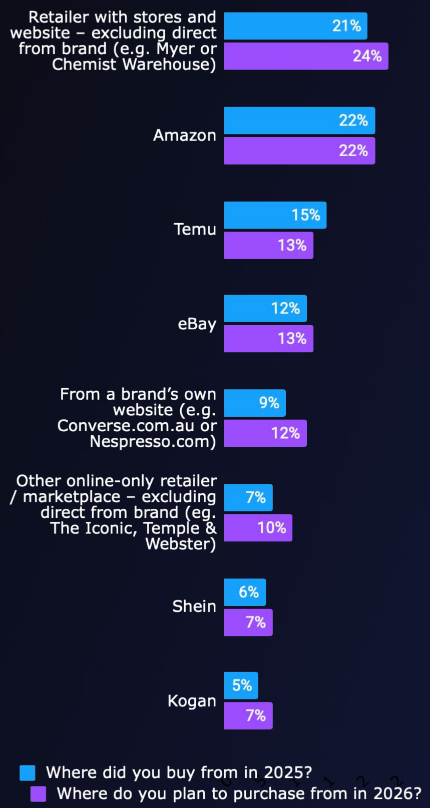
Home & Kitchen Products

The Australian Home and Kitchen market in 2025 has crystallised into a landscape defined by technological integration. The market for high-utility, energy-saving, and automated appliances is experiencing significant growth. Consumers are actively trading down on trend-based decor via Temu and Shein, while trading up on durable investments.

KEY CATEGORY FACTS

- The Australian kitchen appliances market alone was valued at A$5.36 billion in 2025
- Brand-owned websites show the strongest forward growth (+33%), in purchase intent
- Amazon maintains a consistent 22% share in both our 2025 and 2026 research, positioning it as a core online destination.

Source: ECDB

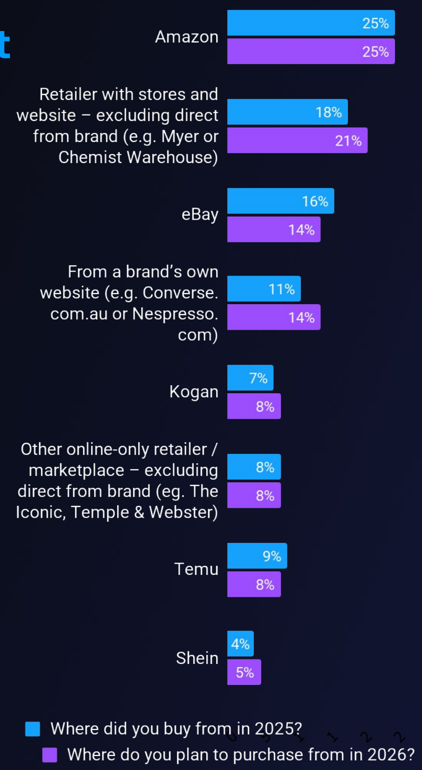


Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

59%

Intend to purchase online in 2026

Electronics & Computer Equipment



Online electronics remains a high-penetration, fast-evolving category. In 2025, 60% of consumers purchased electronics online according to our research, led by Amazon's scale and share. Growth is broadening in 2026 as brand-direct and omnichannel retailers gain traction, while consumer electronics continues to dominate category spend (71% share vs 29% share for electrical appliances).

KEY CATEGORY FACTS

- Ecommerce accounts for 40% of the total electronics market in 2024, forecast to reach 45% by 2030
- Category revenue set to grow to A$25.6 billion by 2030
- Amazon leads the Australian electronics market by a significant margin, generating A$4.24 billion in GMV

Source: ECDB

Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

57%

Intend to purchase online in 2026

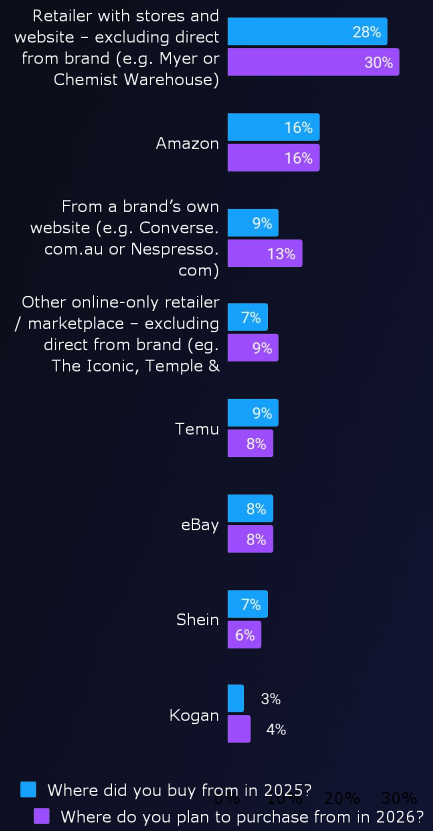
Skincare & Make-up

Online beauty, led by skincare and makeup, continues to scale steadily in Australia. Makeup online sales are projected to reach A$29.9 million in 2026, growing to A$34.4 million by 2029. Penetration is rising as consumers increasingly favour brand-direct channels for trust, education, and product authenticity.

KEY CATEGORY FACTS

- 44% projected growth of consumers buying direct from a brand's website
- 29% of make-up sales are projected to be online in 2026
- While not the leading channel, Amazon remains a key player, holding steady at 16% share of online skincare and makeup purchases

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

57%

Intend to purchase online in 2026

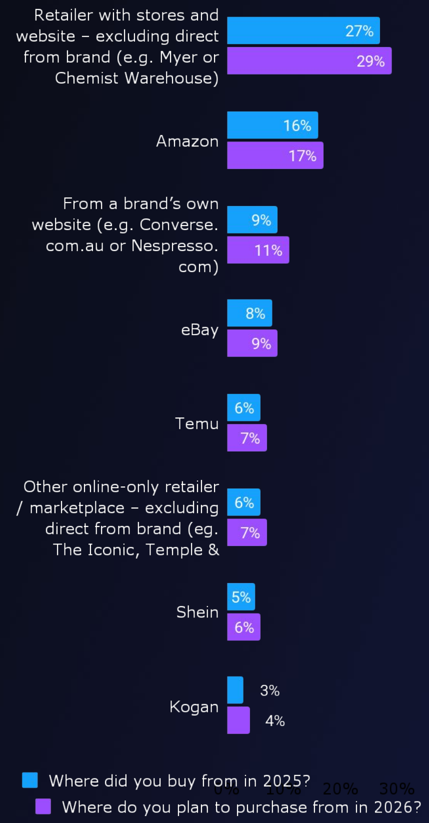
Haircare

In 2025, the Australian haircare market has transcended its traditional boundaries of hygiene and grooming to become a sophisticated "health-first" category. The market is characterised by a mature omnichannel ecosystem where digital discovery drives physical purchasing, prioritising affordable luxury and restorative treatments that promise longevity and wellness.

