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ROY MORGAN

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Customer numbers continue to soar for Amazon, SHEIN and Temu while eBay and Kogan trend downwards

New data from Roy Morgan on shopping behaviour and experience in Australia reveals the 'new age' of online marketplaces continue to grow in customers, while traditional online marketplaces have experienced declines in both customers and frequency of shopping.

All three online marketplaces saw increases in the number of Australians who shopped with them at least once in the 12 months to June 2026 compared to the previous 12-month period:

- Amazon had 9.5 million Australian shoppers (up by 728,000 year-on-year);
- Temu had 5.1 million Australian shoppers (up by 371,000 year-on-year);
- Shein had 3 million Australian shoppers (up by 433,000 year-on-year)

In contrast, legacy online marketplace platforms like eBay and Kogan are losing shoppers as they struggle to compete with global eCommerce marketplaces placing heavy emphasis on low prices. In the 12 months to June 2026:

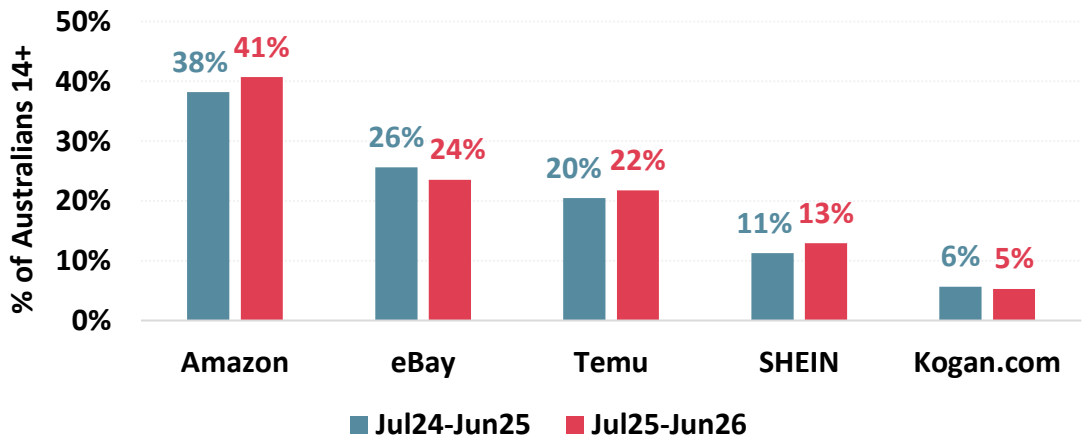
- eBay had 5.9 million Australian shoppers (down by 389,000 year-on-year);
- Kogan.com had 1.2 million Australian shoppers (down by 58,000 year-on-year);

Shopper incidence by retailers (in the last 12 months)

Looking at the proportion of Australians who shopped with each retailer year-on-year further highlights this shift in online shopping behaviour. Shopper incidence for eBay and Kogan.com declined by 2% points and 1% point respectively from the 12-months to July 2025 to the 12 months to 2026, indicating a shrinking customer footprint.

Conversely, Amazon recorded a significant 3% points increase in shopper incidence during the same period, reflecting a sustained period of customer acquisition and growing relevance within Australia's online retail landscape. Temu and Shein also continued to expand their reach, both seeing shopper incidence increase by 2% points in the 12-months to June 2026.

Retailer Incidence in the Last 12 months - Year-on-Year Comparison



Source: *Roy Morgan Single Source Survey; Jul24-Jun25 [n=67,653]; Jul25-Jun26 [n=59,959]* ***Base:*** *All Australians 14+.* ***Question:*** *Which stores have you shopped at in the last 12 months?*

