2026

commerce and discovery report

shopper trends transforming commerce and retail marketing

australia | wave 6 | new zealand | wave 3

Pureprofile

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welcome to wave 6

In partnership with Pureprofile, IAB Australia is pleased to present the latest Commerce and Discovery Report. Now in its sixth wave in Australia and third in New Zealand, this annual study explores how consumers discover, research and buy products, while examining the value exchange between shoppers and retailers in an increasingly data-driven world.

This year's research was conducted against a backdrop of ongoing cost-of-living pressures and the rapid adoption of AI in everyday shopping. Australians are still under pressure, and that is changing the way they shop. They are more careful and considered, looking both for value and confidence before they spend. They are researching and comparing more and validating information across more sources.

We hope these findings help marketers, retailers and publishers understand how shopping behaviours are evolving, where attention, trust and value are shifting, and how to meet consumers across an ever-widening mix of touchpoints

Gai Le Roy
CEO
IAB Australia

Pureprofile is proud to partner with IAB Australia for the sixth wave of the Commerce and Discovery Report, exploring how consumers are navigating a fast-changing retail landscape.

Despite ongoing cost-of-living pressures, consumers are becoming more deliberate and informed, with online shopping now embedded in everyday behaviour. However, the path to purchase is increasingly non-linear, with shoppers moving across multiple channels to discover, research and compare products before buying.

Search and retailer sites remain central, but shoppers are also turning to reviews, social media, creator content, loyalty programs and emerging AI tools to build confidence and reduce uncertainty. Trust, transparency and credibility continue to play a key role as new shopping experiences emerge.

This year’s report highlights the growing need for consistent, value-driven experiences across channels, balancing convenience and personalisation with rising expectations around privacy and authenticity.

Martin Filz
CEO
Pureprofile

executive summary

Against a backdrop of ongoing cost-of-living pressures, consumers remain deliberate and value-conscious, spending more time researching purchases and seeking greater confidence before they buy. At the same time, the ways consumers discover products have expanded rapidly, with AI-powered tools, creators, social platforms and retail media adding to an already complex mix of sources. For brands and retailers, success increasingly depends on demonstrating value, building trust and maintaining a visible presence wherever consumers research and shop.

Search remains a dominant source of product and brand discovery and research, but the experience is evolving beyond traditional blue links to reviews, images and AI-generated answers. While AI is becoming an increasingly important part of the shopping toolkit, it complements rather than replaces existing behaviours. Consumers continue to verify AI-generated recommendations through retailer websites, brand websites, reviews and other trusted sources, highlighting that confidence and accuracy remain essential throughout the path to purchase.

The findings reinforce the importance of a connected, multi-channel marketing strategy. Different channels play distinct roles across discovery, research, comparison and purchase, requiring brands to deliver consistent information, compelling content and coordinated media investments across paid, owned and earned touchpoints. As discovery journeys become more fragmented, maintaining visibility across both traditional and emerging environments will be critical.

Influencers and creators continue to shape product discovery, however, influence is driven less by audience size than by authenticity, expertise and alignment with the brand. The most effective creator partnerships are those that build trust and reinforce confidence in purchase decisions.

Interest in frictionless commerce experiences is emerging, with many consumers attracted to the convenience of discovering and purchasing products without leaving the platform they are using. While shoppable media and shoppable TV features show promise, concerns around payment security, privacy and product quality remain barriers to wider adoption.

The report also highlights the strategic importance of retailer-owned assets within the evolving commerce ecosystem. Retailer websites, apps, loyalty programs are relied on for product research, personalised offers and purchase decisions, while providing brands with increasingly valuable opportunities to engage high-intent shoppers through retail media. Loyalty programs continue to influence where consumers shop and increase willingness to share data, but consumers expect a fair value exchange. Discounts, member pricing, free delivery and cashback remain the strongest incentives, reinforcing that sustained trust will depend on transparency, relevance and delivering tangible benefits in return for consumers' data and attention.

methodology

online shopping behaviour

shopper motivations

product and brand discovery

- sources of discovery
- search
- ai
- creators and influencers
- shoppable media

retail marketing and data exchange

01. methodology

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methodology

1

objective

To understand how evolving consumer behaviours and expectations are shaping shopping and commerce in Australia and New Zealand — with a focus on shopper motivations, discovery channels, AI, loyalty engagement and attitudes toward data sharing.

2

sample

A nationally representative sample of 1,079 Australians aged 18–70 who have shopped online at least once in the last 12 months.
A nationally representative sample of 877 New Zealanders aged 18–70 who have shopped online at least once in the last 12 months.

3

study

Australia: Wave 6 annual online survey
New Zealand: Wave 3 annual online survey
Reports for previous waves (2021–2025) are available to download from the IAB Australia website.

methodology

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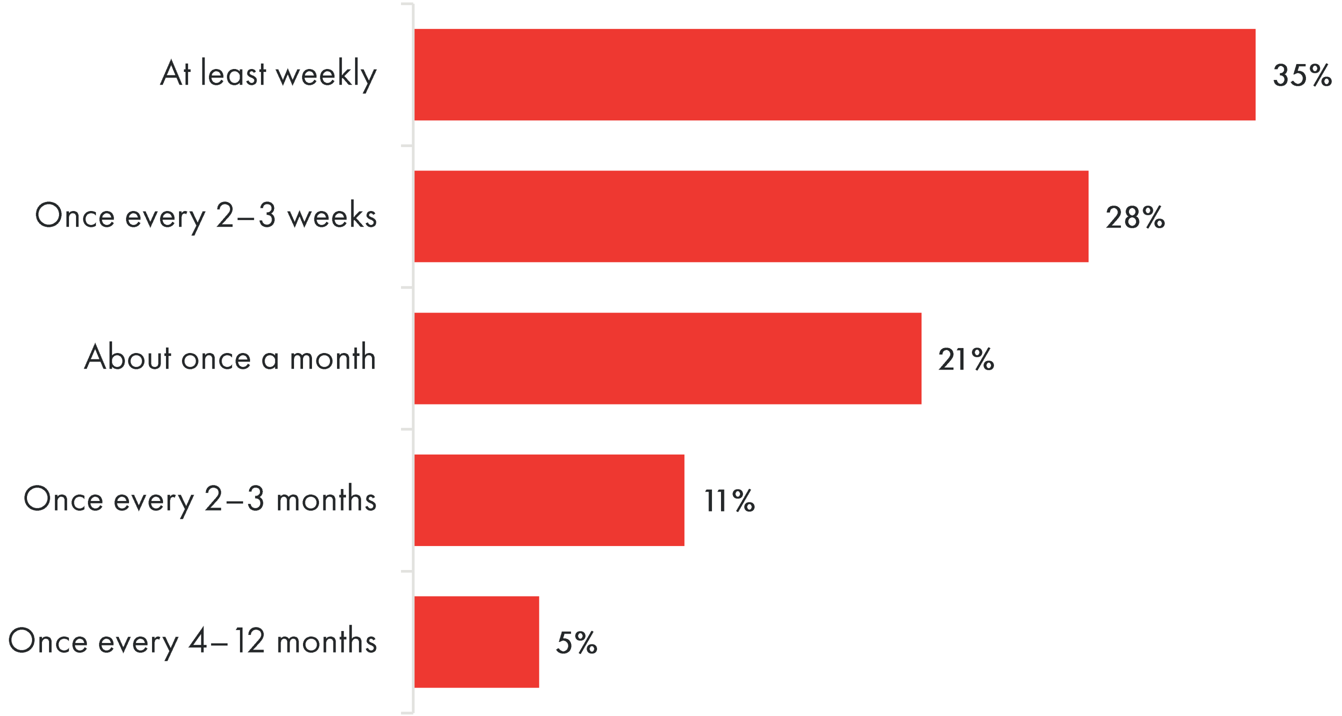
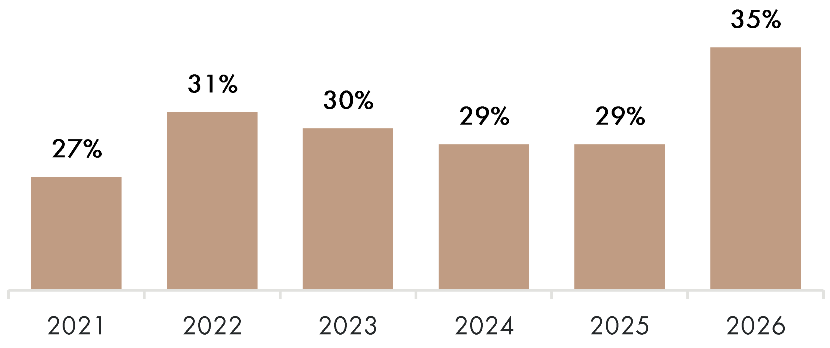
02. online shopping behaviour

frequency of online shopping reaches a new high

More than a third of Australian online shoppers now shop online at least weekly, up 6% pts on year prior.



% of online shoppers that are weekly shoppers, 2021–2026



84%

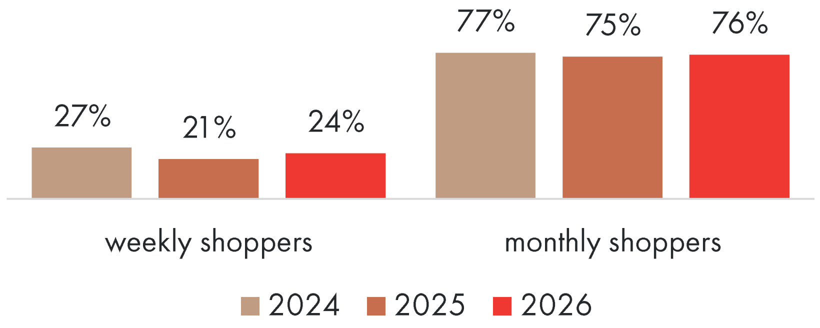
of online shoppers shop online at least monthly — online shopping is now a routine habit.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How often do you shop online?

online shopping is a weekly habit for many

Frequency of online shopping in New Zealand is stable at around a quarter of online shoppers buying online at least weekly, and three-quarters shopping online at least monthly.

% of online shoppers that are weekly and monthly shoppers, 2024–2026



76%

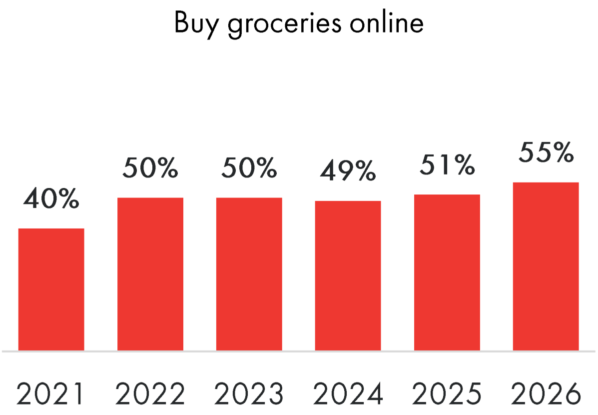
of online shoppers shop online at least monthly — online shopping is now a routine habit.

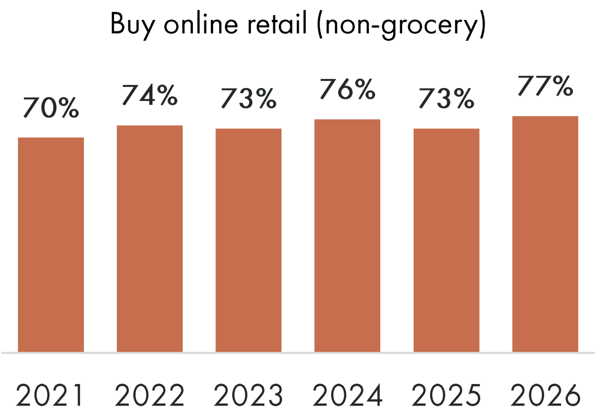
Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How often do you shop online?

grocery is the fastest-growing online basket

The proportion of online shoppers buying groceries online in Australia has increased over the last 5 years, while non-grocery retail remains the broader habit.

% of australian online shoppers buying at least monthly, by category (2021–2026)





+15 pts

growth in % of online shoppers buying groceries online at least monthly since 2021 (40% → 55%)

what's behind it

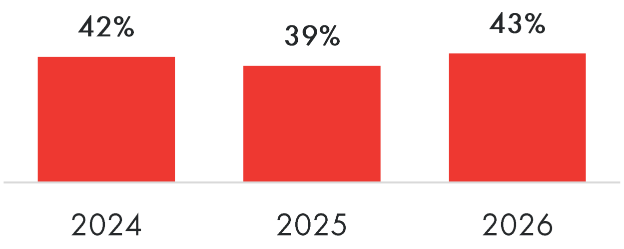
Grocery has shifted from a trial behaviour to a recurring fixture with 26% of online shoppers buying groceries online weekly and 55% at least monthly in 2026. Only 26% of online shoppers have never purchase groceries online in 2026.

online grocery shopping is emerging in new zealand

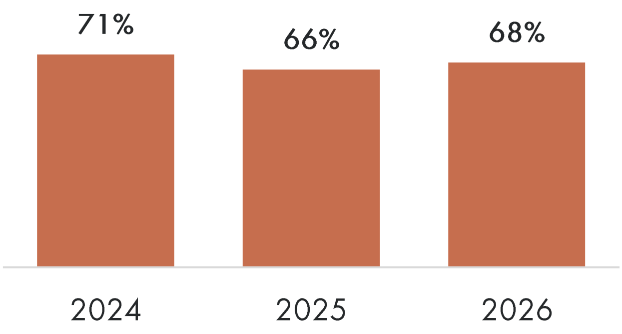
Non-grocery retail is the broader online habit in New Zealand, while online grocery is still building regular frequency.

% of new zealand online shoppers buying at least monthly, by category (2024–2026)

Buy groceries online



Buy online retail (non- grocery)



68%

of NZ online shoppers buy retail (non-grocery) online at least monthly.