KEY CATEGORY FACTS

- Australian haircare market was valued at A$2 billion in 2025
- Dominance of omnichannel retailers with 29% planning to shop from these platforms in 2026
- Online marketplaces continue to strengthen in purchase intent, with Amazon growing by 6% YoY

Source: imarc



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

53%
Intend to purchase online in 2026

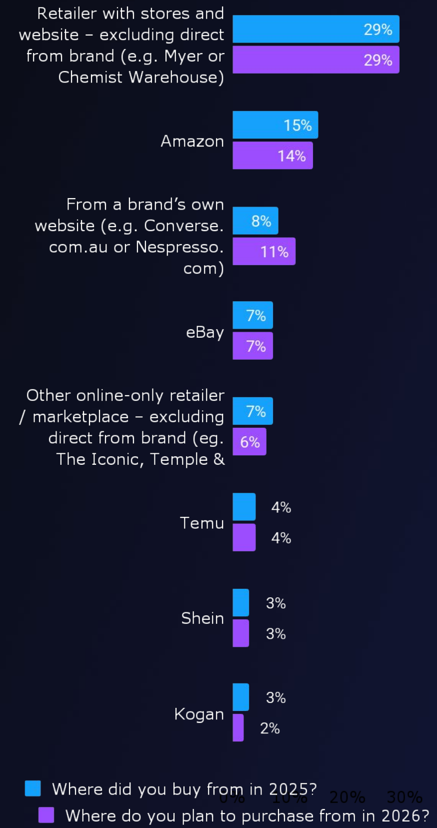
Vitamins & Supplements

This is a fundamentally retention-led category, where long-term winners are those investing in credibility, consistent availability and robust loyalty infrastructure, rather than relying on short-term, price-led acquisition. No longer discretionary, vitamins and supplements have become a household staple in Australia, driven by a post-pandemic shift toward preventative health and everyday wellness behaviours.

KEY CATEGORY FACTS

- 29% will continue to buy from retailers like Chemist Warehouse reinforcing category trust
- Amazon captures 15% of purchase intent, as a convenience-led secondary channel
- Category reached a valuation of A$289 million in 2025

Source: ECDB



53%

Intend to purchase online in 2026

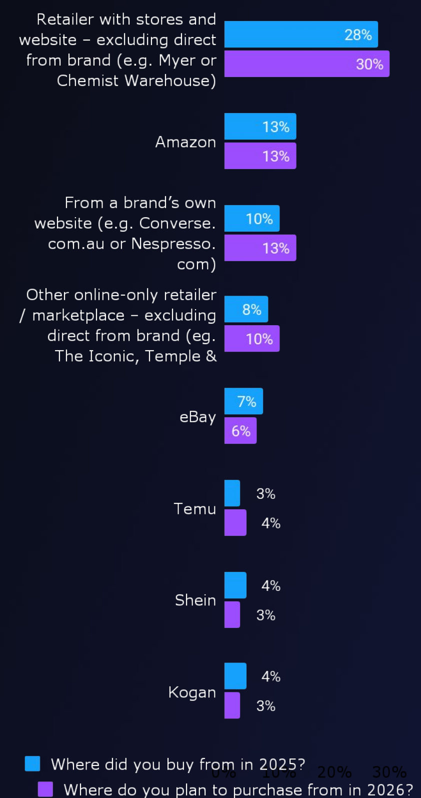
Food & Pantry

The food and pantry ecommerce category is one of the largest and fastest-scaling online retail segments, reaching approximately A$9.11 billion in online revenue in 2025, up ~13.4% YoY. Growth has normalised from pandemic peaks but remains structurally strong, driven by convenience, replenishment behaviour, and retailer-led digital adoption.

KEY CATEGORY FACTS

- Retailers lead purchase behaviour, accounting for 30% of intended purchases in 2026
- Amazon captures 13% of purchase intent, maintaining stable demand YoY
- Online share projected to reach 7.5% by 2030

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

52%

Intend to purchase online in 2026

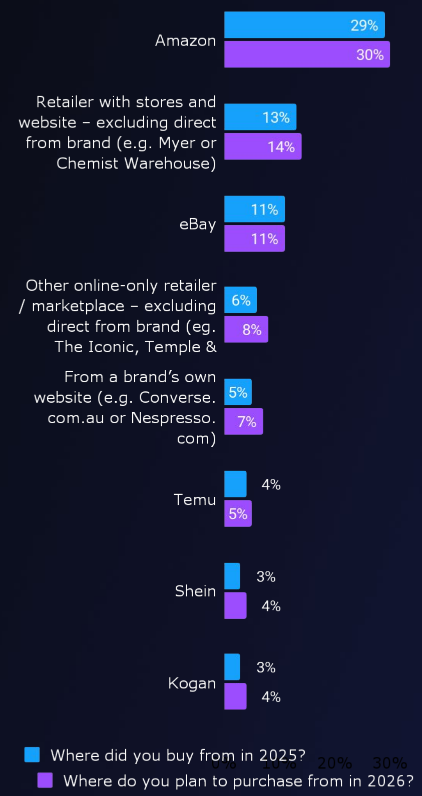
Books & eBooks

The books and ebooks category is a large but mature digital market, generating approximately A$1.9 billion in online revenue in 2025. After strong pandemic-driven growth, the category has stabilised into low single-digit growth, with demand remaining resilient but incremental.

KEY CATEGORY FACTS

- Online penetration expected to reach 23% by 2030
- Marketplaces account for over 50% of total book purchase intent combined
- Amazon is the clear primary purchase channel, leading all retailers by a wide margin

