IPSOS iris

RETAIL CATEGORY REPORT

November 2024

Australia's digital audience measurement currency endorsed by IAB Australia

Ipsos iris launched in Australia in January 2023. It is the IAB Australia endorsed digital measurement system delivering accurate audience measurement and competitive insights for Australia's leading digital publishers and global platforms.

Report Content Summary

About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Australians are trading down & seeking value as the cost of living remains high

Seven out of ten Australians expect the cost of their general household shopping, the price of food, and their household utilities bills to increase in next six months[1]. As Australians focus on value for money, loyalty offers, discounts, and trade down where possible, it's no surprise online discount brands such as Temu, now make up 15% of all time spent within the Retail & Commerce category[2] and grocery and supermarket app audiences grew 23% YOY reflecting increased value seeking.

What can the online behaviour of Australians tell us?

In today's challenging economic climate, the retail sector can greatly benefit from the digital behavioural data provided by Ipsos iris. This tool offers a comprehensive view of where Australians are shopping for products and information online, which apps and websites they frequent, and their levels of engagement. It also identifies who is more likely to be engaged, tracks year-over-year and monthly trends, examines cross-consumption patterns (such as second-choice preferences), and delivers detailed competitive insights and share analysis. These insights can be leveraged to enhance outcomes for Australians in search of retail products and services, and to pinpoint your brand's unique selling propositions.

What you can expect to see in this report

This category report will deep dive into the usage, behaviours and profiles of Australians' shopping across a wide range of online retail and commerce sub-categories and brands, with a focus on selected sub-categories including Grocery, Fashion & Beauty, Department, Discount Store and Multi-category Retailers websites and apps.

Retail & Commerce category – Lay of the Land

From July'23 to Jul'24 Australians spent a total of $465bn on retail with 11% or $51.3bn attributed to online purchases[3]

Before we dive into the report, it's useful to know what the overall online landscape in relation to the Retail & Commerce category and its sub-categories look like, in terms of online audience usage.

Ipsos iris tells us that 99% (21.1M) of all online Australians age 14+ access Retail & Commerce online websites or apps (up 3% YOY). Within this category, General Retail & Commerce (Amazon, Etsy, etc.), Consumer Electronics, and Voucher/Rewards websites and apps have the largest audience reach.

70% or 15M Australians Age 14+, access Discount, Department or Multi-category retailers (Kmart, Big W, Catch.com.au. Target, etc.), which is followed closely by Fast Food & Delivery apps at 68%.

Total AU internet population (Age 14+):

21.5M

Retail & Commerce category[4]

21.1M | 99%

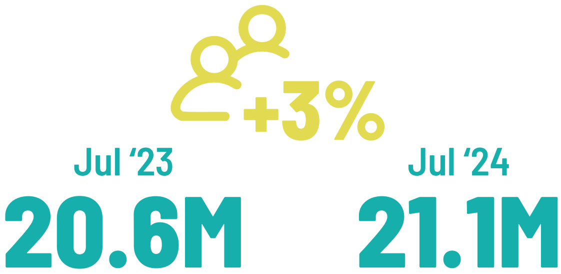
Audience 000s | Audience Reach

General Retail & Commerce **19.3M | 90%**
Consumer Electronics **18.5M | 86%**
Vouchers/ Rewards **17.9M | 84%**
Grocery/ Supermarket **16.5M | 77%**
Department, Discount or Multicategory **15M | 70%**
Fast Food & Delivery **14.5M | 68%**
Fashion, Style & Beauty **14.5M | 68%**
Homes & Garden **13.2M | 62%**
Auctions **12.4M | 58%**
Loyalty Points **12.4M | 58%**

Steady audience growth across the total Retail & Commerce category P14+, with Australian Gen X and Boomers being the biggest drivers of total category growth

At an overall category level, both audience and time spent has grown in the past 12 months, with a particularly strong spike in time spent. Australians are spending 70 minutes more per month within the Retail category than a year ago.