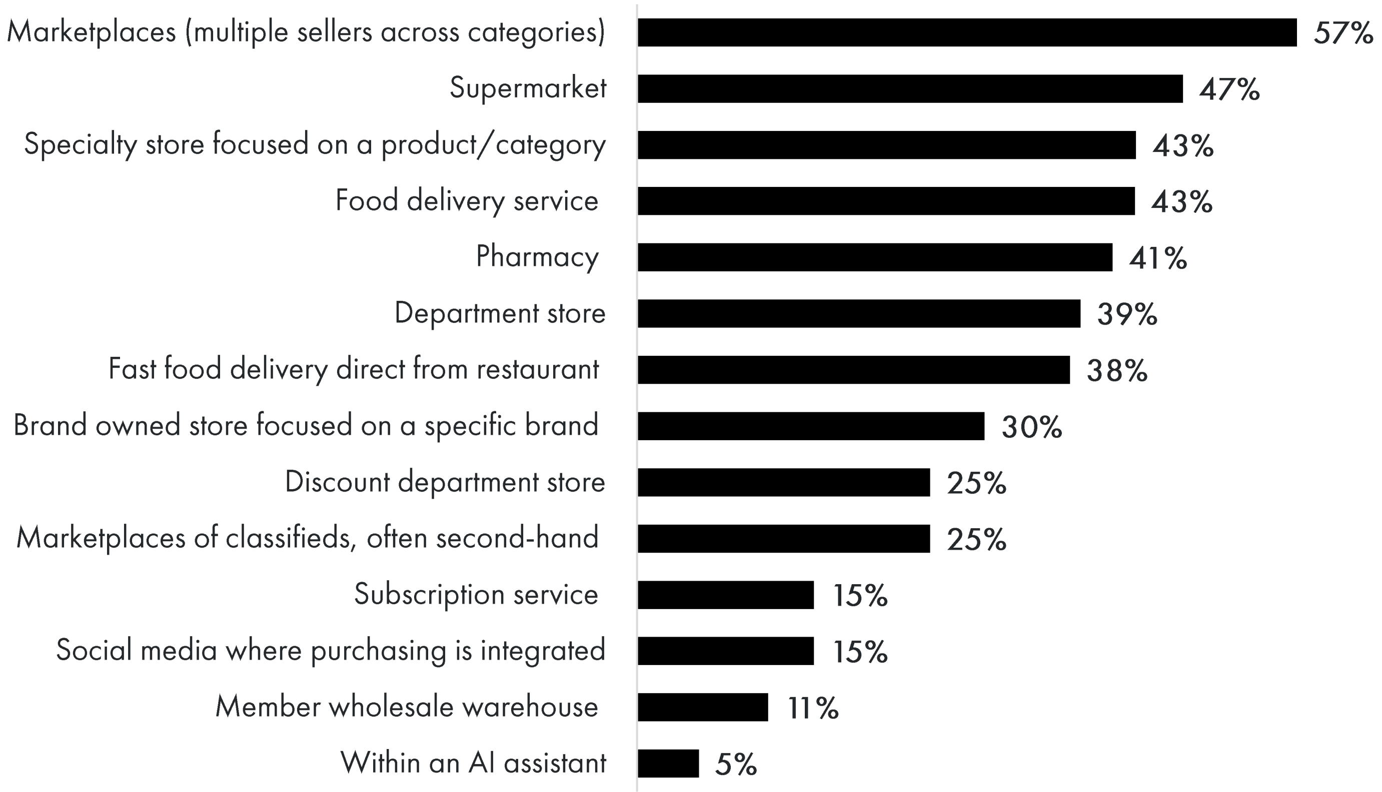
what's behind it

Online grocery is less embedded than in Australia. 18% of NZ online shoppers buy groceries online weekly and 43% at least monthly, while 31% have never bought groceries online.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How often do you shop online for the following products? - Buy groceries online; Buy online retail (non- grocery)

where australians buy online

Marketplaces of multiple sellers across categories (e.g. Amazon, Temu) continue to lead the online retailer types Australian online shoppers have purchased from in the last 12 months.



58%

of online shoppers aged 30-49 have purchased from an online supermarket in the last 12 months, compared to 47% of all online shoppers.

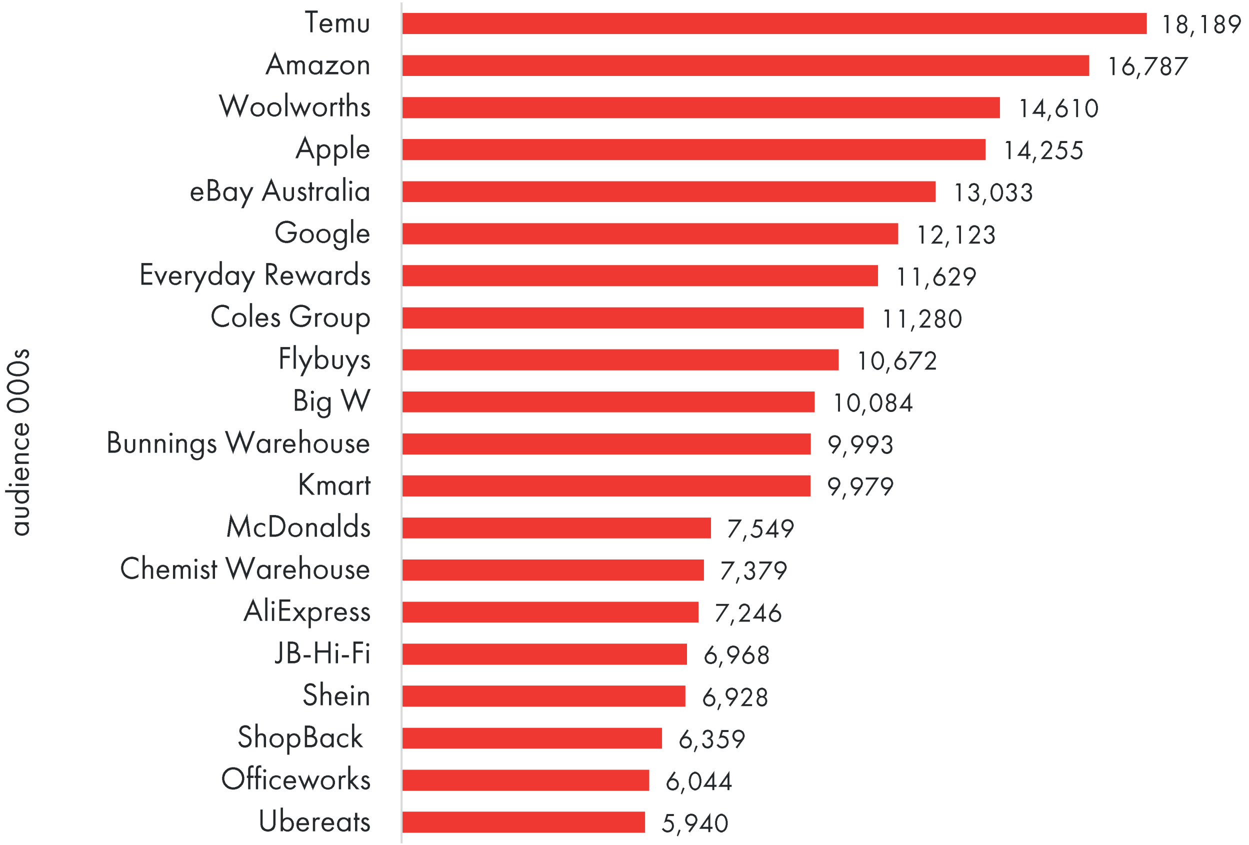
food convenience driving younger online shoppers

58% of online shoppers aged 18-39 have purchased from a food delivery service (eg Ubereats, Doordash), compared to 31% of online shoppers aged 40-70.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Which of the following types of retailers have you purchased from online in the last 12 months?

top online retail and commerce brands australians look at

The chart below shows the top 20 online retail and commerce brands (websites and apps) visited by Australians in May 2026 (audience 000s).



22.1 million

australians visited an online retail or commerce brand in May 2026.

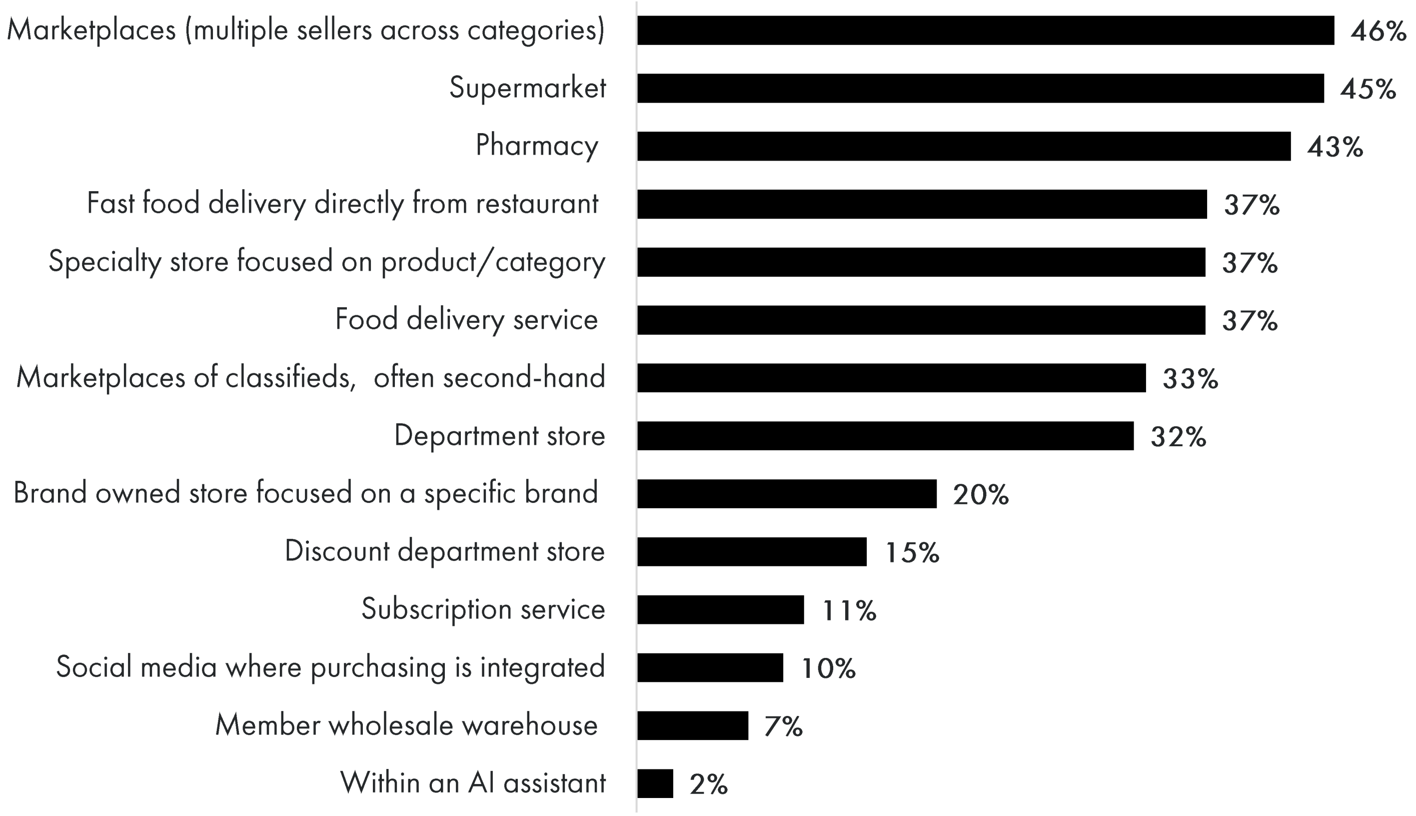
total time spent on supermarket websites and apps at its highest in May 2026

17.5 million Australians visited an online supermarket in May 2026. Audience grew faster than the online population at 4% year on year (May 25 v May 26) and total time spent on supermarket websites and apps grew a significant 35% year on year.

Source: Ipsos iris Online Audience Measurement Service May 2026, age 14+, PC/laptop/smartphone/tablet, audience (000s), Retail and Commerce Category, Top 20 Brand Groups and Ipsos iris Online Audience Measurement Service May 2026 vs May 2025, age 14+, PC/laptop/smartphone/tablet, audience (000s), Total time, Grocery/Supermarket subcategory

where new zealanders buy online

Marketplaces hosting multiple sellers continue to lead the online retailer types New Zealand online shoppers have purchased from in the last 12 months — narrowly ahead of supermarkets and pharmacies.



50%

of female online shoppers have purchased from an online pharmacy in the last 12 months, the leading online retailer type for NZ women.

food convenience driving younger online shoppers

50% of online shoppers aged 18-39 have purchased from a food delivery service (eg Ubereats, Doordash), compared to 28% of online shoppers aged 40-70.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - Which of the following types of retailers have you purchased from online in the last 12 months?

methodology

online shopping behaviour

shopper motivations

product and brand discovery
- sources of discovery
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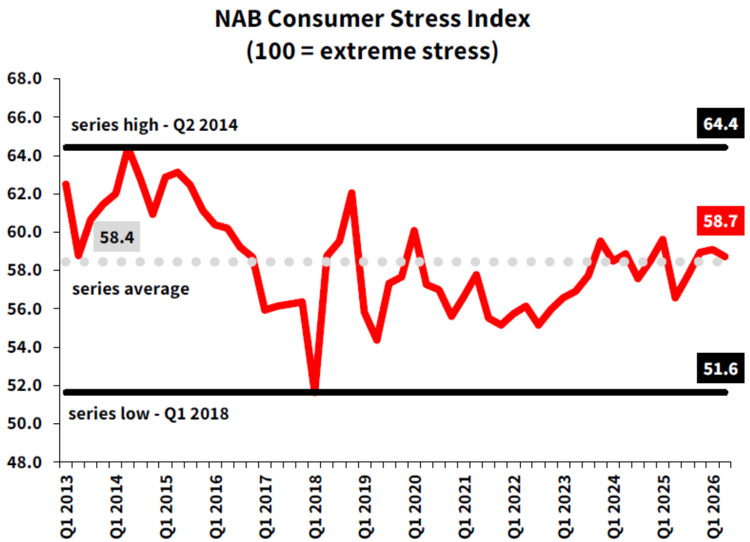
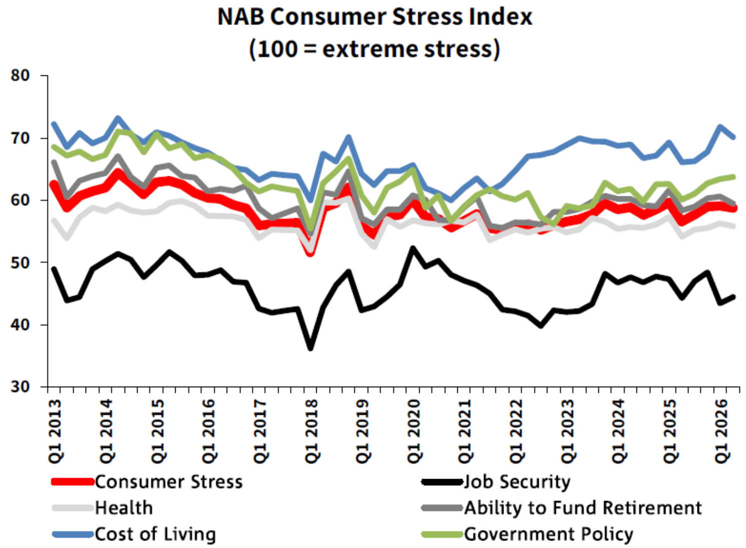
retail marketing and data exchange

03. shopper motivations

cost-of-living pressure remains persistent

The NAB Consumer Stress Index indicates consumer stress remains above its long-run average, and many households continue to report pressure on real household budgets as day-to-day living costs absorb a larger share of income.