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

51%
Intend to purchase online in 2026

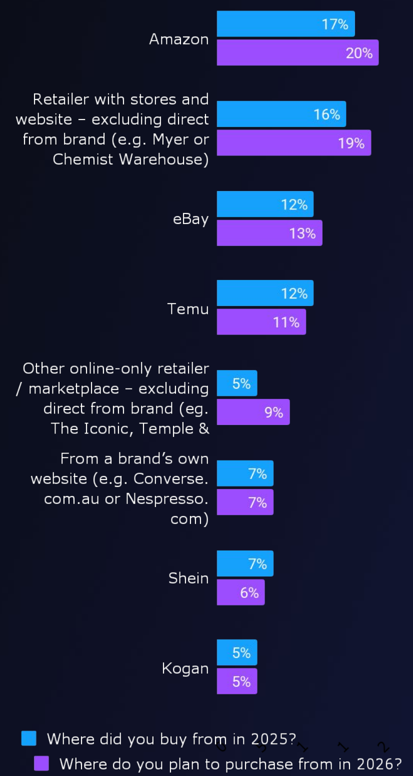
DIY/ Home Improvement

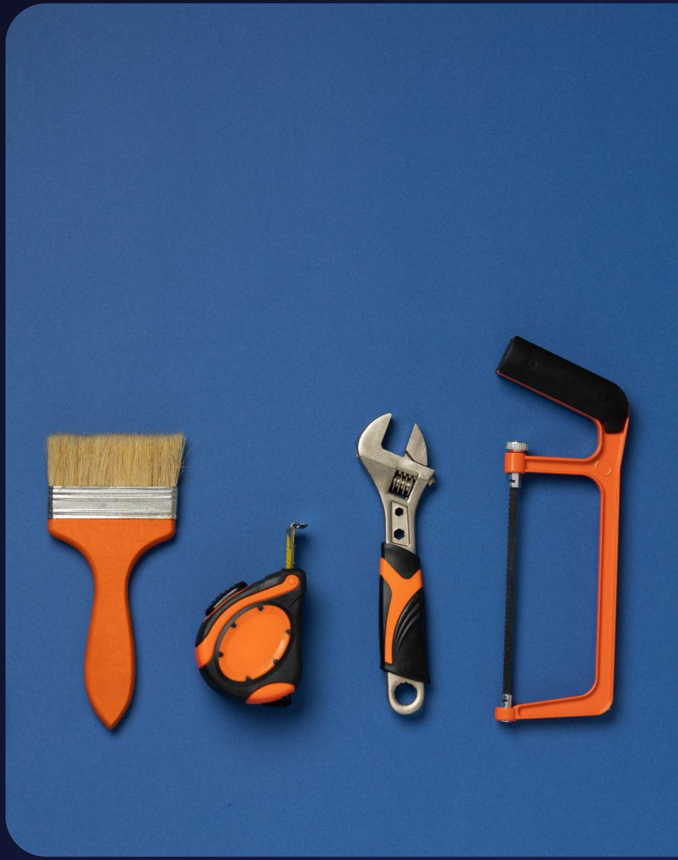
The DIY ecommerce market is on a strong upward trajectory, having benefited from post-pandemic lifestyle shifts, a rising preference for self-managed renovation, and robust seasonal demand - particularly in Q4 and summer months. Major players like Amazon and Bunnings dominate the landscape, with Amazon leading online GMV. The market's resilience and steady rise signal that ecommerce will remain a central pillar of Australia's DIY economy through the decade.

KEY CATEGORY FACTS

- Amazon leads the DIY ecommerce race, generating the highest online revenue
- Online market revenue is on track to grow from A$3.37 billion in 2025 to nearly A$5.7 billion by 2030
- Online share climbing past ~15% in 2025 and projected to hit 16–17.5% by 2030

Source: ECDB





Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

47%

Intend to purchase online in 2026

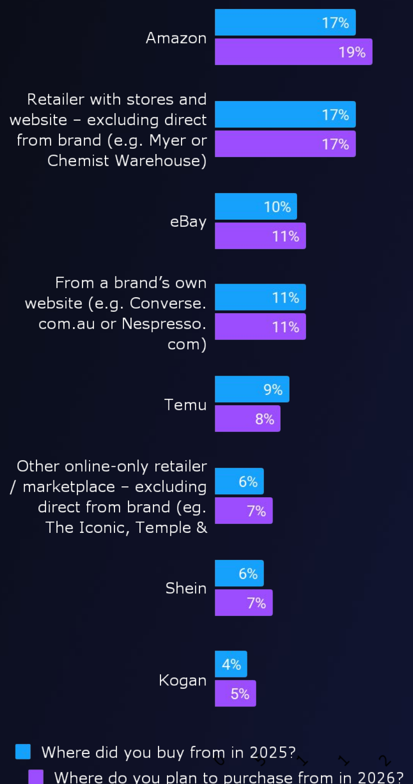
Sports, Fitness & Outdoors

Ecommerce accounts for a substantial share of all sports, fitness and outdoor product sales in Australia and will increasingly be the engine of growth for sporting goods retail, as companies innovate to meet consumers where they prefer to shop which, more and more, is on digital platforms.

KEY CATEGORY FACTS

- ~25% of all category sales occur online, with penetration expected to rise toward 30% by 2030
- Amazon has quickly become a top destination for sports and outdoor items, being the second-largest online seller in this category
- Marketplace platforms and brand-direct channels capture the majority of online sales

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

44%
Intend to purchase online in 2026

Toys, Kids & Baby Products

The Toys, Kids and Baby Products category remains a stable and a defensively strong ecommerce segment in 2025, characterised by steady low-single-digit growth, high seasonality, and a continued shift online, with ecommerce now accounting for ~20% of total toy sales. Amazon continues to dominate online GMV, reinforcing the category's reliance on marketplace-led discovery and fulfilment.

KEY CATEGORY FACTS

- Annual Revenue of the Australian Toys Market expected to grow to A$1.8 million by 2029
- Amazon is the largest seller of the category (based on annual GMV)
- Online ecommerce share of the total toys market projected to grow to 24% by 2029

Source: ECDB

Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

45%

Intend to purchase online in 2026

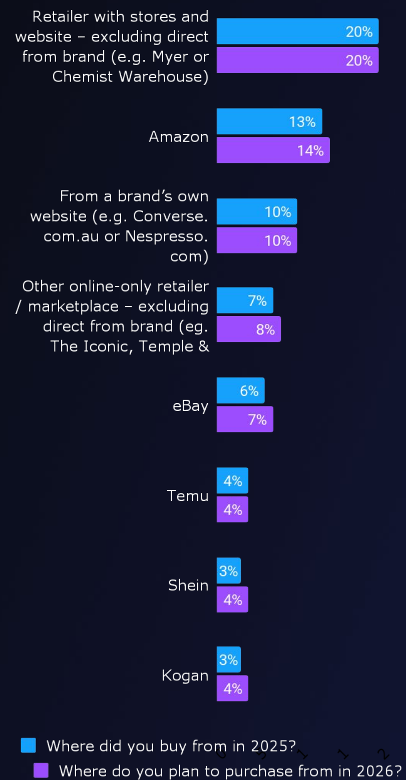
Pet Food & Supplies

The pet food and supplies category remains a high-growth, structurally resilient segment, reaching approximately A$709 million in online revenue in 2025. After a brief post-pandemic slowdown, growth has re-accelerated, supported by strong pet ownership fundamentals and repeat purchasing behaviour.