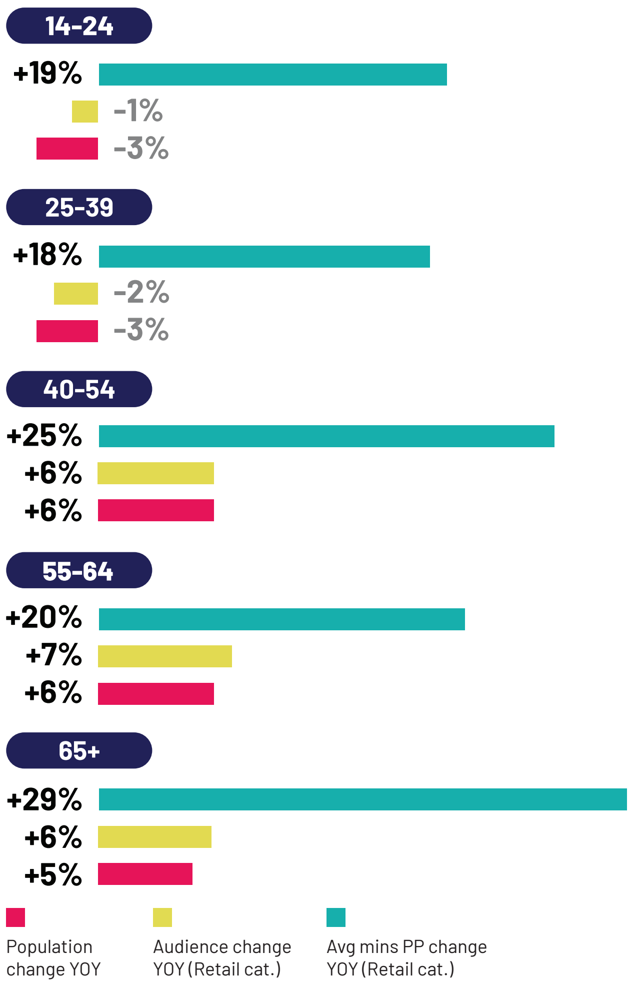
Retail & Commerce category - Total audience[5]



Retail & Commerce category - Average mins per person

Using Ipsos iris, we can drill down by age group and find the strongest YOY audience growth within the retail and commerce category has been amongst Australians aged 40+ (Gen X and Boomers), although this is roughly in line with the population change. We do see a significant increase in engagement per person across all age demos.

Retail category audience and ave mins per person % change - YOY by age group[6]



Category insights – usage, growth, engagement

Australians are showing increased interest in outdoor activities, leisure, health products/services, pet care, and arts & crafts as the cost-of-living increases

In contrast to almost 70% of Australians identifying financial concerns as their primary source of stress^, many retail sector sub-categories demonstrated notable resilience and significant audience growth from July 2023 to July 2024.

During this period, there was a significant increase in the number of Australians visiting outdoor, leisure, health products/services, pet care, and arts & crafts websites or apps, with these categories experiencing strong double-digit audience growth year-on-year, even though most of them are non-discretionary retail categories.

These shifts make sense, as Australians are making the most of the outdoors, focusing on their health, and enjoying their pets and crafts as financial stress grows, all proven great way to reduce stress.

Top 10 Retail & Commerce sub-categories by audience growth past year

	Audience 000s 2024	Audience Reach % Change YOY[7]
Retail & Commerce (whole category)	21.1M	+9%
Flower Shopping	358K	**+86%**
Outdoor / Leisure	6M	**+28%**
Pets	4M	**+25%**
Health	10M	**+17%**
Stationery / Arts / Craft	8M	**+16%**
Games & Toys	4.5M	**+12%**
Vouchers / Rewards	17.9M	+9%
Homes & Garden	13.2M	+9%
Grocery / Supermarket Shopping	16.5M	+9%
Loyalty points	12.4M	+8%

Temu, Samsung, Chemist Warehouse and Big W produce significant audience increases within category since last year

Despite inflation, every retail & commerce brand in the top 15 list by audience size produced year-on-year audience growth, with Temu and Samsung showing the strongest increases, followed by Chemist Warehouse and Big W.

The strong growth for Temu, Big W and Chemist Warehouse likely comes from Australians needing to seek value where possible, as both essential and discretionary spending becomes more expensive across the board.

Top 15 Retail and Commerce brands by audience[8]

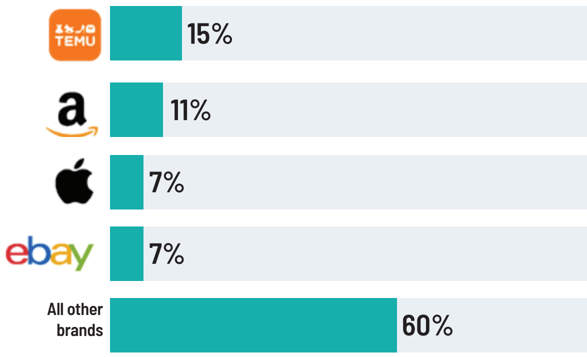
	Audience 000s 2024	Audience Reach % Change YOY
Amazon	15.9M	+8%
Woolworths	13.3M	+9%
Temu	13.3M	+31%
Apple	13.2M	+8%
eBay Australia	12.3M	+ 1%
Everyday Rewards	10.9M	+7%
Flybuys	10.6M	+6%
Coles Group	10.5M	+13%
Kmart	8.5M	+3%
Bunnings Warehouse	8.4M	+6%
Big W	8.3M	+14%
McDonalds	7.5M	+11%
Chemist Warehouse	6.9M	+20%
Samsung	6M	+23%

Using Ipsos iris to investigate the big winners of time spent share within the total retail & commerce category, we can see that the top three online brands are Temu, Amazon and Apple.