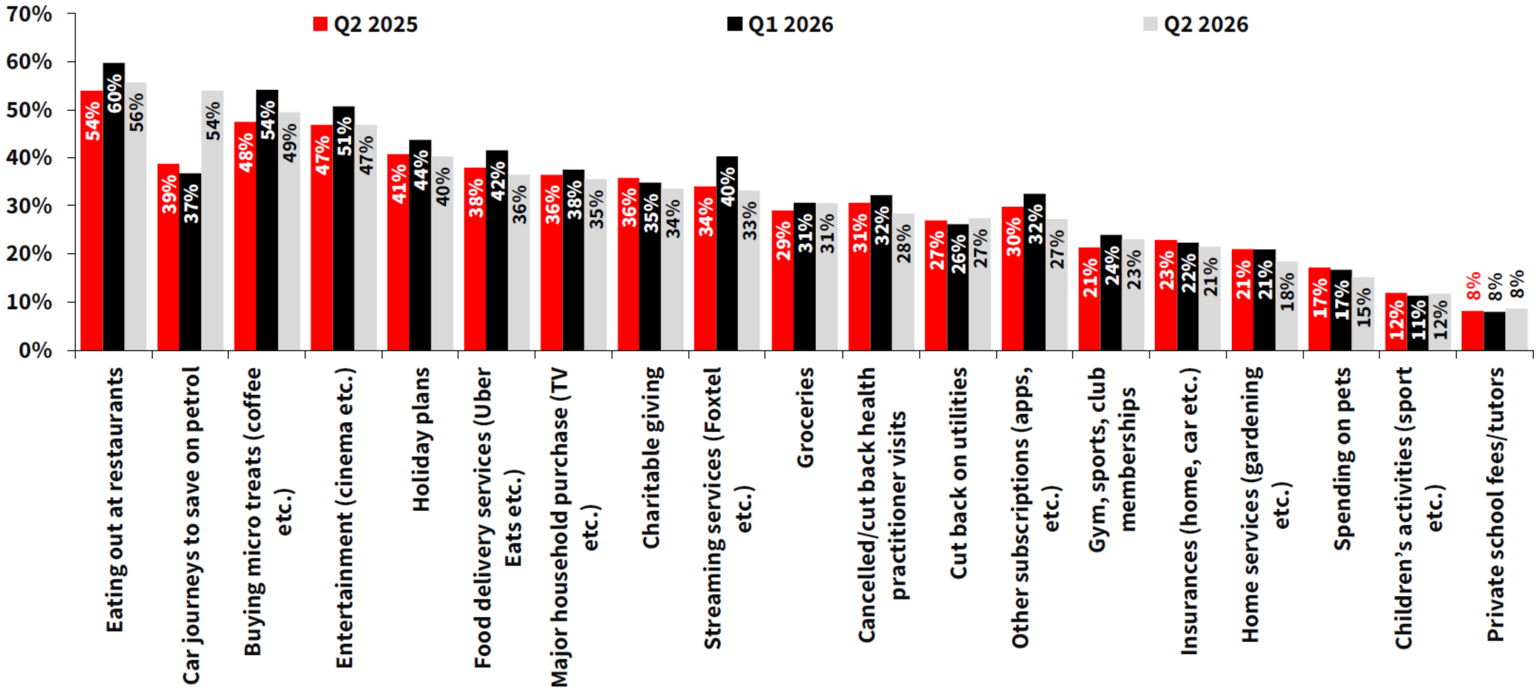
Cost-of-living pressure remains persistent, continuing to constrain household spending, with 8 in 10 Australians reporting higher living costs, 54% cutting car use and 28% cutting health visits. Savings are being redirected to essentials and financial buffers, while price-driven switching remains widespread.

- NAB consumer sentiment survey

Source: NAB Consumer Sentiment Survey Q2 2026

cost of living pressures continue to reshape spending

% cut, cancelled or delayed spending in last 3 months due to cost-of-living pressures



discretionary demand remains fragile

Cost of living pressures continue to reshape household spending behaviour with selective spend adjustments.

The sharpest shift in Q2 2026 was in transport, where the share of consumers reducing car use to save on petrol jumped to 54% from 37% in Q1, highlighting a stronger focus on managing recurring and unavoidable costs.

Savings from cutbacks are being redirected to essentials, savings and offset accounts rather than discretionary purchases, limiting the scope for a near-term rebound in optional spending.

- NAB consumer sentiment survey

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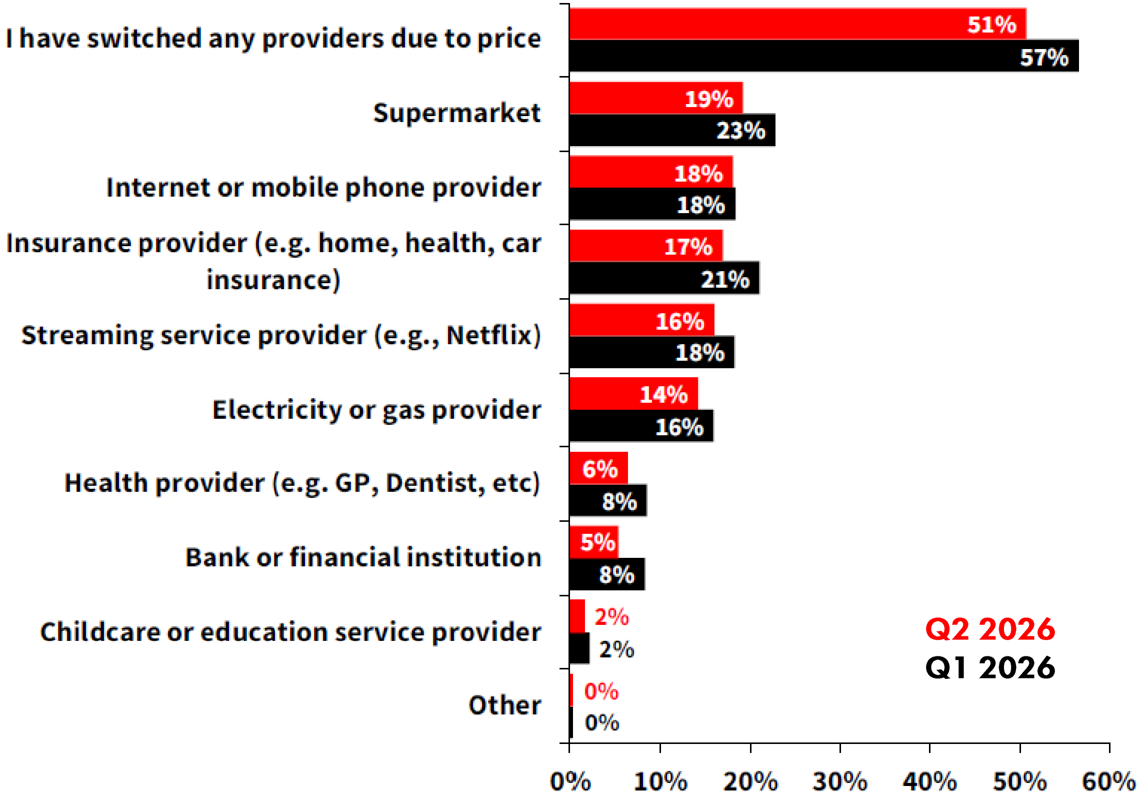
Source: NAB Consumer Sentiment Survey Q2 2026

consumers are switching providers due to price increases

% switched or changed providers because of price increases in the past 12 months



customer retention matters more

51% of consumers have switched providers because of price increases in the last 12 months.

Groceries, utilities and transport are absorbing household budgets, making pricing, promotions and value perception especially important in high-frequency consumer categories.

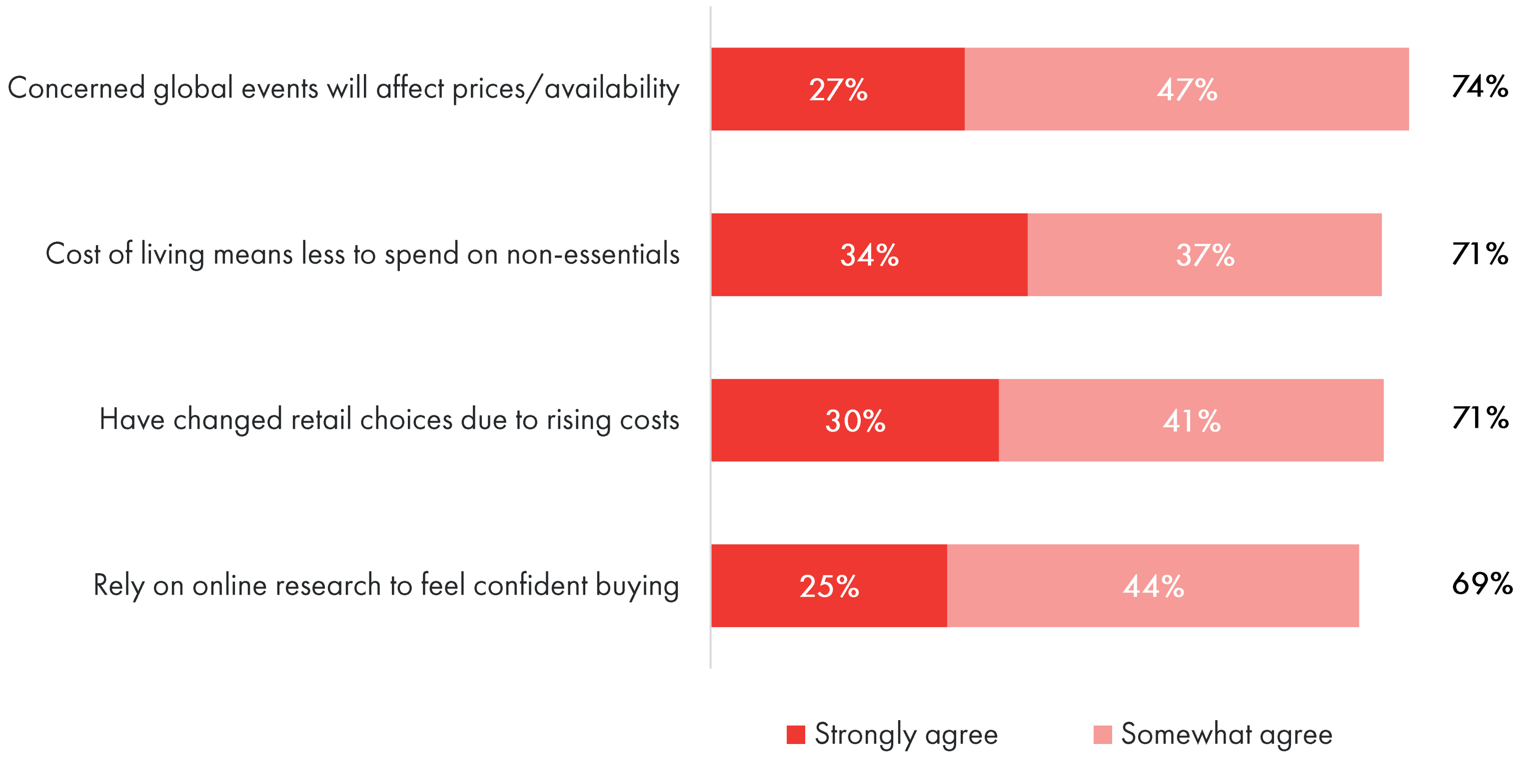
Lower switching in banking and health suggests relationship-led sectors may have greater pricing resilience where trust, convenience and service quality remain strong.

- NAB consumer sentiment survey

Source: NAB Consumer Sentiment Survey Q2 2026

the value-conscious, research-led shopper

Cost-of-living pressure and global uncertainty are reshaping what and how online shoppers buy and most now research before they commit.



71%

have changed their retail choices and spending because of rising costs.

the mindset shift

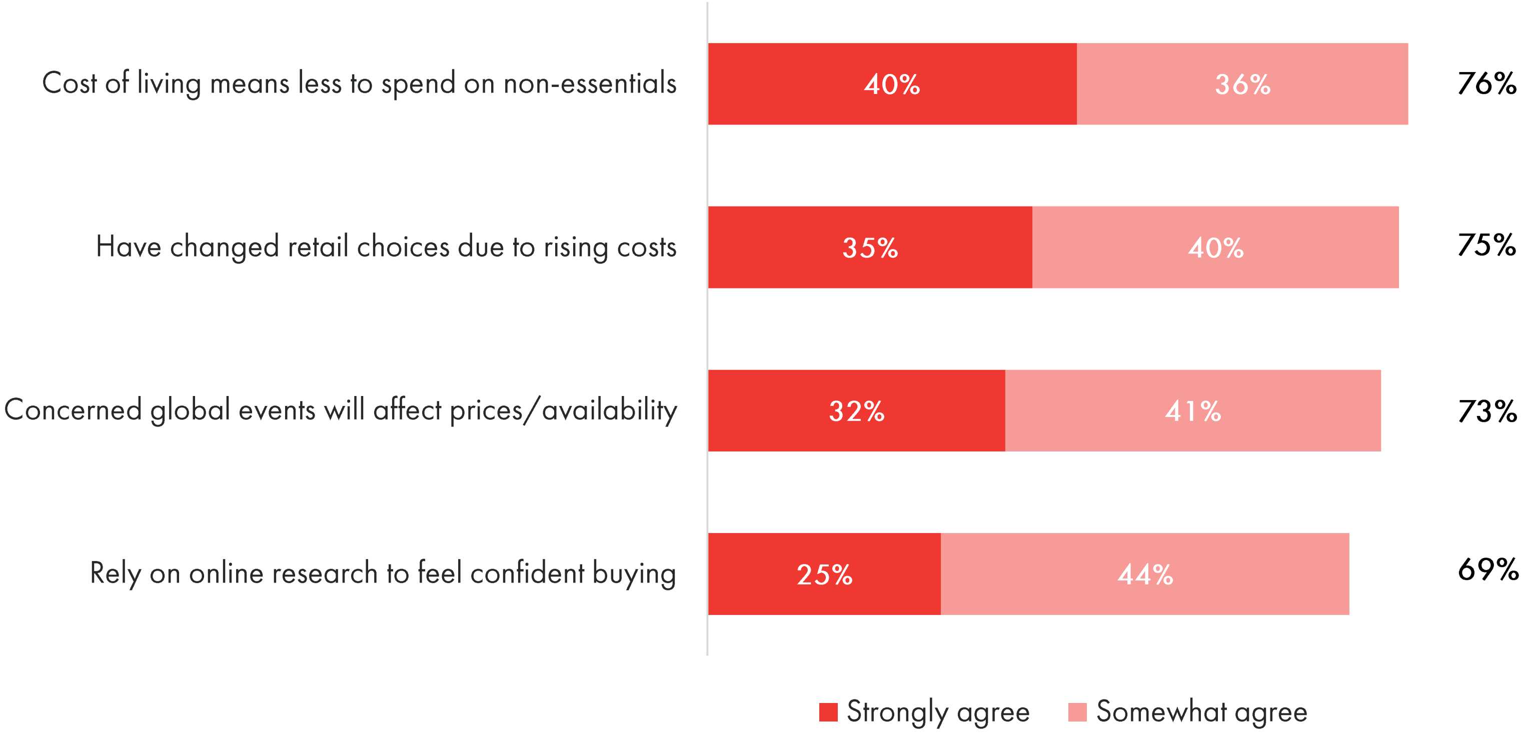
Shoppers are highly value-conscious, changing their retail choices driven by cost. Shoppers are trading up on research and trading down on discretionary spend. Confidence increasingly comes from doing the homework before buying. Brands can compete by demonstrating value and providing information and ways that bolster confidence in shopper decisions.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following?

shopper motivations new zealand

value-conscious and research-led shopper

Cost-of-living pressures are slightly higher in New Zealand than Australia and these pressures are changing retail choices and spending.