KEY CATEGORY FACTS

- Online penetration is at 21% positioning pet supplies as one of the most digitally mature essential categories
- Amazon captures 13-14% of pet purchase intent, second only to major retailers
- Category forecast to nearly double online revenue, reaching A$1.42 billion by 2030

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

41%

Intend to purchase online in 2026

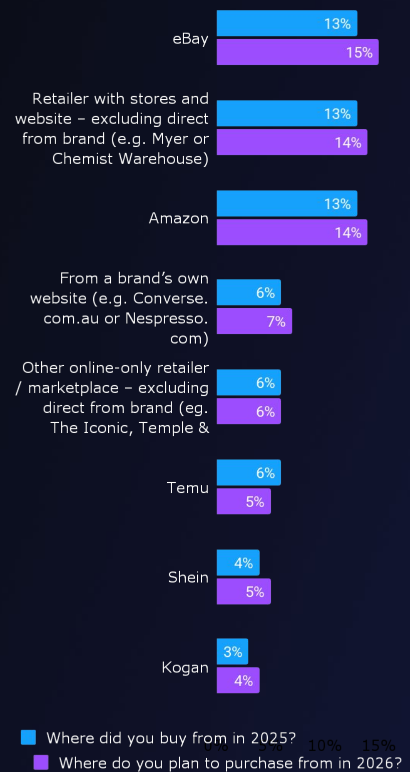
Automotive Parts & Accessories

The automotive parts and accessories ecommerce market generated approximately A$1.6 billion in online revenue in 2025, with stabilising growth. Monthly performance through 2025 showed consistent demand and limited volatility, reflecting the category's functional, need-based purchasing behaviour.

KEY CATEGORY FACTS

- Ecommerce plays a core role in discovery and fulfilment with online penetration standing at ~14%
- eBay leads category ecommerce, ranking highest by GMV (A$238 million) and purchase intent
- Amazon consistently places top-three acoss GMV and intent

Source: ECDB



Which of the following product categories have you purchased online in the last 12 months and who did you purchase from?

41%
Intend to purchase online in 2026

Alcohol

The alcoholic beverages ecommerce market reached approximately A$619 million in 2025, with growth normalising after pandemic-driven spikes and is forecasted to grow at ~8–10% annually until 2030. While online penetration remains relatively low (5.5%), it is accelerating quickly.

KEY CATEGORY FACTS

- Ecommerce revenue forecasted to grow to A$904 million by 2030
- Online ecommerce share of the total alcohol market projected to grow to 30% by 2030
- Omnichannel retailers dominate alcohol purchase intent, while Amazon remains a secondary but growing channel.

Source: ECDB

38%
Intend to purchase online in 2026

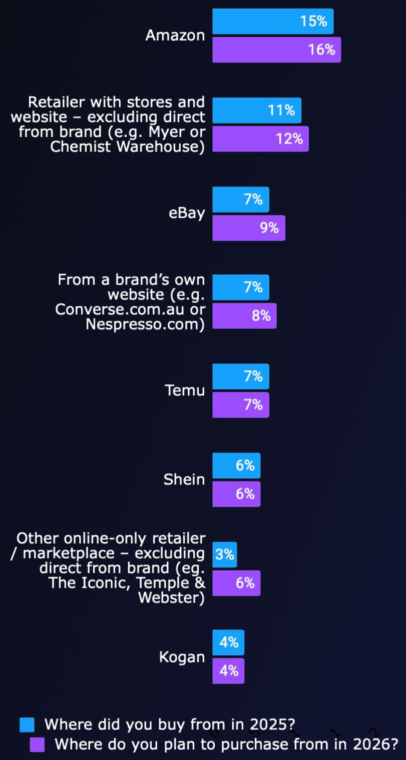
Luggage & Travel Gear

The Australian luggage and travel gear ecommerce market reached approximately A$979 million in 2025, with growth stabilising after earlier volatility. Demand rebounded in 2024 as travel normalised, and is forecasted to grow at a steady ~6–9% annually through 2030. Online penetration remains high at ~27–28% of total category sales, reflecting strong consumer comfort purchasing travel gear digitally.

KEY CATEGORY FACTS

- Ecommerce revenue projected to grow to A$1.4 billion by 2030
- Online penetration expected to stabilise to 28% by the end of 2029
- Marketplaces and online retailers together account for 28% of purchase intent

Source: ECDB



The Next Wave: Social Commerce & TikTok Shop

How Social Platforms Are Reshaping the Path to Purchase

The global social commerce market is expected to surpass

US$1 Trillion

by 2028, reflecting profound shifts in how consumers shop.

Social commerce is maturing rapidly in Australia, moving from an experimental channel to a meaningful driver of product discovery and purchase intent. Across platforms, the majority of consumers are now influenced by at least one social network, with Facebook (40%), YouTube (38%), Instagram (37%), and TikTok (29%) leading the landscape. Only 4% report not using social media at all, underscoring its ubiquity in shaping shopping behaviour.

Consumers are increasingly taking concrete actions after seeing products on social platforms. Sixty percent search on Google, 49% click through to a brand or retailer website, and 41% go straight to Amazon. Social media is now firmly embedded in the path to purchase, influencing both online and in-store behaviour.

While purchase intent within social apps remains mixed, certain features strongly encourage conversion. Easy in-app checkout, loyalty rewards, real customer videos, and platform-backed returns each motivate around 20% of shoppers.

Yet, 42% still prefer traditional retailer environments, signalling that trust and familiarity remain critical barriers.

Creators play a significant, but highly age-skewed role. More than 60% of 18–34-year-olds are more likely to buy after a creator recommendation, compared with just 8% of those 65+. This generational divide highlights where creator-led commerce will scale first.

Awareness of TikTok Shop is already high, and 16% say they plan to buy from it when available, driven by younger, higher-income, metro-based consumers. As these platforms expand commerce capabilities and integrate safer, more reliable purchase flows, social commerce is poised to capture a larger share of Australia's retail spend, especially among younger digital-native shoppers.

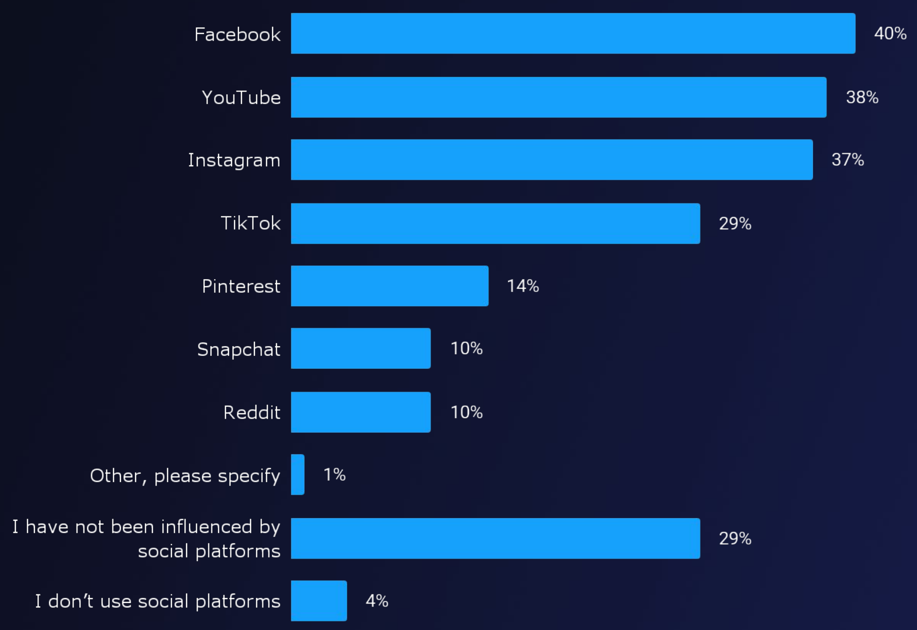
In the past 12 months, which social platforms have influenced you to consider or buy a product (either online or in store)?