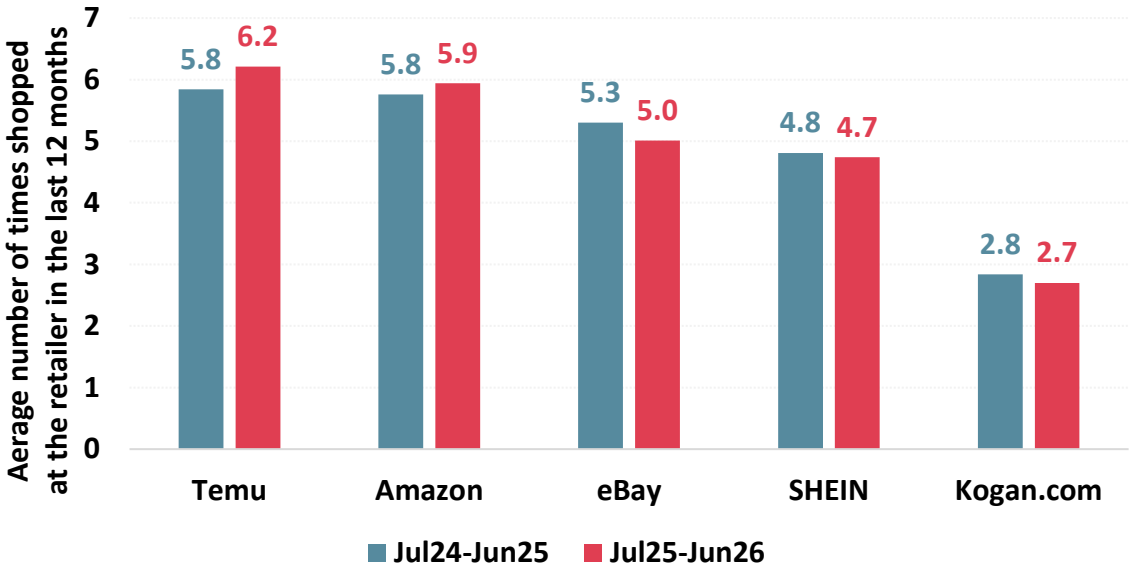
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What about frequency?

Growth in customer numbers is only part of the story. Looking at average shopping frequency over the past 12 months shows that Amazon and Temu have also been successful in encouraging repeat engagement, with shoppers purchasing from each retailer approximately 6 times on average in the 12 months to 2026.

Average Retailer Frequency in the last 12 months - Year-on-Year Comparison



Source: *Roy Morgan Single Source Survey; Jul24-Jun25 [n=67,653]; Jul25-Jun26 [n=59,959]* ***Base:*** *All Australians 14+.* ***Question:*** *How many times have you shopped [at retailer] in the last 12 months?*

Meanwhile, eBay's average shopping frequency has declined year-on-year, alongside a reduction in shopper numbers. This suggests that consumers are not only moving away from the platform, but those who remain are shopping less often than they once did.

Together, these trends point to a broader shift in online retail behaviour, with Australian shoppers increasingly gravitating towards marketplaces that offer greater convenience, competitive prices and a product assortment that continues to expand.

Roy Morgan's CEO, Michele Levine, says:

> *"Global marketplaces such as Amazon, Temu and Shein have rapidly expanded their presence in Australia by combining extensive product choice with aggressive pricing strategies and increasingly sophisticated fulfilment networks.*
>
> *"Amazon is no longer just a disrupter. It's now part of the establishment. With 9.5 million Australians shopping at Amazon, 5.1 million shopping at Temu and 3 million shopping at Shein, these marketplaces have become one of the reference points shoppers use to judge price, range, convenience and membership value.*
>
> *"The news today that 188-year-old Australian department store icon David Jones has entered administration is a clear signal that the competitive pressures in the retail industry brought by new online players continue to intensify.*
>
> *"At the same time, online marketplaces such as eBay and Kogan.com face growing competition from these global players. While these retailers retain sizeable customer bases, their declining reach and frequency suggest they are finding it increasingly difficult to maintain shopper engagement as consumers consolidate spending with marketplaces that offer broader selection, faster delivery and more frequent promotions.*

"These results further highlight that the battle for online retail growth is about attracting new shoppers, increasing shopping frequency, and becoming regular part of consumers' purchasing journeys. Amazon, is a standout for clearly growing its customer base while also encouraging more frequent usage."

These are the latest insights from the Roy Morgan Single Source Retail Information: To understand this shift in consumer shopping behaviour, contact Roy Morgan Research.

For comments or more information about Roy Morgan's Retail data and insights please contact:

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About Roy Morgan

Roy Morgan is Australia's largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 80 years' experience collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2