75%

have changed their retail choices and spending because of rising costs.

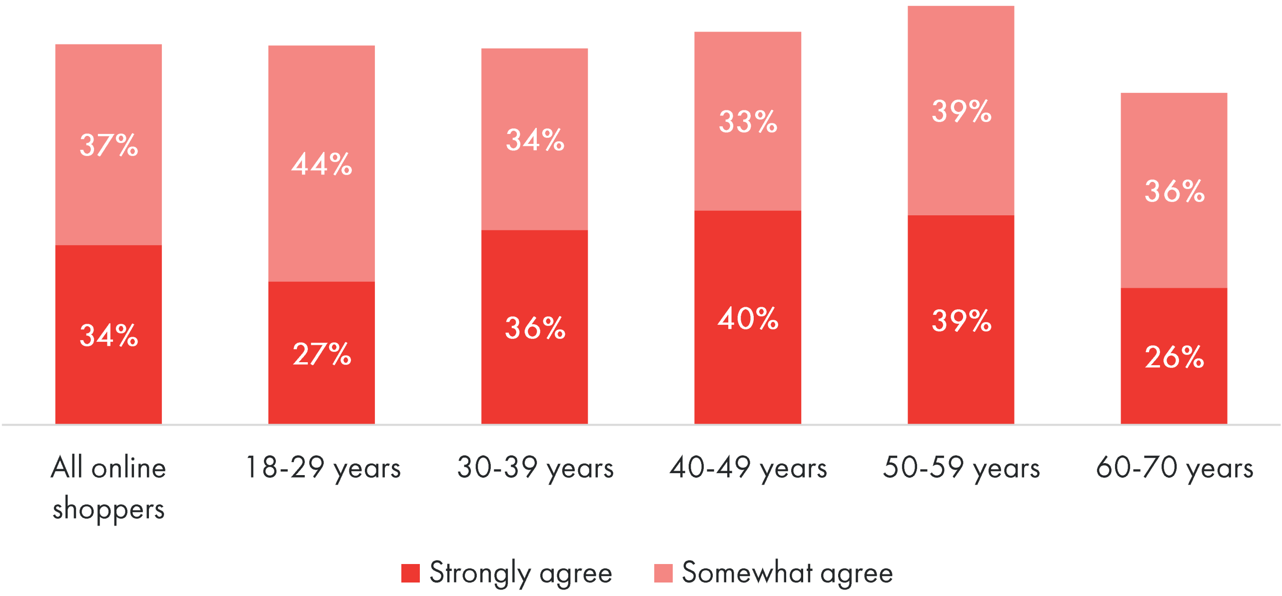
the mindset shift

Shoppers are highly value-conscious, changing their retail choices driven by cost. Shoppers are trading up on research and trading down on discretionary spend. Confidence increasingly comes from doing the homework before buying. Brands can compete by demonstrating value and providing information and ways that bolster confidence in shopper decisions.

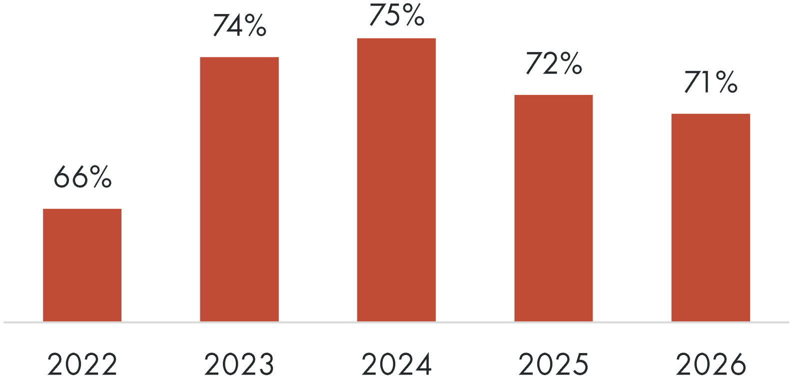
less to spend on non-essentials

Cost of living pressure is most keenly felt by females and those aged 40-59. 41% of female online shoppers strongly agree that cost of living pressures mean less to spend on non-essentials and 40% and online shoppers aged 40-59 strongly agree.

% of online shoppers that agree 'cost of living pressures means less to spend on non-essentials', by age group



% of online shoppers that agree 'cost of living pressures means less to spend on non-essentials', 2022–2026



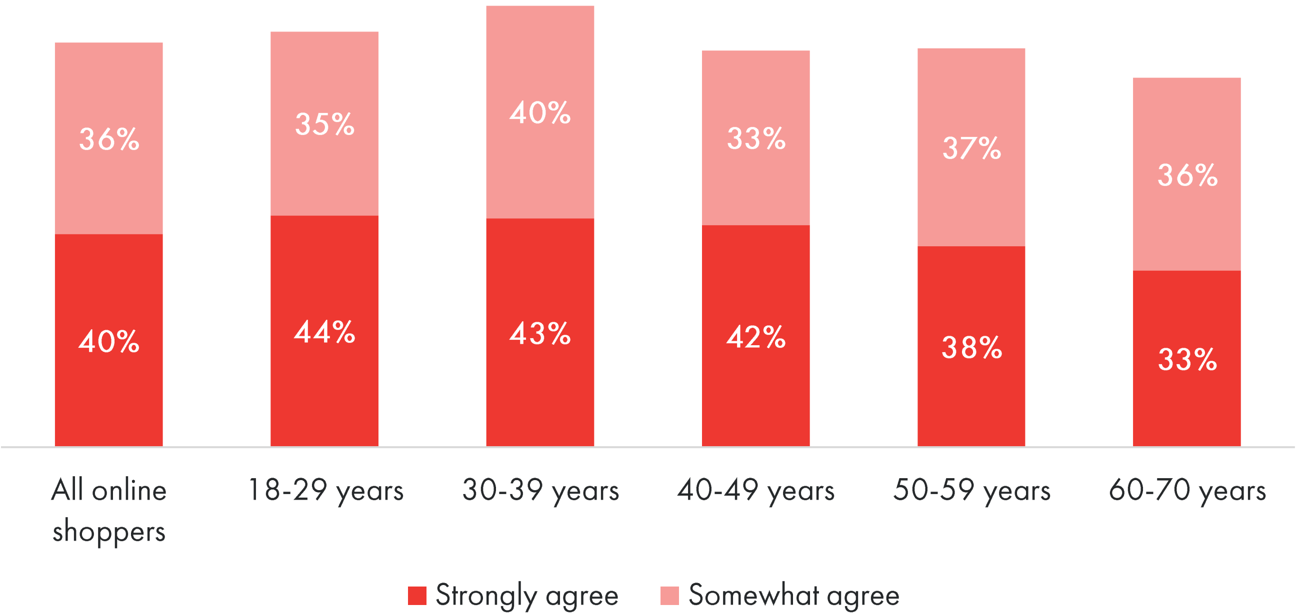
76%

of online shoppers aged 40-59 experience cost of living pressures that mean less to spend on non-essentials.

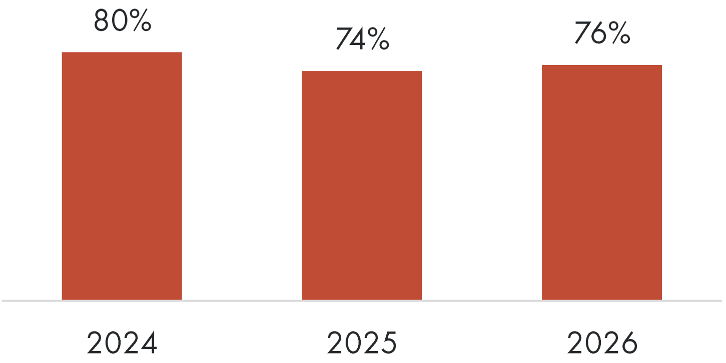
less to spend on non-essentials

Cost of living pressure is impacting spending of females and younger age groups in New Zealand. 46% of female online shoppers strongly agree that cost of living pressures mean less to spend on non-essentials and 43% and online shoppers aged 18-39 strongly agree.

% of online shoppers that agree 'cost of living pressures means less to spend on non-essentials', by age group



% of online shoppers that agree 'cost of living pressures means less to spend on non-essentials', 2022–2026



80%

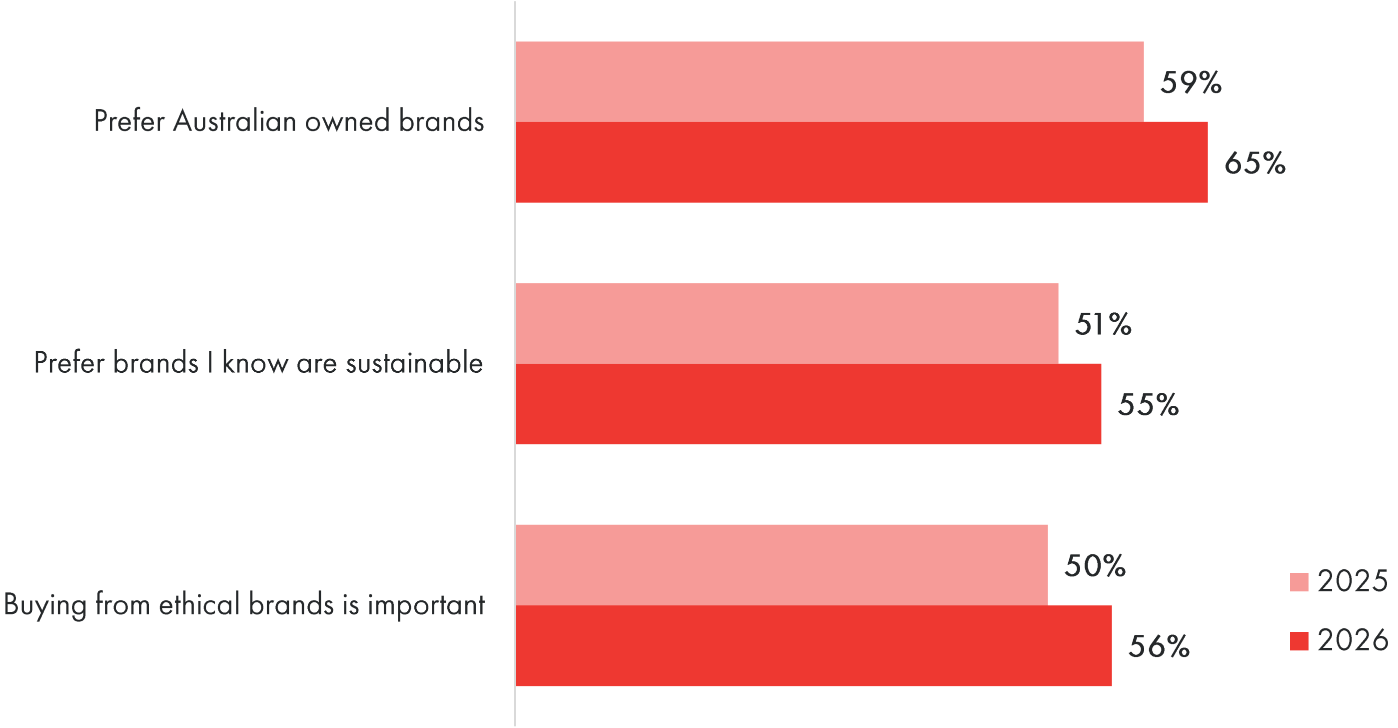
of online shoppers aged 18-39 experience cost of living pressures that mean less to spend on non-essentials.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following?

ethics and provenance still matter

Agreement that ethics, sustainability and local ownership matter has risen year-on-year, even amid budget pressure.

% of online shoppers that agree



65%

of online shoppers agree they prefer to buy Australian-owned brands, up 6% points on 2025. 71% of online shoppers aged 50-70 agree with the sentiment.

values vs. value

While affordability remains a major influence on spending decisions, online shoppers are more conscious of buying Australian-made products and brands.

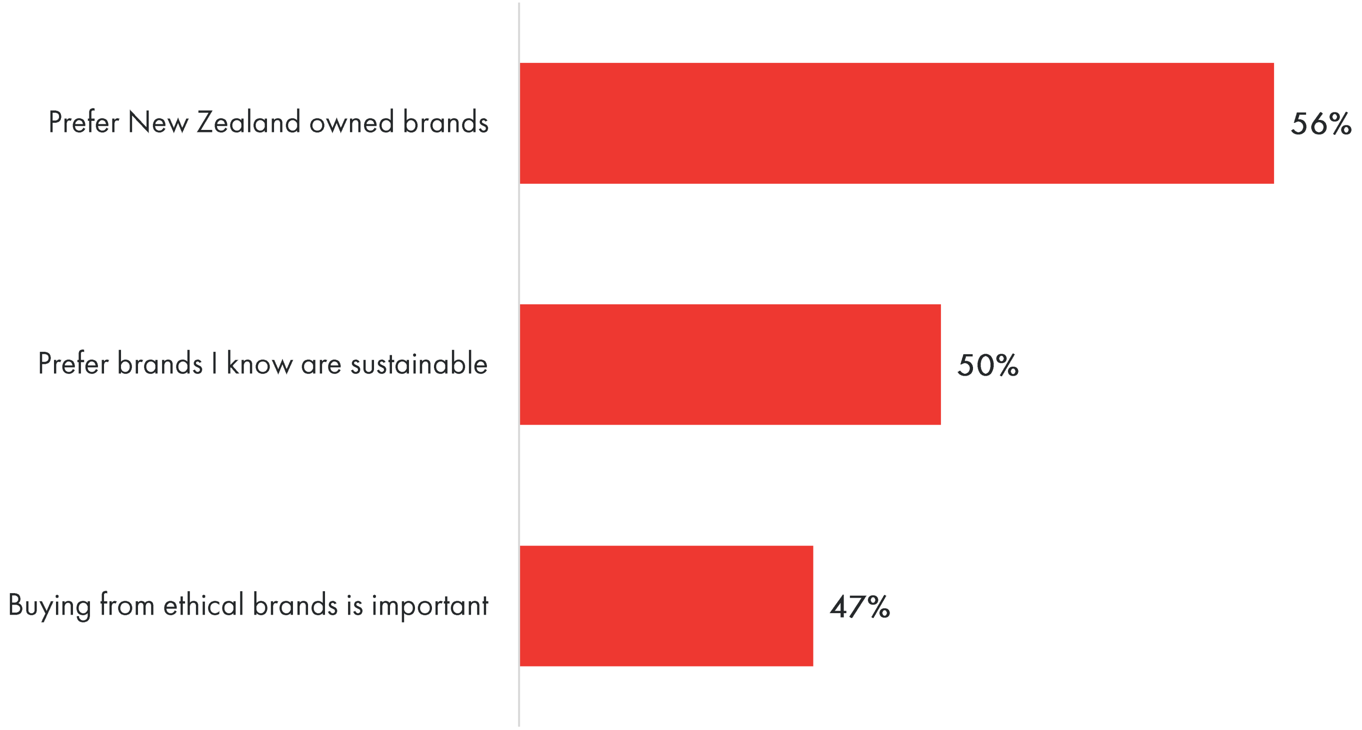
Sentiment towards sustainability has increased year on year, however NAB's Consumer Sentiment Survey in Q2 2026 also found that buying based on climate or sustainability considerations remained weak.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following?

ethics and local provenance matter to many

Even amid budget pressure, ethics, sustainability and local ownership remain meaningful tie-breakers for New Zealand shoppers.