Social Platforms Now Shape Most Shopping Journeys

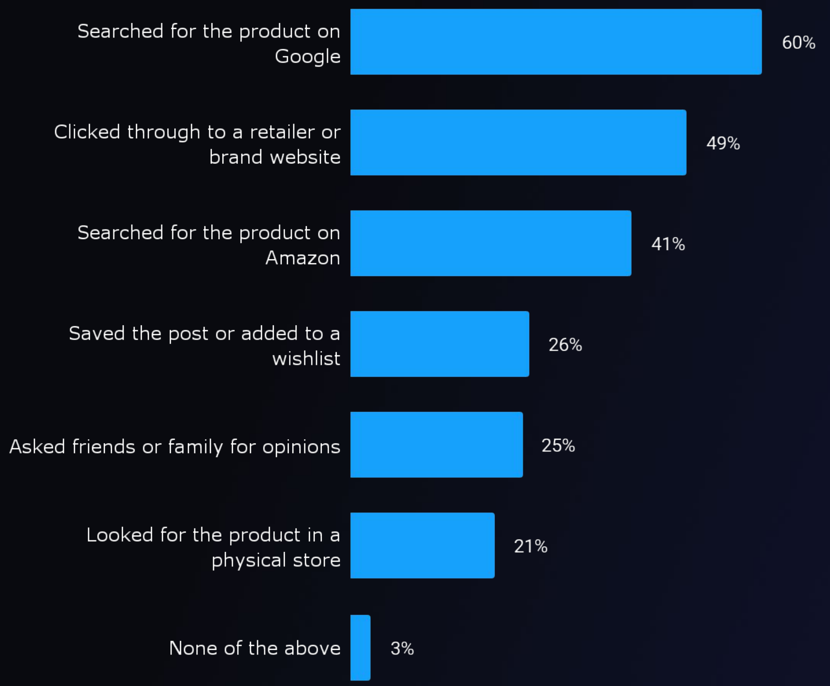
Social media's role in product discovery continues to expand, with the majority of consumers influenced by at least one platform in the past 12 months. Facebook, YouTube, and Instagram lead this space, each influencing over a third of shoppers, while TikTok now has an impact on 29% of consumers, reflecting its rapid rise as a commerce driver.

Even traditionally lower-engagement platforms such as Pinterest, Snapchat, and Reddit show notable influence, highlighting the diversification of social-led discovery.

Only 29% say they were not influenced at all, and just 4% report not using social media, pointing to the broad penetration of social platforms in retail behaviour.



You mentioned that social platforms have influenced your decision to consider or purchase a product. Which, if any, of the following actions have you taken as a result of that influence?



Social Influence Drives Strong Down-Funnel Behaviour

Social content is prompting meaningful action well beyond passive browsing. Six in ten consumers say they move straight to Google after seeing a product on social media, making search the most common next step in validating interest or comparing options.

Nearly half click directly through to a brand or retailer's website, and 41% go straight to Amazon, highlighting how social media now fuels marketplace discovery as much as it does direct-to-brand traffic.

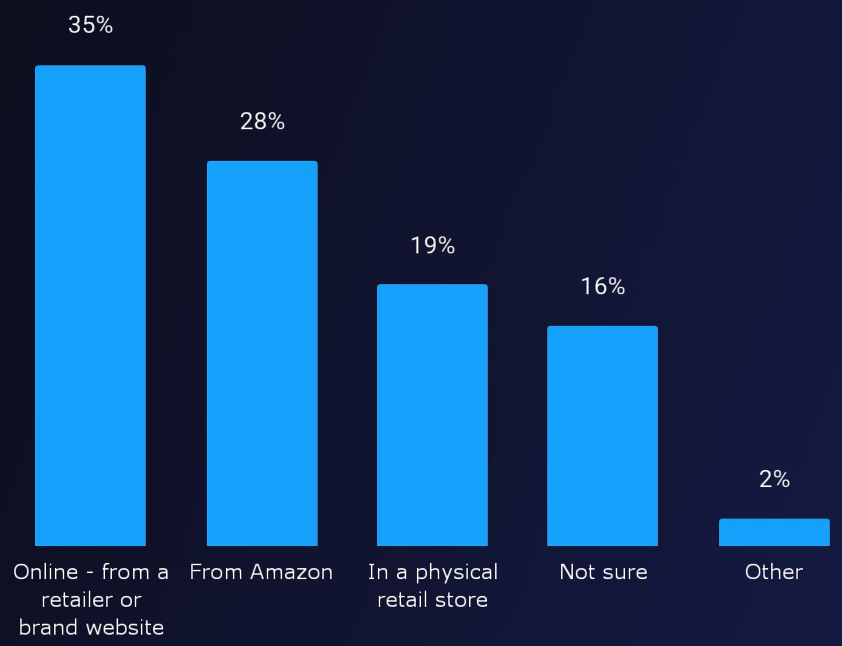
Many consumers also take extra steps to revisit or confirm their interest, with 26% saving posts and 25% seeking opinions from friends or family.

Where Social Inspiration Most Commonly Converts

When a product catches their attention on social media, over a third of consumers say they are most likely to complete the purchase on a brand or retailer's website. This reflects the strong role of social content in driving direct traffic and reinforcing brand-owned channels.