It's likely that Temu's success in driving this high engagement outcome stems from "gamification", flash deals, and rock-bottom prices with an Aladdin's cave of inventory to search.

Temu takes top spot for share of minutes, accounting for 15% of all time spent on retail & commerce websites or apps[9]

Share of mins- Retail & Commerce category

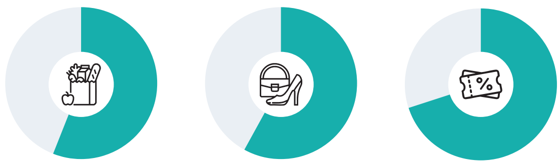


Apps are becoming increasingly essential for the Retail and Commerce categories

App usage within the Retail & Commerce category make up almost 6 out of 10 total minutes spent within the category. This shows how important engaging and properly thought-out feature-based apps are for retailers in retaining and growing customer bases, especially amidst tighter household budgets, where they are highly likely to be seeking loyalty points and discounts via retailer apps.

While time spent on apps as a share of total online activity has declined 81% to 73% from Jul'23 to Jul'24, we see the inverse for Grocery, Fashion/Style/Beauty and Voucher/Rewards sub-category apps which are all accounting for more time within each sub-category than they did a year ago.

Share of mins spent within sub-category[10]



Grocery Supermarket apps:	Fashion, Style, Beauty apps:	Vouchers & Rewards apps:
56% of total mins July 24 vs. 47% July 23	**58%** of total mins July 24 vs. 52% July 23	**70%** of total mins July 24 vs. 52% July 23

As cost saving features become more important, Australians are embracing supermarket and grocery apps in growing numbers

Year-on-year, there has been a **23% increase** in the number of Australians using grocery/supermarket apps[12]

Apps account for **59%** of all time spent within the total Retail & Commerce category July '24

Average number of Retail & Commerce mobile apps per person

Highest number of retail apps installed

- P25-54 > 7.6 apps
- White-collar > 7.3 apps
- Females > 7.3 apps

Lowest number of retail apps installed

- Males 14+ > 5.9 apps
- Non-main grocery buyer > 5.6 apps
- P65+ > 4.8 apps

The average Australian 14+ has 6 retail apps installed

App usage - Grocery/ Supermarket sub-category - Audience 000s[11]

Jul '24
7,950,000

+23%

Jul '23
6,450,000

Retail Mobile Apps – Topline user profiling

App user profiling tells us a lot about who is more likely to use certain types of retail apps. You're more likely to find health focused middle-aged females on loyalty/ rewards apps, and equal numbers of male and female 25–54-year-olds who are fashion driven and heavy social networkers, on general retail & commerce apps like Amazon and Etsy.

Fast food and delivery app users are typically early adopters of new products and lovers of all things travel.

Retail Mobile App sub-category[12]	Examples		Who is more likely to use these mobile apps?[13]
Fashion, Beauty, Style	Examples: THE ICONIC, SHEIN, depop		• Female • Age 25-39 • Parent/Guardian, lower personal income skew • More influenced by celebrities • Makes more purchases online vs. in-store
Fast Food & Delivery	Examples: Menulog, McDonald's, Uber Eats		• Age 25-39 • Metro, Main GB, Mid-level personal income • Early adopters of new products • Go to trendy places to eat and drink • Heavy travel category users
General Retail & Commerce	Examples: Amazon, Etsy, AliExpress		• Age 25-54 • Parent/Guardian • Keep up with the latest fashions • Spend a lot of money on toiletries & cosmestics • Heavy social networking users
Grocery/ Supermarket	Examples: Woolworths, coles, ALDI		• Strong female skew • Age 25-54, QLD & SA, Caucasian, Main GB • Lower personal and HH income • Make more purchases online vs. in-store • Read a print mag in past week
Loyalty Points & Rewards/ Voucher	Examples: My 7 Eleven, flybuys everyday rewards		• Female • Age 40-54 • Heavy health category users • Balanced metro/regional • Less likely to be influenced by celebrities