% of online shoppers that agree



56%

of online shoppers agree they prefer to buy New Zealand-owned brands, a sentiment consistently held across all age groups.

values vs. value

While affordability remains a major influence on spending decisions, online shoppers are more conscious of buying New Zealand-made products and brands.

Preference for sustainable brands is highest amongst online shoppers 18-39 (57% agree).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - Thinking about when you shop either online or in person, how much do you agree or disagree with the following?

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04. product & brand discovery

sources used to find and research products and brands

Online shoppers move from discovery to research to comparison — each stage draws on a different mix of sources.

1 Discovery

Where shoppers come across or notice products and brands to buy.

- Physical retail store
- Friends or family
- Online retail store
- Social media
- Broadcast TV
- Search engine
- Online marketplace
- Physical store sales assistant
- Social media contacts & communities
- Online or physical catalogues
- News, lifestyle, entert sites and apps

2 Research

Where shoppers actively search for or research products and brands.

- Search engine
- Online retail store
- Product reviews from consumers
- Physical retail store
- Product reviews from experts
- Online price comparison site
- Online marketplace
- Friends or family
- Social media
- Physical store sales assistant
- Online or physical catalogue
- AI assistant
- Social media contacts & communities

3 Comparison

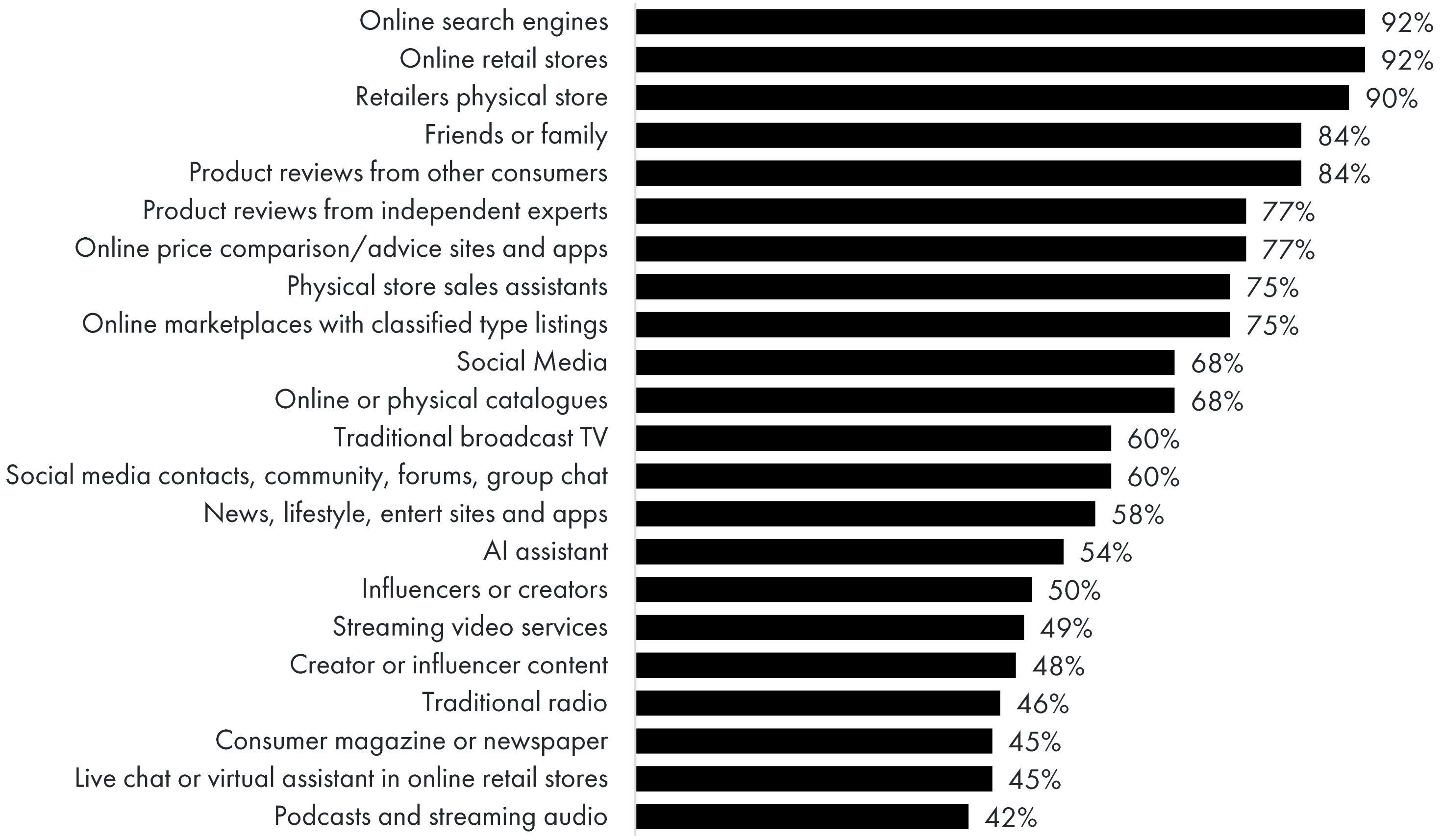
Where shoppers compare specific options when close to buying.

- Online retail store
- Online price comparison site
- Product reviews from consumers
- Physical retail store
- Search engine
- Product reviews from experts
- Physical store sales assistant
- Friends or family
- Online marketplaces
- Online or physical catalogue
- AI assistant

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How do you typically use each of the following ... sources (including the advertising in this content), when discovering or researching products or brands to buy?

search and stores key in finding and researching products

There are a large number and variety of sources typically used to discover, research and compare products to buy.



92%

typically use search or online store to discover, research and compare products to buy.

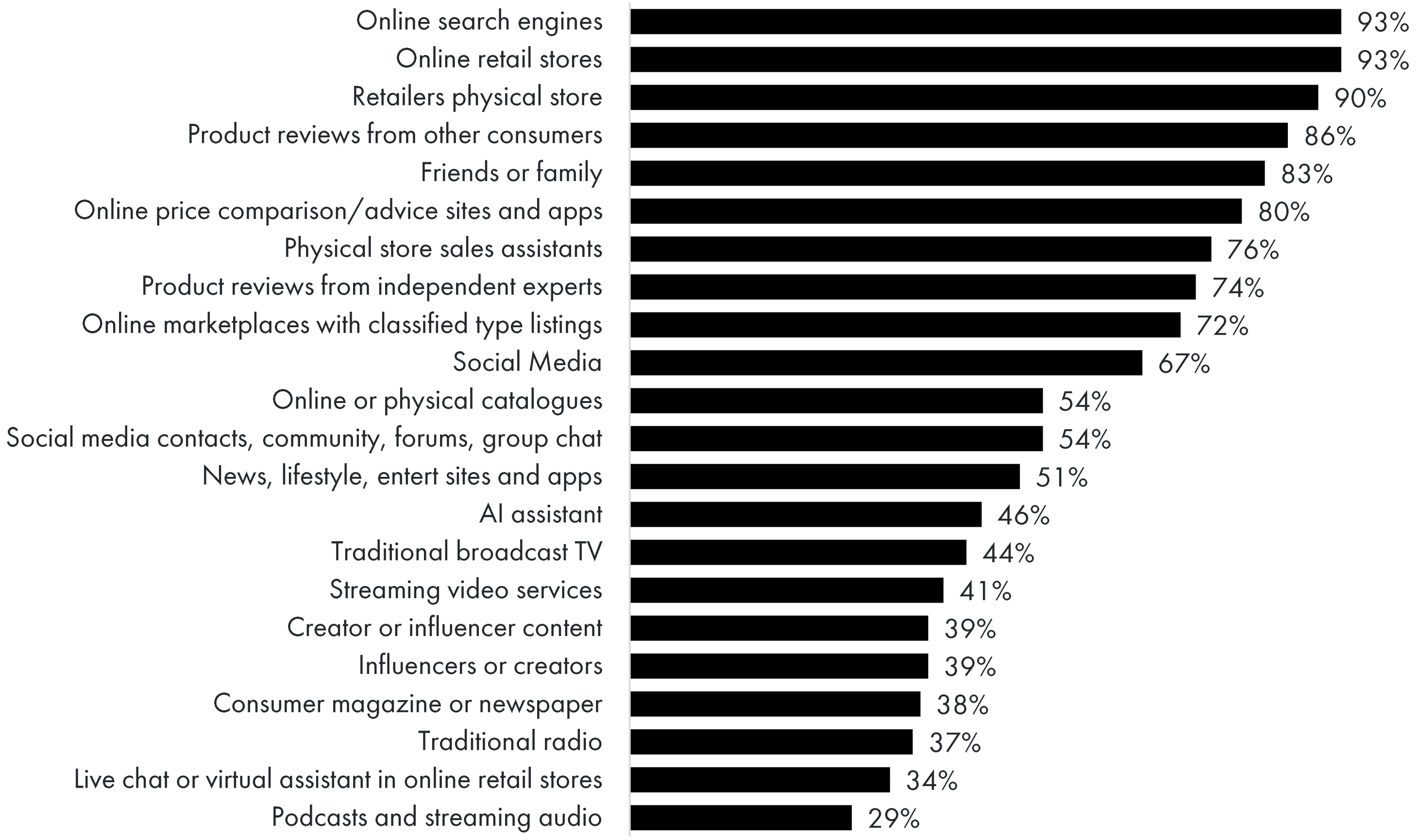
multi-channel benefits

A multi-channel marketing strategy increases reach, reinforces brand messages, captures demand at different stages of decision-making, and delivers proven, stronger business outcomes than relying on a single channel alone.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How do you typically use each of the following ... sources (including the advertising in this content), when discovering or researching products or brands to buy?

search and stores key to finding and researching products

New Zealand shoppers draw on a wide range of sources to discover, research and compare products to buy.



93%

typically use search or online store to discover, research and compare products to buy.

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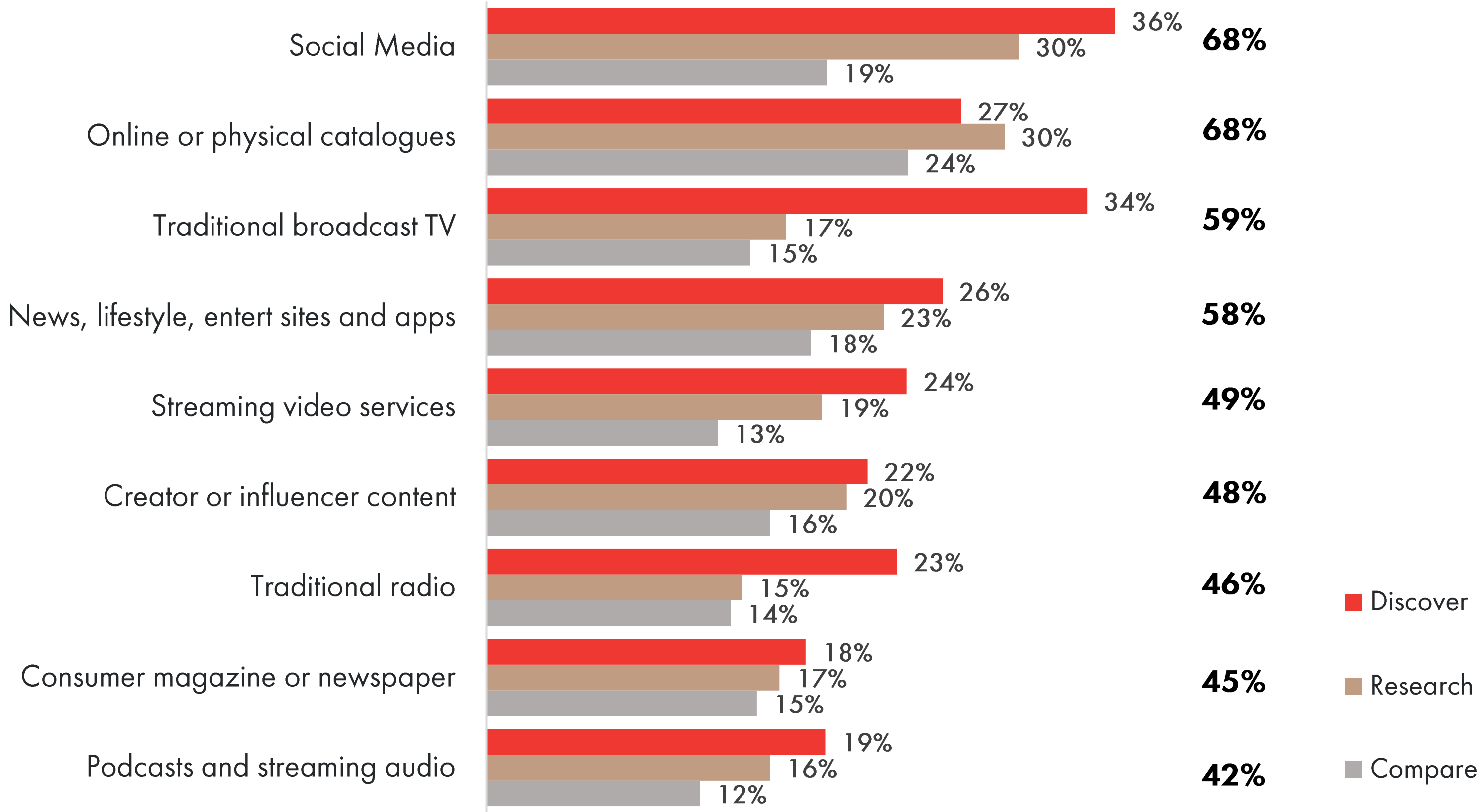
Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How do you typically use each of the following ... sources (including the advertising in this content), when discovering or researching products or brands to buy?

media and content sources are predominantly used for discovery

Amongst media and content sources, social media and broadcast TV lead as sources where online shoppers come across or notice products and brands to buy. Social media and catalogues are key media sources used to research and compare products and brands to buy.