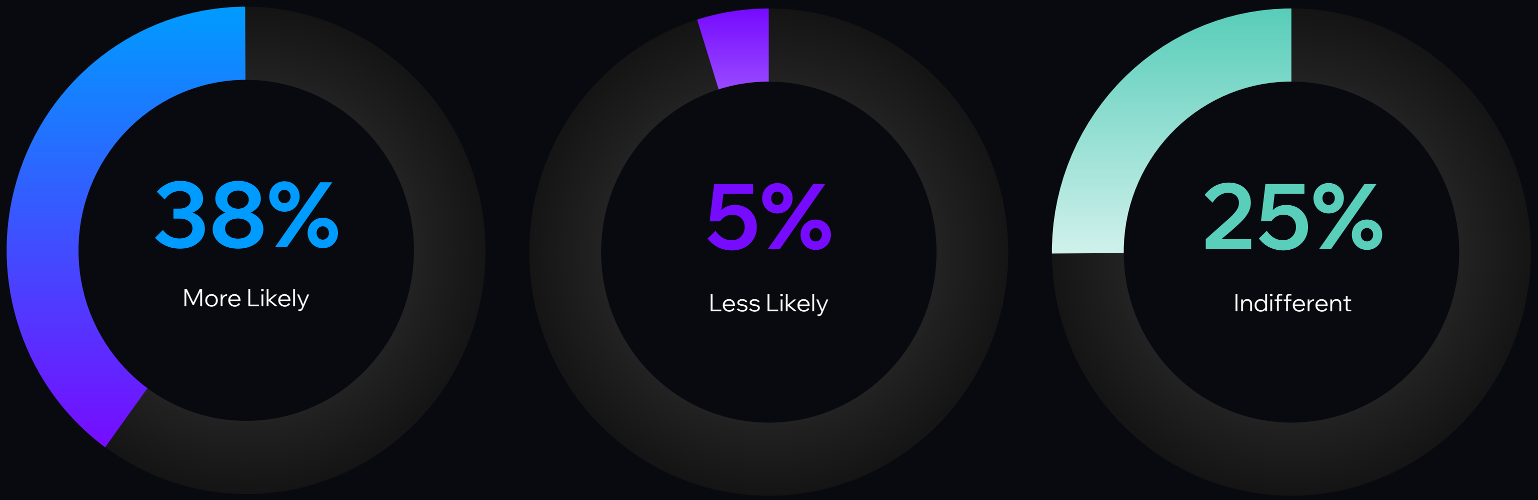
Amazon sits close behind at 28%, illustrating its growing position as a trusted, convenient follow-up destination when shoppers move from inspiration to purchase.

A further 19% prefer to buy in store, showing that social discovery continues to influence omnichannel behaviour.



When a creator you follow recommends a product, how much more or less likely are you to purchase it?

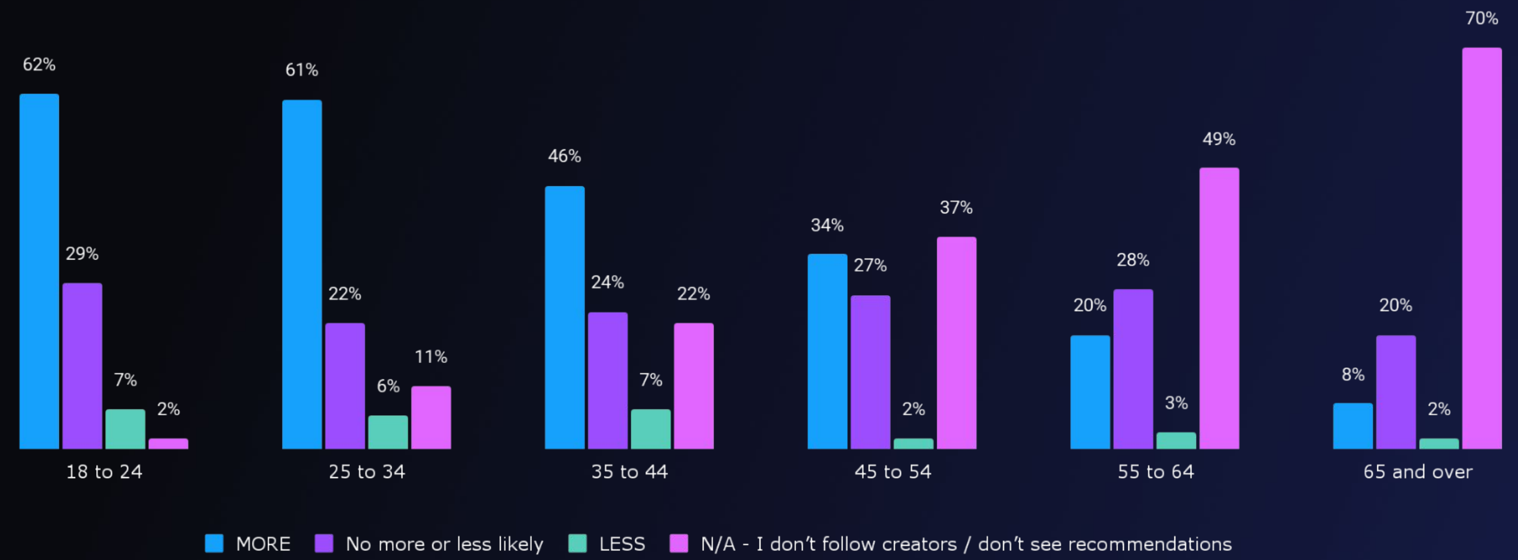
Creators Can Sway Buying Decisions, But Not Universally



33% I don't follow creators / don't see recommendations

Shopper Age Shapes Impact of Creator Recommendations

Creator recommendations resonate very differently across age groups. Younger consumers are far more responsive, with 62% of 18–24s and 61% of 25–34s more likely to purchase after a creator endorsement. Influence then declines steadily with age, falling to 20% among 55–64s and just 8% for those 65 and over.



Question: When a creator you follow recommends a product, how much more or less likely are you to purchase it?

TikTok Shop US

The global ecommerce landscape is undergoing a tectonic shift, moving from the "search-and-retrieve" utility model perfected by legacy giants like Amazon to a "discovery-and-demand" model pioneered by social commerce platforms. TikTok Shop is at the forefront of this disruption.

TikTok Shop is no longer an experimental feature but a dominant retail engine. With US monthly sales consistently exceeding $1 billion and shopper penetration approaching half of the user base, the platform has successfully operationalised "viral velocity" into gross merchandise value. For the Australian market, the implications are immediate: the infrastructure is being laid, the partnerships are being signed, and the consumer demand is latent but high.

TikTok Shop is poised to enter the Australian market not as a social media feature, but as a fully mature, logistics-backed ecommerce incumbent. The US data serves as the proof of concept: with 46% user penetration and multibillion-dollar GMV, the model works.

For the Australian market, the pieces are in place.

Consumer Demographics

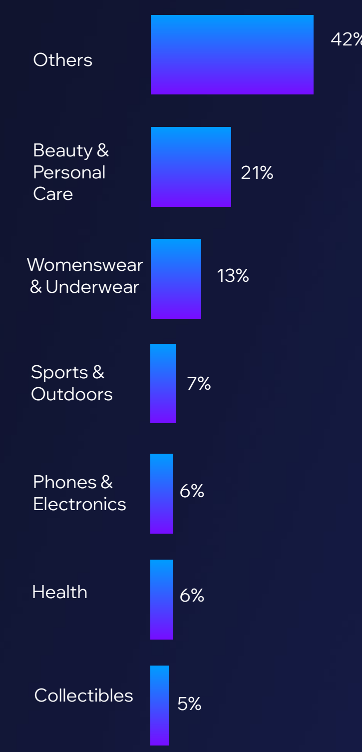
46%
Of TikTok users in the US made at least one purchase on the platform

18-24
Years old are 3.2x more likely to shop on the platform

50%
Of the shopper base purchases at least once per month

70%
of US TikTok users say they discover new products on the platform

Top 10 categories in 2026



Source: Statista

TikTok Shop allows users to buy products directly within the TikTok app. Are you aware of TikTok Shop, and do you plan to purchase from it if or when it becomes available in Australia?