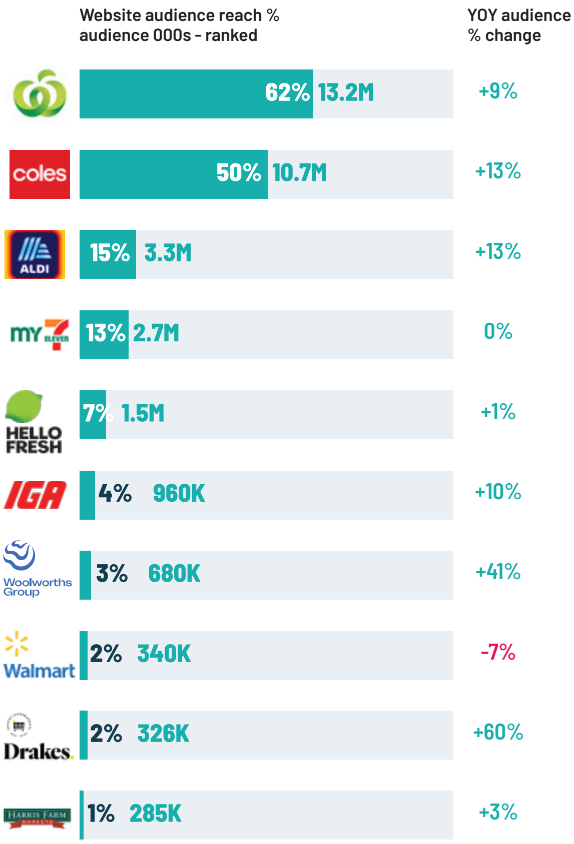
Grocery and Supermarket under the lens

Woolworths ranks #1, while Coles & Aldi both have double-digit growth

Other notable year-on-year audience increases include the Woolworths Group (Big W, Woolworths, Everyday Rewards, Milkrun, MyDeal, HealthyLife, etc.), Drakes and IGA.

It appears Australians are visiting a wider array of grocery and supermarket brands online vs. a year ago, which could be possibly be linked to a more focused search for value and offers across all demographics.

Grocery/ Supermarket sub-category Brand reach & YOY change[13]



Aldi Key YOY trends

19% increase
in **low-income** Australians* using the brand

17% increase
in **high-income** Australians* using the brand

Woolworths ranks #1 for app audience, while Coles brings on 1.5M new app users YOY and becomes #1 growth app

App audience growth

While the Woolworths app has the highest number of users and the most exclusive audience, the Coles app performed the strongest YOY in terms of bringing new users to the app, growing their app audience by an impressive 61%!

If we look closer at the audience growth of the Coles App user base, we see that this was strongly driven by Males with a 78% YOY increase vs. a more subdued 52% increase for females

+78%

coles

+52%

Aldi and Hello Fresh apps also grew their app user base in the past 12 months but from a small base.

App engagement growth

In terms of average minutes spent per person, Woolworths has increased their app engagement per user by a strong 18%, with Hello Fresh coming in at 10% for YOY engagement growth.

This is likely due to Australian shoppers spending more time on these apps pre-planning their shop, in the hope of reducing end price at the checkout.

If we look closer at engagement growth within the Woolworths App user base, we can see that this was strongly driven by Australians with children in the home, with a 26% YOY increase in average minutes per person vs. a more subdued 14% increase for those without children in the home.

+26%

Mins per person

Mobile App	Audience 000s 2024[14]	Change YOY	Ave Mins[15]	Change YOY
coles	3.8M	**+ 61%**	22.1 mins	+ 4%
	6.3M	+ 19%	35.5 mins	**+ 18%**
ALDI	319K	+ 12%	7.1 mins	+ 9%
HELLO FRESH	541K	+ 6%	12.5 mins	+ 10%

Inflation is the likely driver of lower app exclusivity and higher cross-use

On further analysis via Ipsos iris, we see there has been across-the-board declines in the exclusive use of these grocery apps, and an increase in the cross-use of the top three grocery app brands.

This likely points to a decrease in loyalty by Australian grocery buyers, in an attempt to lower non-discretionary household spend, and broaden their choices in tougher economic times.