68%

use social media to discover, research or compare products and brands to buy.

heavier usage of social for 18 – 39's

Amongst online shoppers aged 18-39, 88% have used social media and 72% have used creator or influencer content to discover, research or compare products and brands to buy.

18-39s are also more likely to come across brands in News, lifestyle, entertainment websites and apps, streaming video and podcasts/streaming audio.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079

Q - How do you typically use each of the following media and content sources (including the advertising in this content), when discovering or researching products or brands to buy?

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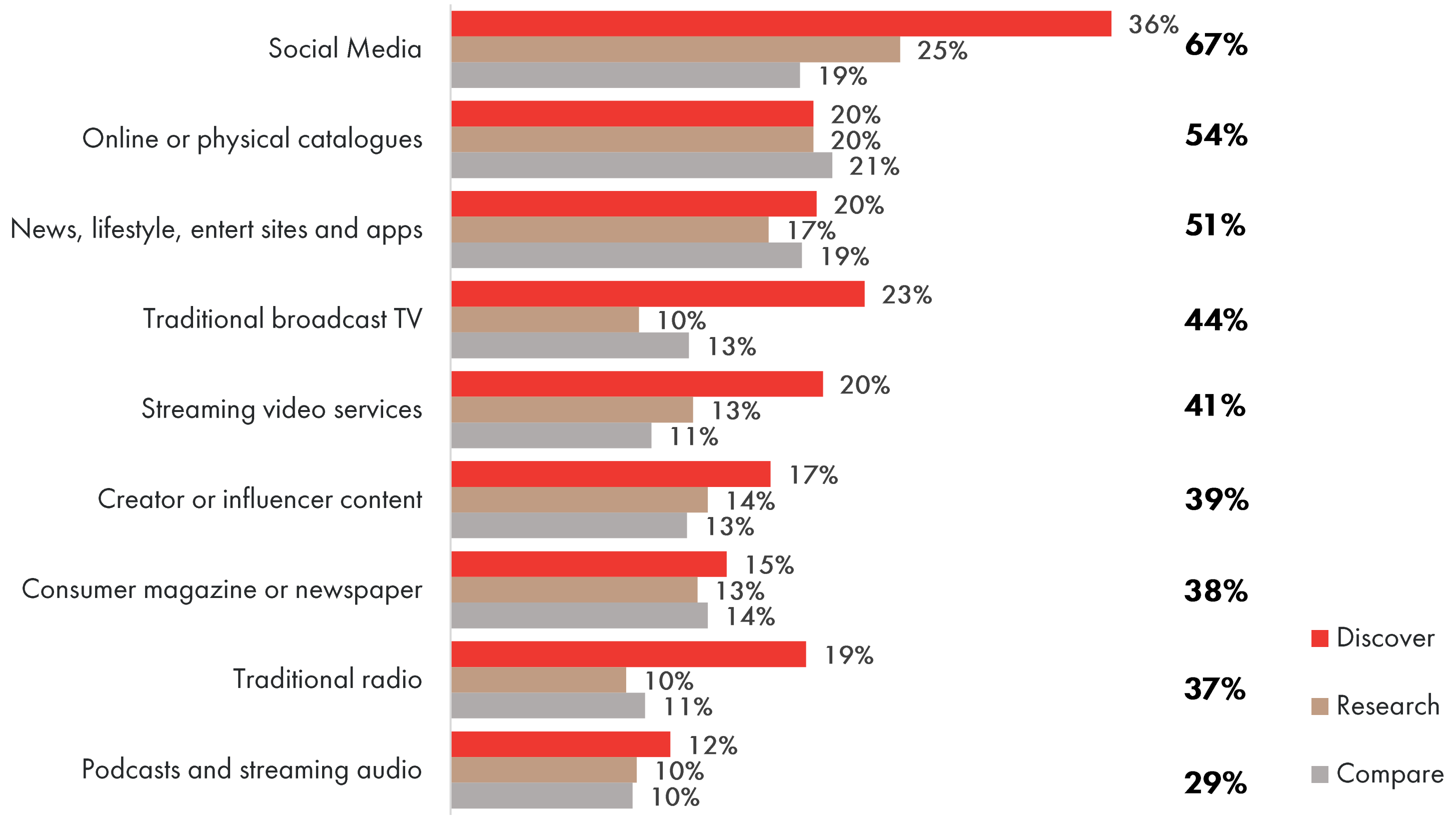


67%

use social media to discover, research or compare products and brands to buy.

heavier usage of social for 18 – 39's

Amongst online shoppers aged 18-39, 84% have used social media and 60% have used creator or influencer content to discover, research or compare products and brands to buy.

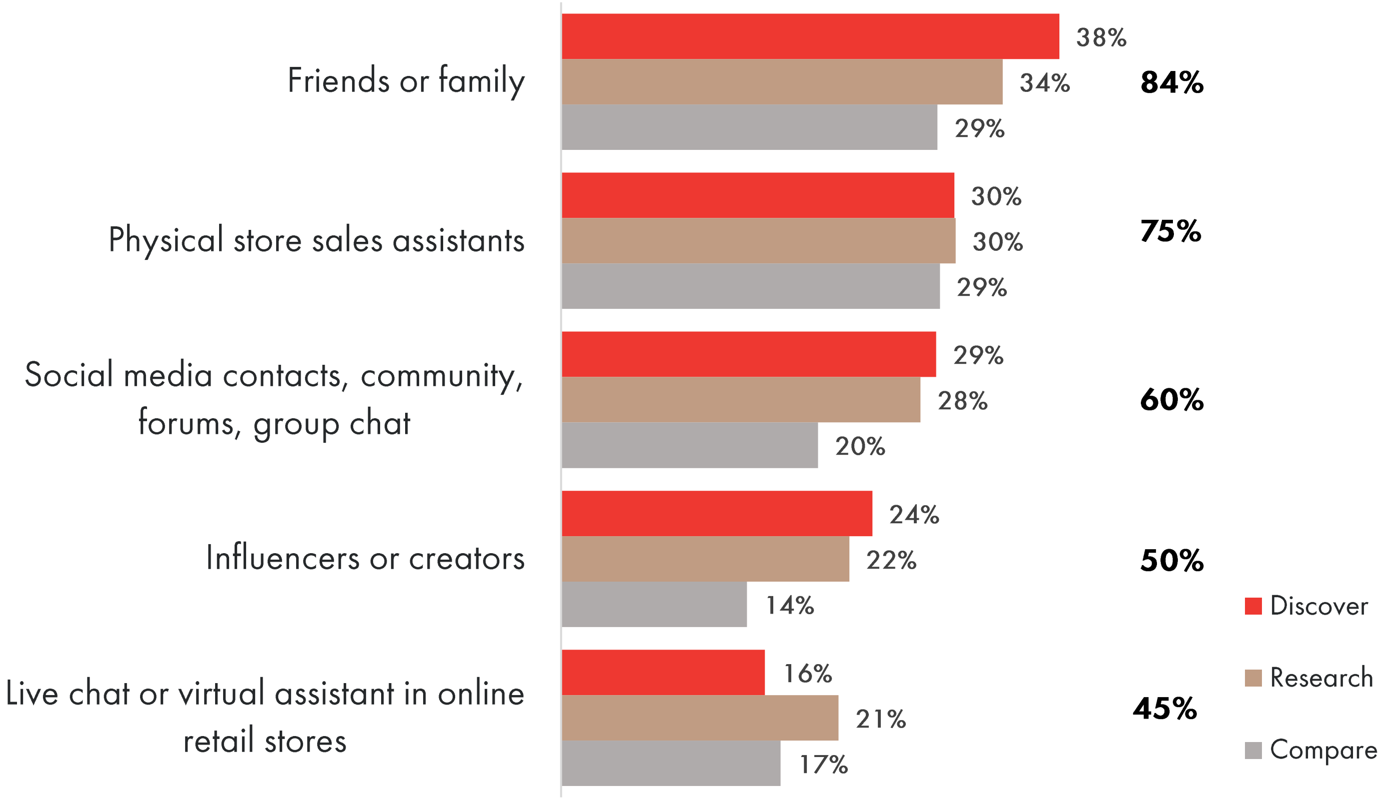
18-39s are also more likely to come across brands in streaming video and podcasts/streaming audio.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877

Q - How do you typically use each of the following media and content sources (including the advertising in this content), when discovering or researching products or brands to buy?

live chat emerging as a source for younger online shoppers

Amongst personal or interactive sources, friends and family are heavily relied to discover, research and compare products to buy.



84%

use family and friends, an important source at all stages of discovery and research.

live chat for shopping research

Generally personal or interactive sources are most heavily used in the discovery phase, except for live chat or virtual assistants that are more heavily relied on in the research phase.

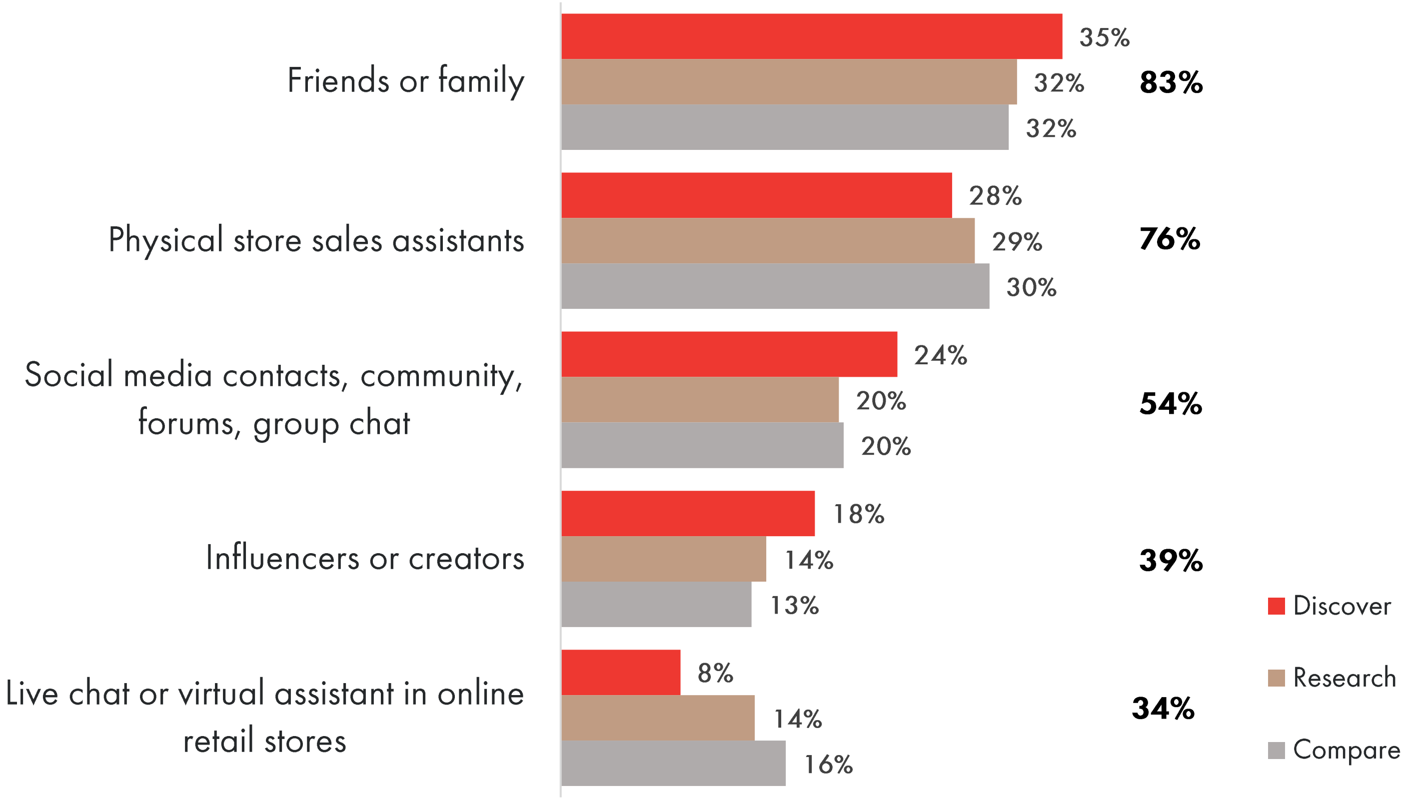
64% of online shoppers aged 18-39 have used live chat in an online retail store to discover, research or compare a product or brand to buy (compared to 45% of all online shoppers).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079

Q - How do you typically use each of the following personal or interactive sources when discovering or researching products or brands to buy?

live chat emerging as a source for younger online shoppers

Amongst personal or interactive sources, friends and family are heavily relied to discover, research and compare products to buy.



83%

use family and friends, an important source at all stages of discovery and research.