TikTok Shop Already on Australians' Radar Ahead of Full Launch

Awareness of TikTok Shop is already strong in Australia, even ahead of its full-scale local rollout. More than half of consumers recognise the feature in some capacity, and 16% say they plan to purchase from it when available. This early adopter segment reflects rising comfort with in-app shopping and the influence of short-form content on purchase behaviour.

A further 21% are aware of TikTok Shop but do not intend to buy from it, suggesting that trust, product quality, and perceived safety will need to be earnt.

Notably, 32% of consumers don't currently use TikTok, indicating that the platform's commerce growth will be concentrated among younger and more digitally engaged cohorts rather than the total market.

76%

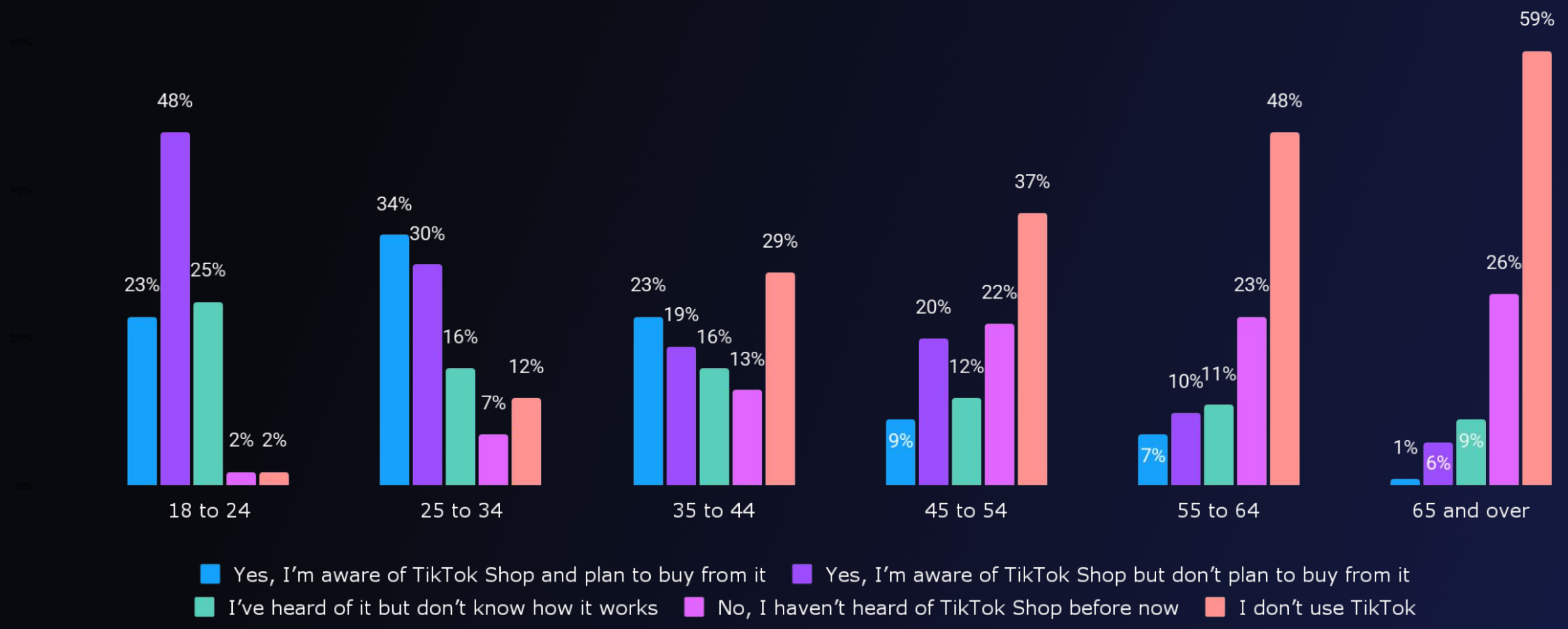
Of TikTok users surveyed have heard of TikTok Shop

45%

Of TikTok users surveyed plan to buy from TikTok Shop or want to learn more about it.

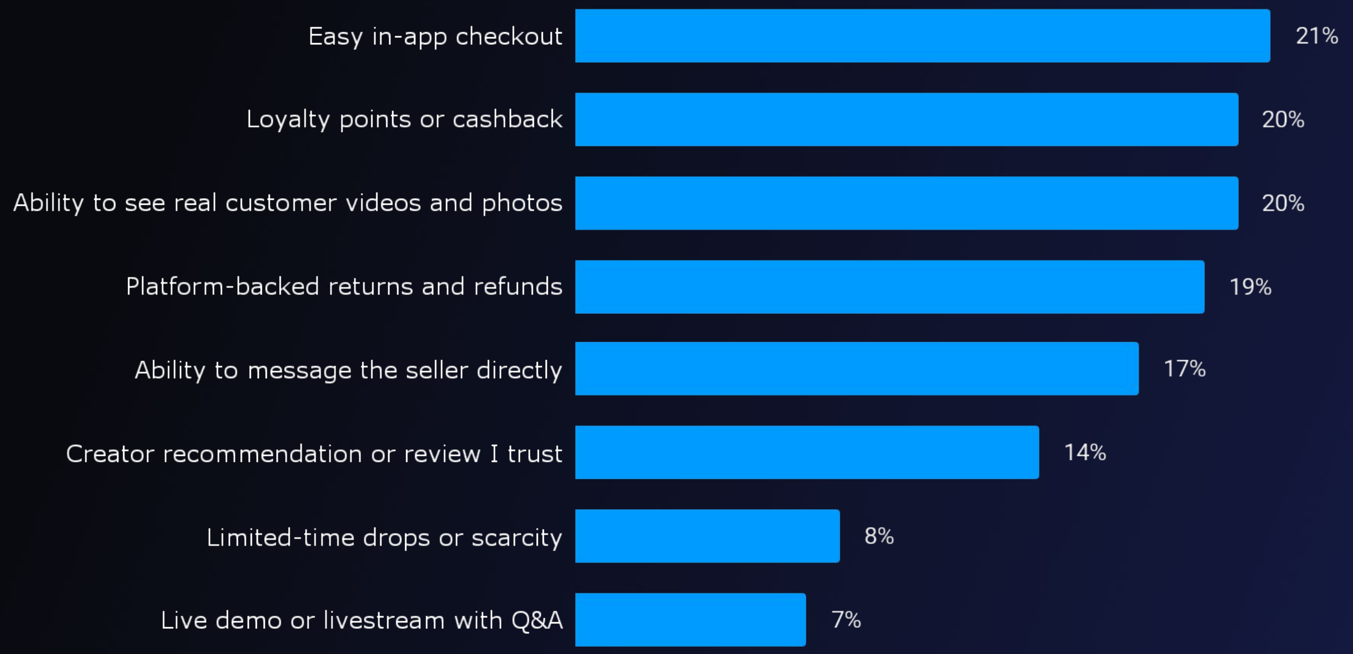
TikTok Shop Interest Strongest Among Younger Australians

TikTok purchase intent is strongest among younger Australians, particularly those aged 25–34 (34%) and 18–24 (23%).