Grocery App exclusivity YOY comparison[15]

coles | | ALDI

Exclusive user base

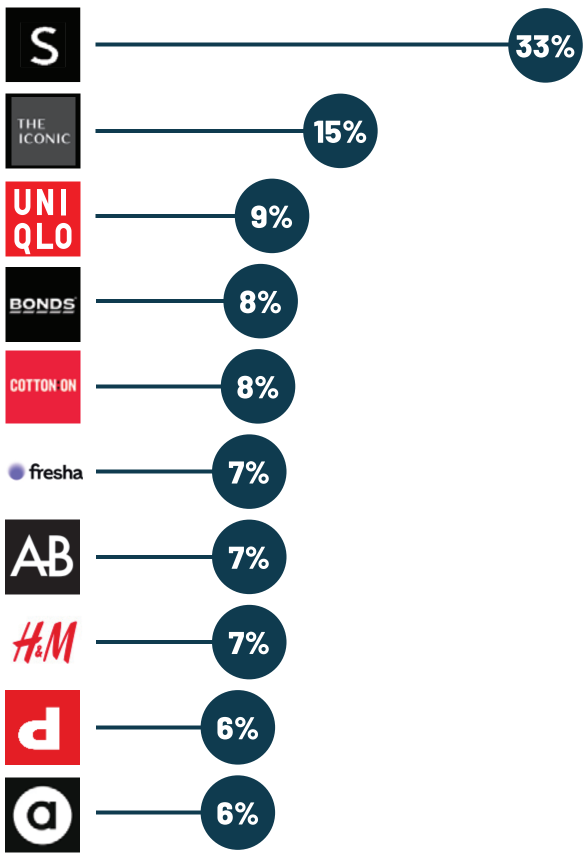
Jul'23 67% → Jul'24 57%	Jul'23 33% → Jul'24 32%	Jul'23 29% → Jul'24 23%

Fashion, Style & Beauty and the "lipstick effect"

Shein is the #1 brand in terms of audience share for the Fashion, Style & Beauty sub-category, twice as much as the #2 brand The Iconic

It's not surprising that in a time of tighter wallets at the checkout, Shein, known for their incredibly low prices, comes in #1 for brand share within this sub-category, which is up 7% compared to the same time the previous year (33% in Jul'24 vs. 26% in Jul'23).

Fashion, Style, & Beauty sub-category – Brand groups (top 10 by audience share)[16]



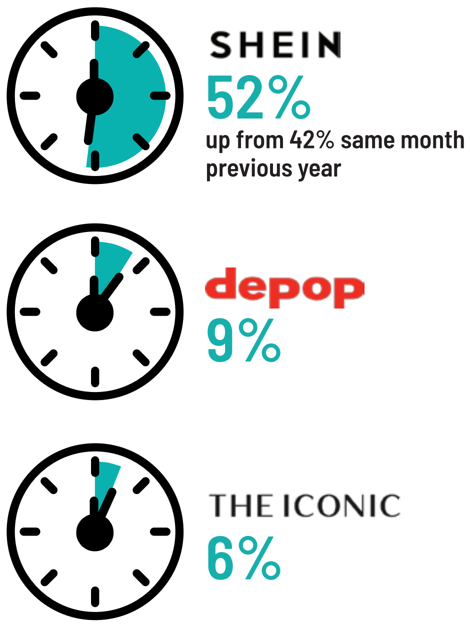
Shein accounts for over half of all time spent within Fashion, Style, & Beauty sub-category[17]

Like Temu, another online discount marketplace mentioned earlier in the report, we see Shein also strongly leads the pack for the share of total time spent within this sub-category. This unsurprisingly points to stronger topline engagement with discount brands, amidst an economic environment where your dollar buys you less than it did previously.

This is supported by the fact that this metric is up from 42% share of total mins YOY for Shein.

Depop, the circular fashion brand that allows you to buy or sell second hand fashion goods, came in at #2.

Share of minutes- Fashion, Style & Beauty sub-category



It's clear to see that the "Lipstick Effect" is here in 2024

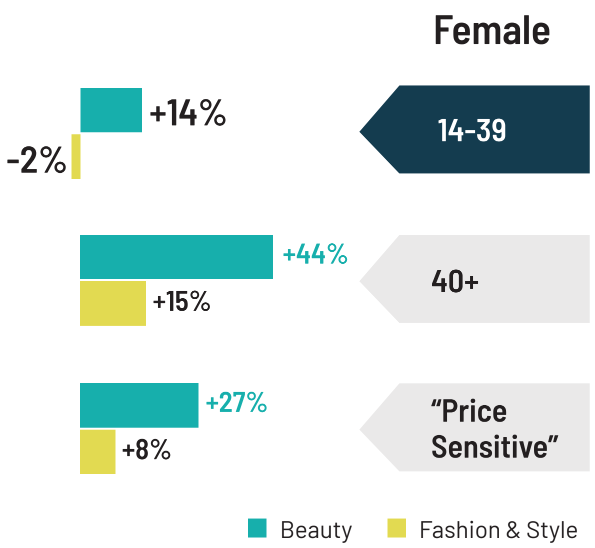
With 13 consecutive interest rate hikes from Jan 2023 to July 2024, it appears we are now seeing what is called the "Lipstick Effect" take place in Australia.