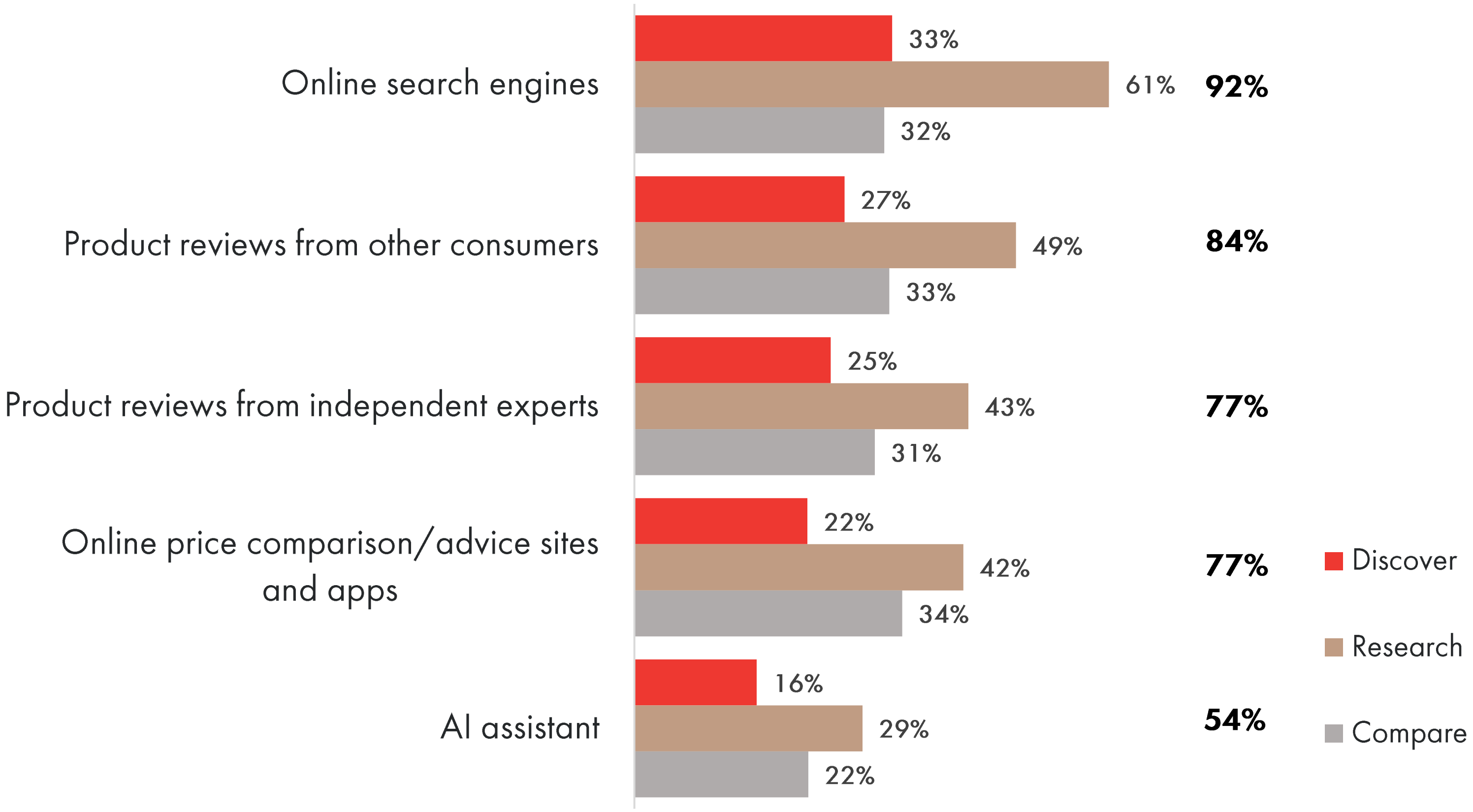
live chat for shopping research

44% of online shoppers aged 18-39 have used live chat in an online retail store to discover, research or compare a product or brand to buy (compared to 34% of all online shoppers).
In NZ, live chat or virtual assistants are more heavily used in the comparison phase.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How do you typically use each of the following personal or interactive sources when discovering or researching products or brands to buy?

AI assistants heavily used amongst shoppers in their 30s

Amongst services and tools, online search engines are most used, particularly in the research phase.



54%

of online shoppers have used an AI assistant (such as ChatGPT, Gemini etc) to discover, research or compare a product or brand to buy.

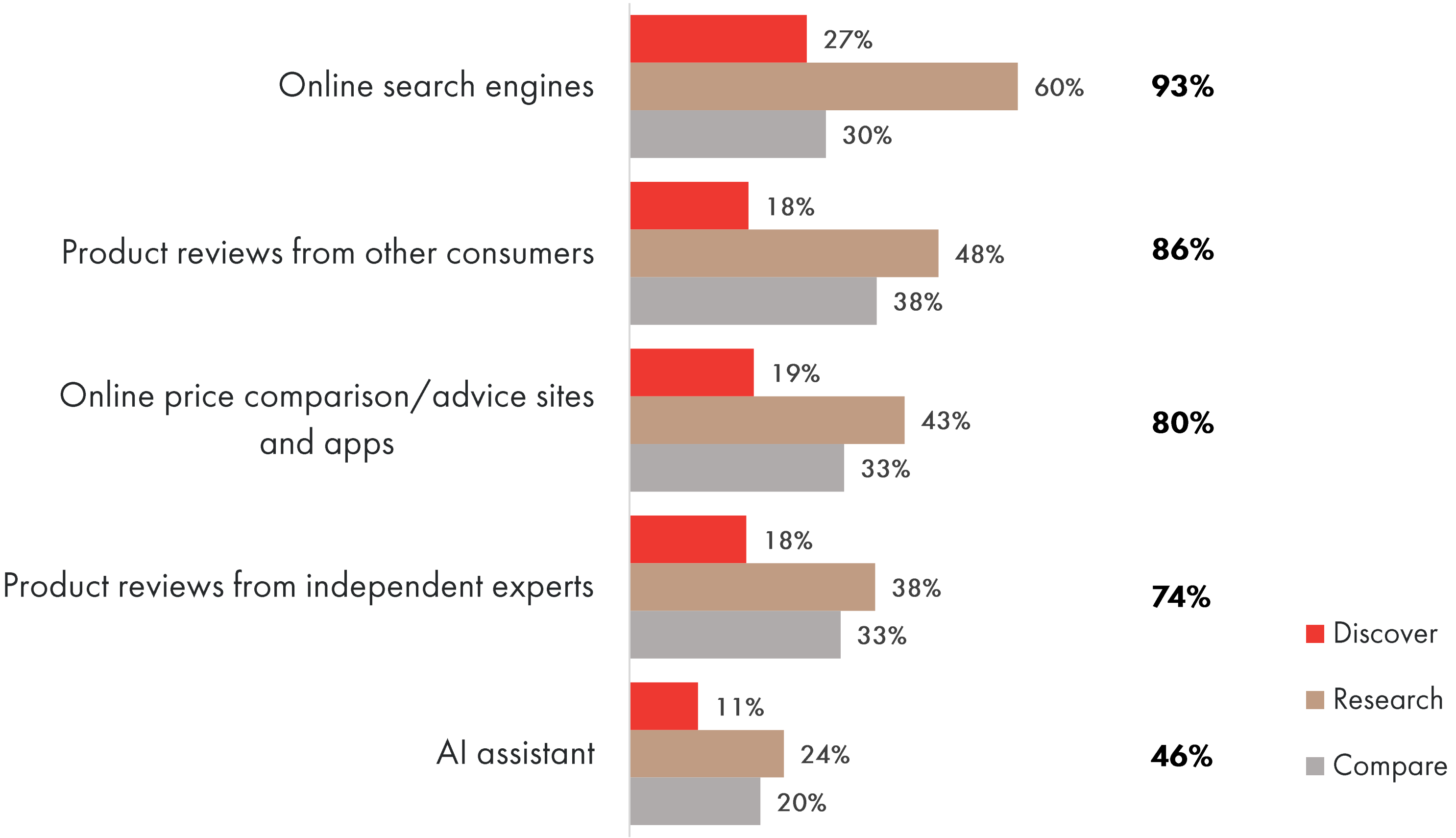
younger shoppers using AI assistants

63% of online shoppers aged 18-29 and 77% of online shoppers in their 30's have used an AI assistant to discover, research or compare a product to buy (compared to 54% of all online shoppers).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How do you typically use each of the following services and tools when discovering or researching products or brands to buy?

services and tools are heavily used in product research

Amongst services and tools, online search engines are most used, particularly in the research phase.



46%

of online shoppers have used an AI assistant (such as ChatGPT, Gemini etc) to discover, research or compare a product to buy.

AI assistants emerging in NZ

There is lower usage of AI assistants for shopping discovery and research in New Zealand than Australia, however 55% of NZ online shoppers aged 18-39 have used an AI assistant to discover, research or compare a product to buy.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How do you typically use each of the following services and tools when discovering or researching products or brands to buy?

methodology

online shopping behaviour

shopper motivations

product and brand discovery
- sources of discovery
- search
- ai
- creators and influencers
- shoppable media

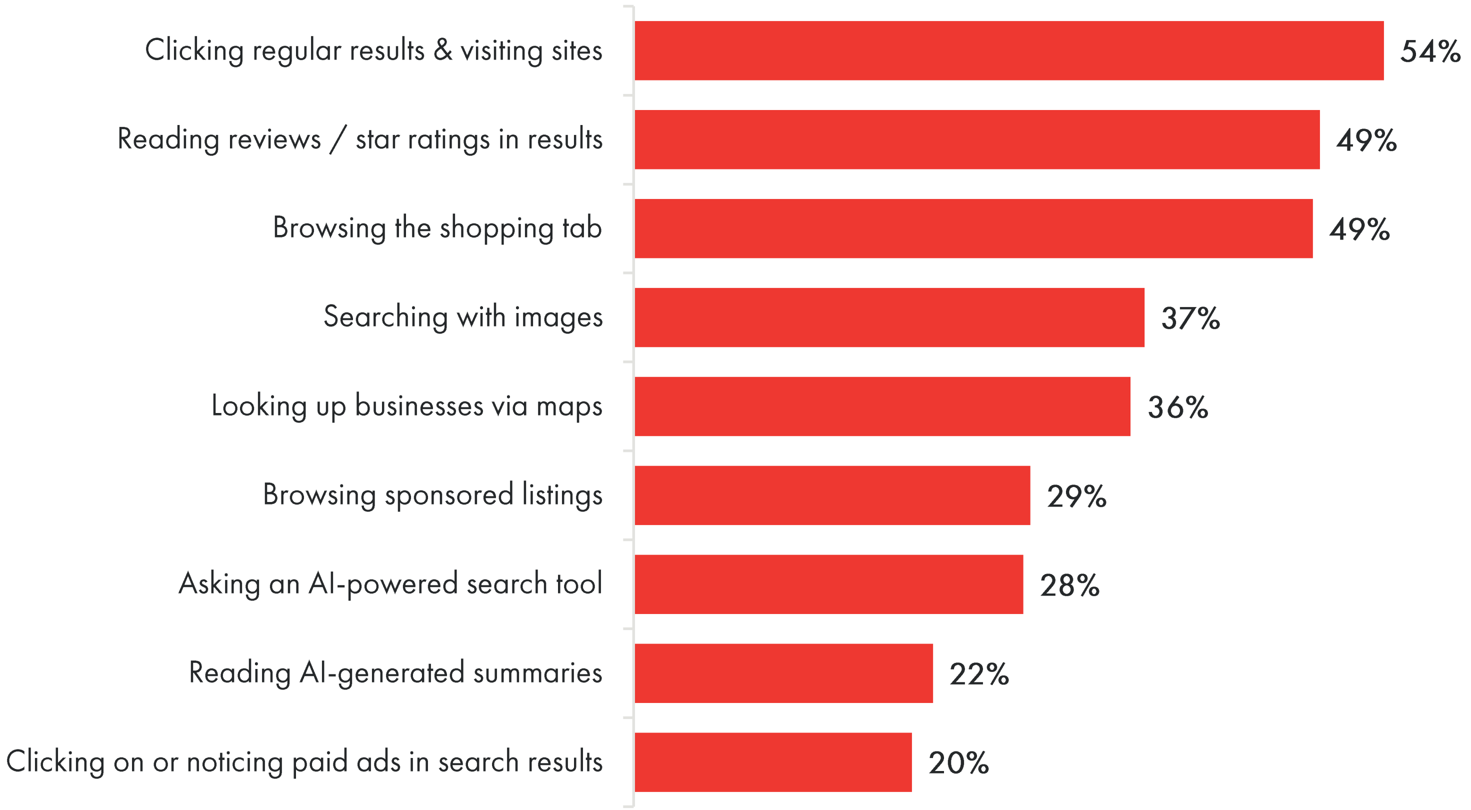
retail marketing and data exchange

04. product & brand discovery

iab. australia Pureprofile

how australians search

There are a range of ways online shoppers use online search to discover products and brands. Search is evolving from blue links to reviews, images and AI-generated answers. Use of regular results and clicking to visit websites is holding firm.



92%

say their use of regular search results and clicking on links to visit websites to find products and brands has increased or stayed the same in the past year.

search holds, but shifts

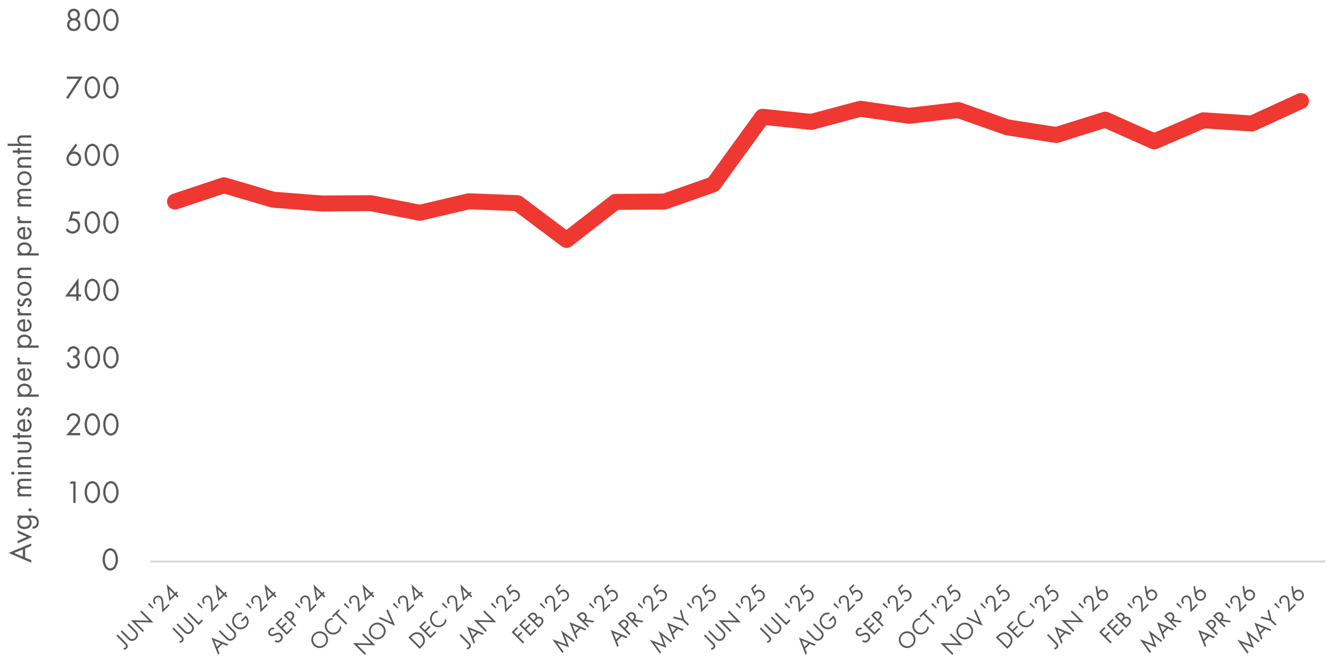
36% of online shoppers aged 18-39 have used an AI powered search tool to discover products or brands, compared to 28% of all online shoppers. Under 40's are more likely to be using AI generated summaries, image search and reviews/star ratings.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Which of the following ways have you used online search engines to discover products or brands?
Q - How has your usage of regular search results and clicking on links to visit websites to find products and brands changed over the last year?

increasing time spent on search engines

There is an increasing trend in the amount of time Australians are spending using online search engines. The time spent on online search has previously been relatively stable until the introduction of AI summaries have lifted the time spent within search engines.

time spent per month on search engines (avg min pp)



22% y o y

increase in avg minutes per person spent on search engines (May 2025 v May 2026).