Question: TikTok Shop allows users to buy products directly within the TikTok app. Are you aware of TikTok Shop, and do you plan to purchase from it if or when it becomes available in Australia?

Which, if any, of the following would most encourage you to complete a purchase on a social platform (e.g. TikTok Shop) rather than a retailer or marketplace website?



2026 Behaviour Predictions

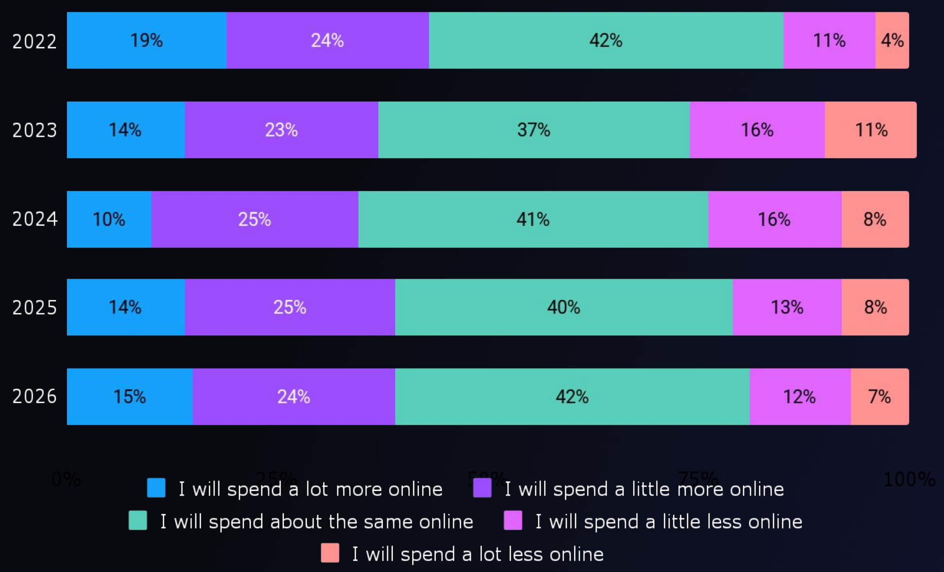
The shifts set to shape shopping behaviour in 2026

How do you expect your shopping habits (not including groceries) to change in 2026 compared to previous years?

+45%

Will buy different products from Amazon.com.au than they would have previously

How much do you expect to spend on online shopping (not including groceries) in 2026 compared to 2025?



Online Spending Intent Rises Modestly as Most Consumers Hold Steady

Looking specifically at 2026, most consumers expect their online spending to remain stable, with 42% saying they will spend about the same as last year.

Growth comes from the 39% who plan to spend more online, driven by a slight lift in those expecting to spend a lot more, rising to 15%.

Meanwhile, only 19% expect to reduce their online spending, continuing a gradual decline in cutback sentiment. The data suggests that online shopping has become a fixed part of household routines, with consumers increasing spend selectively, prioritising value, and continuing to shift everyday purchases into ecommerce channels.

The Path Forward for Brands

How to compete, convert, and scale on marketplaces

1.

Optimise marketplaces for multi-channel discovery

Build marketplace content to perform across search, social, and AI-led discovery.

2.

Build for repeat purchase, not just acquisition

Prioritise availability, reviews, and loyalty mechanics over one-off promotions.

3.

Use social to create demand and marketplaces to convert

Align social content with marketplace assortments and make products instantly findable where consumers complete purchase.

4.

Win the organic shelf and deploy paid search with intent

Strong content and reviews drive efficiency, while paid search supports product launches, testing and incremental reach.

5.

Scale faster by partnering with marketplace specialists

Work with experienced partners to unlock expertise, technology, and operational scale.

As we look ahead to 2026, the Australian e-commerce landscape is entering a new phase. Marketplaces remain central to how consumers discover, evaluate, and purchase products, but the paths leading into them are becoming more complex. Discovery is now spread across search, social platforms, and emerging AI-led tools, with marketplaces increasingly acting as the point where intent turns into action.

Our latest research shows that marketplaces are no longer just acquisition channels. They are trusted environments where shoppers return repeatedly, particularly in essential and high-consideration categories. Consumers are influenced by social content, creator recommendations, and peer reviews, but when it comes time to purchase, they continue to gravitate toward platforms that offer familiarity, convenience, and confidence.

For brands, this creates both opportunity and pressure. Success on marketplaces in 2026 is less about simply being present and more about how well you execute. Strong content, consistent availability, credible reviews, and a clear role for marketplaces within a broader ecosystem are now critical. Brands that rely solely on paid visibility or treat marketplaces as secondary channels risk being outpaced by those that invest for the long term.

This is where partnership matters. Navigating marketplace growth today requires specialist expertise, technology, and operational scale. At Pattern, we work with brands to ensure their marketplace presence supports their wider business goals, driving sustainable growth while maintaining brand integrity across channels.

The brands that will win in 2026 are those that move decisively, focus their efforts, and build for repeat behaviour. Now is the time to sharpen your marketplace strategy and set it up to scale.

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About Pattern

An overview of the leading Ecommerce Accelerator

Pattern Global Marketplace Accelerator

#1
Amazon seller globally

60+
Marketplaces

100+
Countries we sell in

22
Global offices

~$2B
Annual revenue

1.5m
Units shipped weekly

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Salt Lake City. UT
Oakland. CA

Europe
London
Munich
Niš
Kraljevo

Middle East
Dubai

Asia Pacific
Hong Kong
Guangzhou
Singapore
Manila
Pune

Australia
Sydney
Melbourne

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Asia Pacific
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1

WE BUY YOUR INVENTORY

2

WE SELL ON GLOBAL MARKETPLACES

3

WE DO EVERYTHING ELSE

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- FBA PREP
- BUNDLING
- LISTING CREATION
- LISTING MAINTENANCE
- CONTENT CREATION
- AD STRATEGY
- AI AD TECH
- SEO COPYWRITING
- BRAND MANAGER (SAS)
- ACCOUNT HEALTH
- CUSTOMER SERVICE
- FULFILLMENT STRATEGY
- GLOBAL LOGISTICS
- CHANNEL COMPLIANCE
- INTERNATIONAL EXPANSION

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