The "Lipstick Effect" is the theory that when facing an economic crisis consumers will be more willing to buy smaller, less costly luxury goods, instead of buying expensive bags and clothing to replace their wardrobe. For example, people will buy smaller cosmetics and beauty products, such as such as high-end lipstick, etc.

As highlighted below, we can see a clear macro increase in the Beauty sub-category audience compared to fashion sub-category. It's likely more Australians are purchasing fewer and smaller luxury items, such as lipstick and beauty products, instead of replacing their wardrobes as frequently due to the high cost of living.

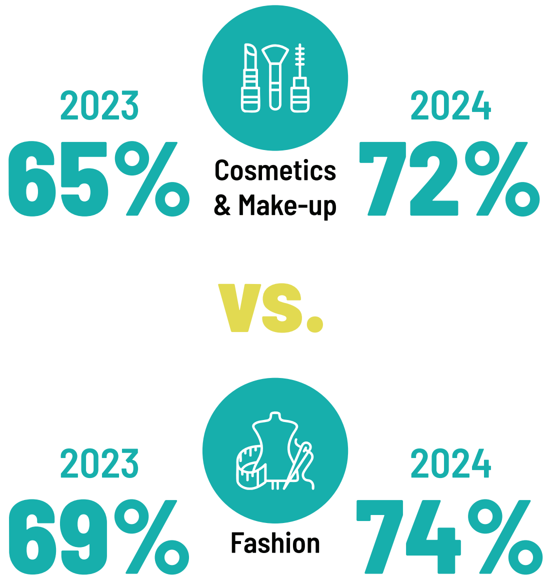
Via further analyse, we see an audience increase year-on- year for beauty products, with an inverse decrease in fashion for the younger female demographic (14-39), although, all listed female demographics follow the "Lipstick Effect" hypothesis.

Sub-category change YOY (Jul 23 to Jul 24)[18]



We can also see that Premium and Luxury buyers are increasing their use of budget brands as the cost of living continues to remain high

Premium/ luxury brand audience cross-use of budget/ economy brands - July'24 VS. July'23[19]



Growth of budget, economy and discount retailers

Big W, David Jones and Spotlight all produced strong double-digit audience growth YOY

Discount department store Big W grew their online audience by 14% Jul '23 to Jul '24, this growth was even stronger amongst Australians with children in the home and a HH income of <$60K (+ 31%).

David Jones also had strong Jul'23 to Jul'24 audience growth with a 15% audience increase. This was likely driven by the up-market department store's EOFY cosmetics/makeup sales, which is in line with the earlier mentioned "Lipstick Effect".

Spotlight's YOY increase shows a growing increase in Arts and Crafts in times of financial hardship which is also shown in the opening of the report, where we see a 16% increase in the Stationary/Arts/Craft category

Top 10 Department, Discount Store or Multi-category Retailers by audience 000s - July'24[20]

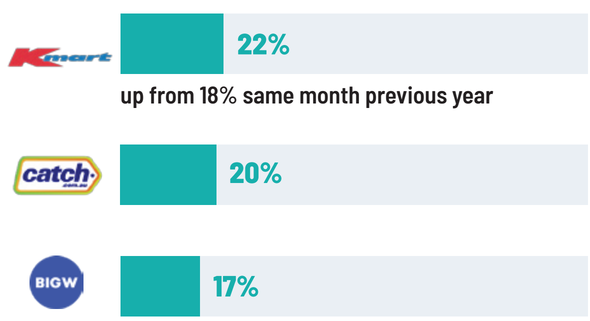
	Audience 000s 2024	Audience Reach % Change YOY
Kmart	8.4M	+3%
Big W	8.3M	+14%
Catch.com.au	5.1M	-3%
Target Australia	3.8M	+13%
Kogan	3.6M	+10%
Myer	3.6M	+12%
David Jones	1.7M	+15%
Spotlight	1.4M	+22%
Best & Less	1.2M	-17%
Dick Smith	980K	+10%

Budget, economy and discounts brands take out the top three for the greatest amount of time spent in this sub-category

Australians are spending more time on Kmart, Catch.com.au and Big W sites or apps than the more premium brands like Myer or David Jones.

Kmart takes the top spot for share of minutes within the sub-category, accounting for just over a 5th of all time spent on Department, Discount Store or Multi-category websites or apps, which is up from 18% YOY.

Share of minutes - Discount Store or Multi-category retailer sub-category

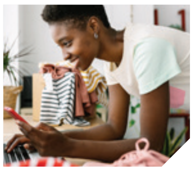


All time visiting category[21]

Key Takeaways

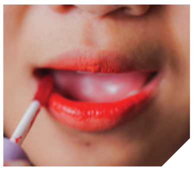
Steady audience growth across the total Retail & Commerce category, with Australians in the Gen X and Boomer age bands the biggest drivers of total category growth.

Australians are showing increased interest in outdoor activities, leisure, health products/services, pet care, and arts & crafts as the cost of living increases.



Discount brand Temu had 31% YOY audience growth & takes top spot for share of minutes, accounting for 15% of all time spent on total retail & commerce websites or apps.

Apps are become increasingly essential for the Retail & Commerce brands, especially Grocery, Fashion and Rewards. Inflation and the higher cost of living, however, appear to be driving a decrease in loyalty across grocery apps and increased brand repertoire.



With 13 consecutive interest rate hikes in 15 months, we are now seeing what is called the "Lipstick Effect" take place in Australia. We can see a clear macro increase in the Beauty category audience compared to fashion.

Premium/luxury brand buyers are growing their budget/economy brand cross-use as the cost of living continues to remain high.

Australians are spending more time on discount economy brands like Kmart, Catch.com.au and Big W, than they are on premium brands like Myer or David Jones.

Research scope and methodology

Why Ipsos iris?

A level playing field for digital content owners and advertisers

IAB endorsement validates the rigor of the operating system, methodology and a nationally representative panel (demos, geosplits etc.).

A measure of audiences for digital content

Huge pool of data on digital behaviour collected every second from 8,000 devices, stemming from a single source passive panel, which allows for de-deduplicated cross device consumption analysis.

Second-by-second monitoring of usage of all apps and websites

More effective ad placement and communications strategy from greater understanding of content consumption across different devices and genres.

Demographic, media usage and behavioural profiling

Better audience targeting from enhanced granularity on age, location, socio-economic characteristics as well as purchase and lifestyle interests and offline media use.

Advanced attitudinal and lifestyle profiling

Deep audience profiling on key attitudes and interests including:

- Ambition; balance; spontaneity; adventure; environmental, charitable; money; appearance; active; fashion conscious; premium shopper; early adopter
- Cosmetics; health conscious; designer brands; tech adopter; home décor; travel fan; credit user; cultural diversity; price conscious; carefree; SVOD/BVOD fan; online shopper
- Ethical; celebrity follower; eco-friendly

Rich demographic and media usage profile

Age	Grocery Buyer Status	State
Gender	Children under 18	Metro vs Regional
Ethnicity	Parent or Guardian	FTA TV Last 7 days
Personal Income	Grandparent	Radio Last 7 days
Household Income	Work Status	Newspaper Last 7 days
Occupation	Education	Magazine Last 7 days

Robust methodology: 4 key inputs

1. Establishment survey
2. Mobile first single source panel
3. Site centric measurement
4. Data integration

Metrics and Sources

Ipsos iris digital metrics

- **Total online AU population Age 14+:** Total online population of Australians who are aged 14 years or older, this number is set and will not change in this report. See below for AU online population as of Jul'24:
  -Total AU internet population (Age 14+): 21.5M
- **Audience 000s:** The number of people in a target audience, who visited the selected media, i.e. 18.5M Australians 14+ visited the Consmer Electronics sub-category in the month of Jul'24.
- **Audience reach %:** The percentage of people in a target audience, who visited the selected media, i.e. 86% of online Australians 14+ visited the consumer electronics sub-category in the month of Jul'24
- **Audience affinity Index ("ix" or "index"):** TThe ratio of audience composition to the target audience composition (from the selected universe), e.g. Females are 20% more likely to use grocery apps vs. the average online Australian 14+.
- **Average Mins PP:** Average amount of time spent (minutes) by a person**Total Mins (MM):** The total time spent in minutes by the target audience on the selected digital media, category or brand.
- **Total Mins (MM):** The total time spent (minutes) from the selected media, by the selected target audience. Active time spent is measured for all visits without being inactive for longer than 30 mins.
- **Category:** Category Groups offer a consistent comparison of grouped data across different media owners by Content Category. Ipsos has made available Content Categories simplified from the IAB Global Taxonomy 2.0 that tagging media owners may assign to their Website Sections, Section Groups, or apps.
- **Sub-category:** Groupings that fall under the category, e.g. Voucher/Rewards sub-category will fall under the Retail & Commerce category

Sources

1 Ipsos Cost of Living Monitor: base 24,801 online adults under age 75 across 33 countries, interviewed March 22 – April 5, 2024
2 Ipsos iris Online Audience Measurement Service, Jul 2024 , People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce Category, Brand group, Mins Share %, Total Mins
3 Source: https://www.abs.gov.au/media-centre/media-releases/retail-turnover-holds-steady & https://www.abs.gov.au/statistics/industry/retail-and-wholesale-trade/retail-trade-australia/latest-release
4 Source: Ipsos iris Online Audience Measurement Service, July 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce category, Audience (000s), Audience reach %
5 Source: Ipsos iris Online Audience Measurement Service, July 2024 vs. July 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce category, Audience (000s), Audience time spent (Ave mins per person)
6 Source: Ipsos iris Online Audience Measurement Service, July 2024 vs. July 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce category, Audience (000s), Ave Mins PP
7 Source: Ipsos iris Online Audience Measurement Service, July 24 vs. Jul 23, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce category, Audience (000s), Audience reach % ^Ipsos Essential Report, January 3 to 8, AU Sample 503 respondents
8 Source: Ipsos iris Online Audience Measurement Service, Jul 2024 vs. Jul 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce Category, Brand group, Audience (000s)
9 Source: Ipsos iris Online Audience Measurement Service, Jul 2024 , People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce Category, Brand group, Mins Share %
10 Source: Ipsos iris Online Audience Measurement Service, Jul 2024 vs. Jul 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce Category, Brand groups, Total Mins MM
11 Source: Ipsos iris Online Audience Measurement Service, Jul 2023 vs. Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce Category, Grocery/Supermarket sub-category, wraps up the following apps only for consistent trending: Woolworths (Mobile App), Coles (Mobile App), HelloFresh (Mobile App), ALDI Australia (Mobile App), Audience (000s)
12 Source: Ipsos iris Online Audience Measurement Service, Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce selected categories s with apps as of Jul'24, *Audience affinity index & composition
13 Source: Ipsos iris Online Audience Measurement Service, Jul 2023 to Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Brand Group, Retail & Commerce category, Grocery/Supermarket sub-category, Audience reach %, Audience 000s, YOY Audience 000s % change /*Pi <40K / HHI <60K/ ^PI or HHI 100k+
14 Source: Ipsos iris Online Audience Measurement Service, Jul 23 to Jul 24 24, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce Category, Grocery/Supermarket sub-category (Top 4 apps only included), Audience 000s, YOY Audience % change
15 Source: Ipsos iris Online Audience Measurement Service, Jul 23 to Jul 24 24, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce Category, Grocery/Supermarket sub-category (Top 4 apps only included), Ave Mins PP
16 Source: Ipsos iris Online Audience Measurement Service, Jul 2023 vs. Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Retail & Commerce, Grocery/Supermarket sub-category, Audience 000s, Exclusive %, Cross-use % (WW, Coles, Aldi, Hello Fresh exclusivity mix)
17 Source: Ipsos iris Online Audience Measurement Service, Jul'24, People 14+, PC/laptop/smartphone/tablet, Text only, Brand, Fashion, Style, Beauty sub-category, Audience Share % (of total category - top 10 listed only)
18 Source: Ipsos iris Online Audience Measurement Service, Jul 23 to Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Brands, Fashion, Style, Beauty sub-category, Share of Total Mins
19 Source: Ipsos iris Online Audience Measurement Service, Jul 2023 vs. Jul 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Brand, Retail & Commerce category, Fashion, Style, Beauty sub-category, Audience 000s
20 Source: Ipsos iris Online Audience Measurement Service, Jul 2023 vs. Jul 2024, People 18-39, PC/laptop/smartphone/tablet, Text only, Fashion, Style, Beauty sub-category, Cross-use V% Cosmetics and Makeup brands used for YOY consistency > Premium = Mecca, Sephora vs. Budget = Priceline, Chemist Warehouse Fashion brands used for YOY consistency > Premium = Chanel, Hermes, Louis Vuitton, Dior vs, Budget = Shein, The Iconic, Uniqlo, Cotton On, H&M, Depop, Asos, Noni B, Katies
21 Source: Ipsos iris Online Audience Measurement Service, Jul 2024 vs. Jul 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Retail & Commerce Category, Department, Discount Store or Multi-category sub-category, Brand group, Audience (000s)

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