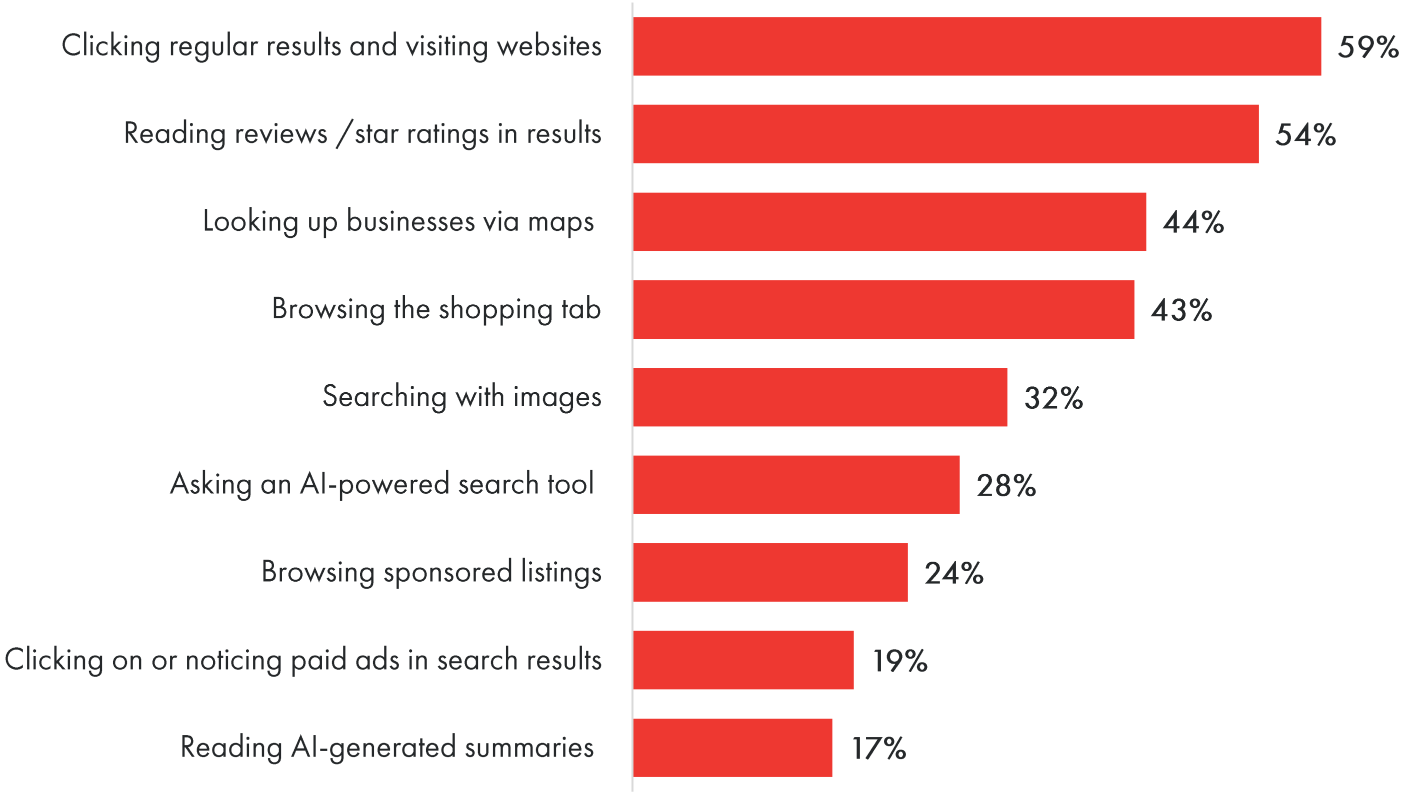
AI overviews lift time on search

AI-generated summaries appearing at the top of many search results have gradually lifted the time Australians spend each month in search engines. Australians spent on average 11 hours over the month of May 2026 using online search engines such as Google Search, Bing and Yahoo Search.

Source: Ipsos iris Online Audience Measurement Service June 24 - May 2026, age 14+, PC/laptop/smartphone/tablet, audience (000s), Avg mins PP, Search Engines category and Ipsos iris Online Audience Measurement Service May 2026 vs May 2025, age 14+, PC/laptop/smartphone/tablet, Avg mins PP, Search Engine category

how new zealanders search

There are a range of ways online shopper use online search to discover products and brands. Search is evolving from blue links to reviews, images and AI-generated answers. Use of regular results and clicking to visit websites is holding firm.



90%

say their use of regular search results and clicking on links to visit websites to find products and brands has increased or stayed the same in the past year

search holds, but shifts

35% of online shoppers aged 18-39 have used an AI powered search tool to discover products or brands (compared to 28% of all online shoppers). 18-29's are slightly less likely to be clicking on regular search results and visiting websites (53% of 18-29's compared to 59% of all online shoppers).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - Which of the following ways have you used online search engines to discover products or brands?
Q - How has your usage of regular search results and clicking on links to visit websites to find products and brands changed over the last year?

methodology

online shopping behaviour

shopper motivations

product and brand discovery

- sources of discovery
- search
- ai
- creators and influencers
- shoppable media

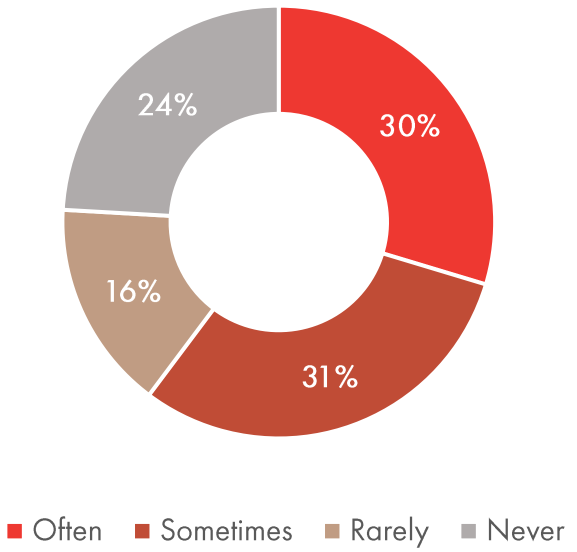
retail marketing and data exchange

04. product & brand discovery

ai becomes part of the shopping toolkit

Six in ten online shoppers (and 75% of online shoppers aged 18-39) now use AI powered tools and features at least sometimes when shopping, most often to compare prices, question and shortlist before buying.

frequency of using AI tools when shopping

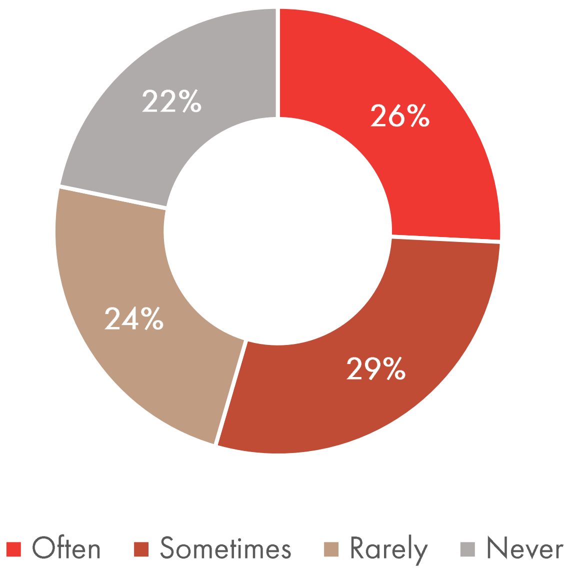


top tasks AI users do (among AI users)

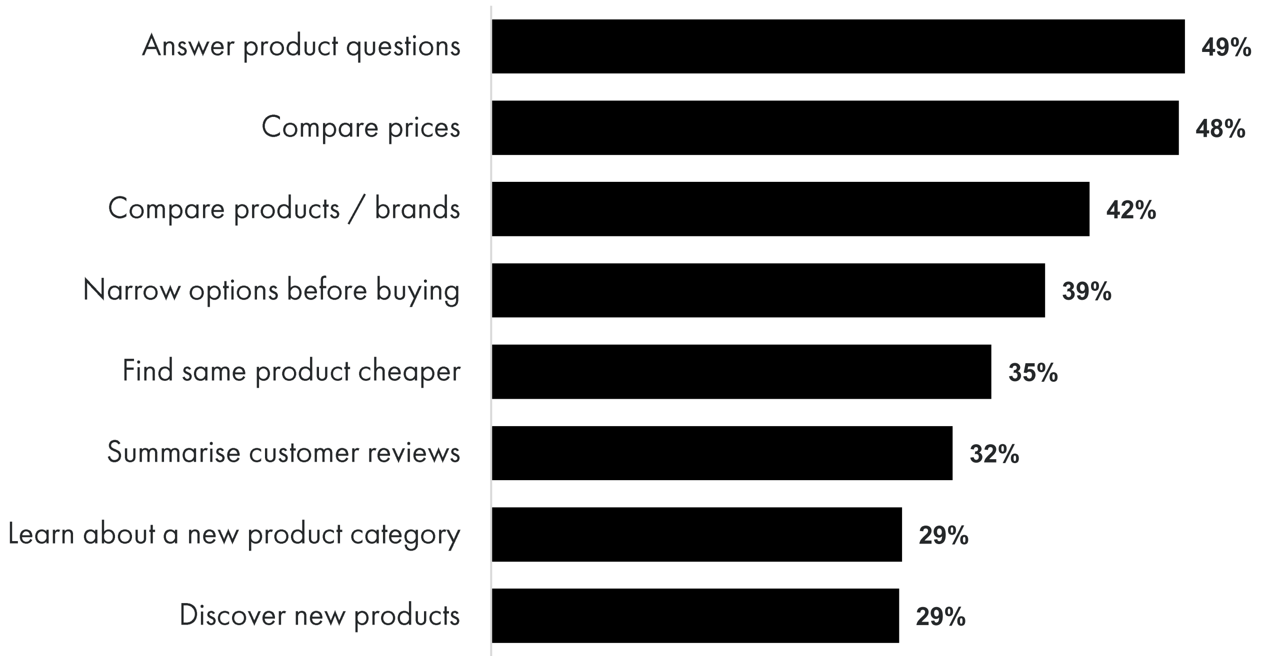
ai becomes part of the shopping toolkit

55% of New Zealand shoppers (and 61% of online shoppers aged 18-39) now use AI tools at least sometimes when shopping, most often to answer product questions and compare prices.

frequency of using AI tools when shopping



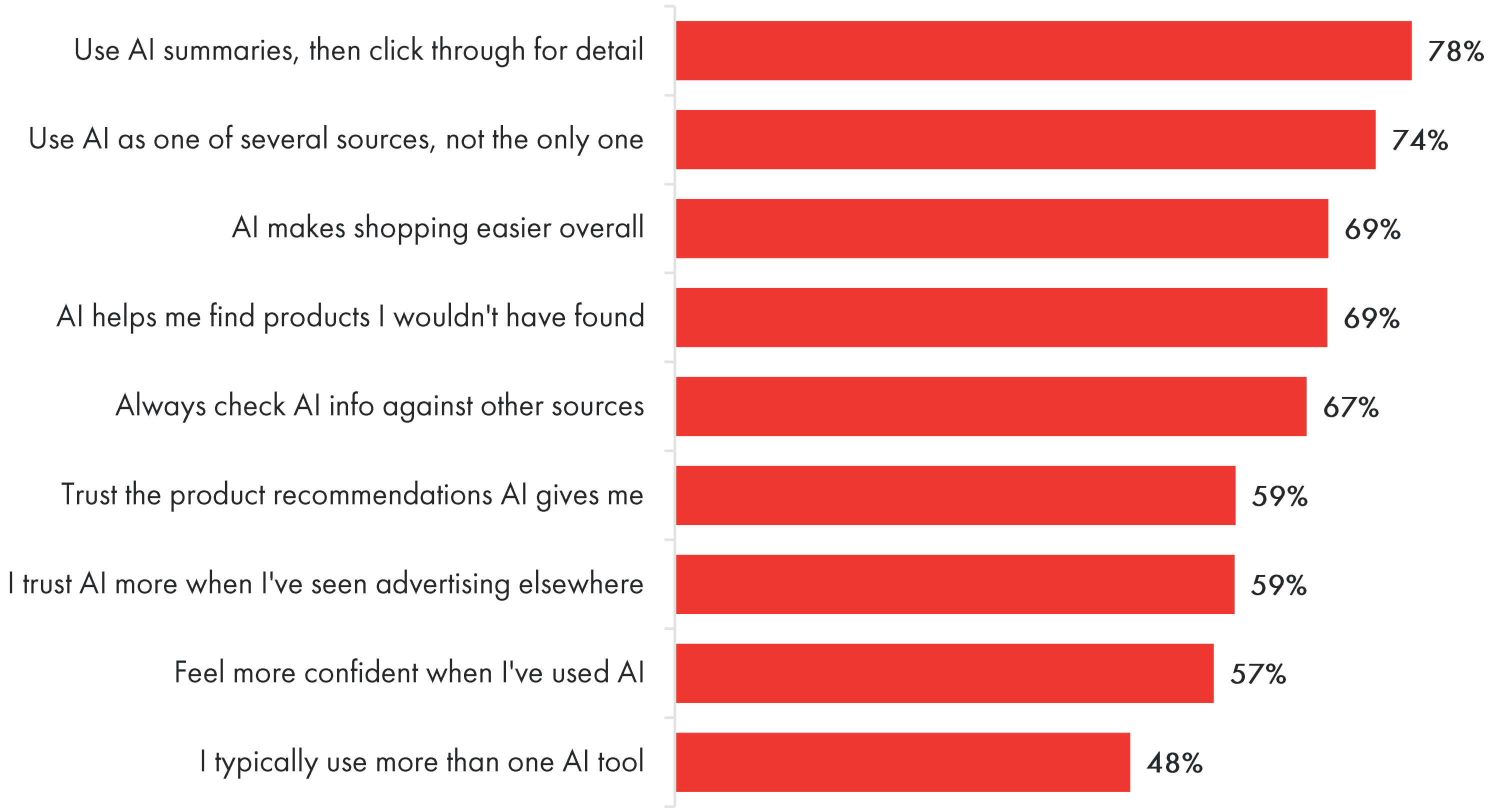
top tasks AI users do (among AI users)



Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How often do you use AI-powered tools or features (such as reading AI generated overviews or asking questions using an AI tool) when researching or shopping for products or services?
Q - Which of the following shopping tasks do you use AI-powered tools or features for?

ai builds confidence — but rarely stands alone

Online shoppers who use AI for shopping find it makes shopping easier and surfaces new products but treat it as one input among several and generally click through to websites for detail and verify before acting.



78%

of online shoppers using AI when shopping use AI summaries for a quick answer, then click through to sites for detail.

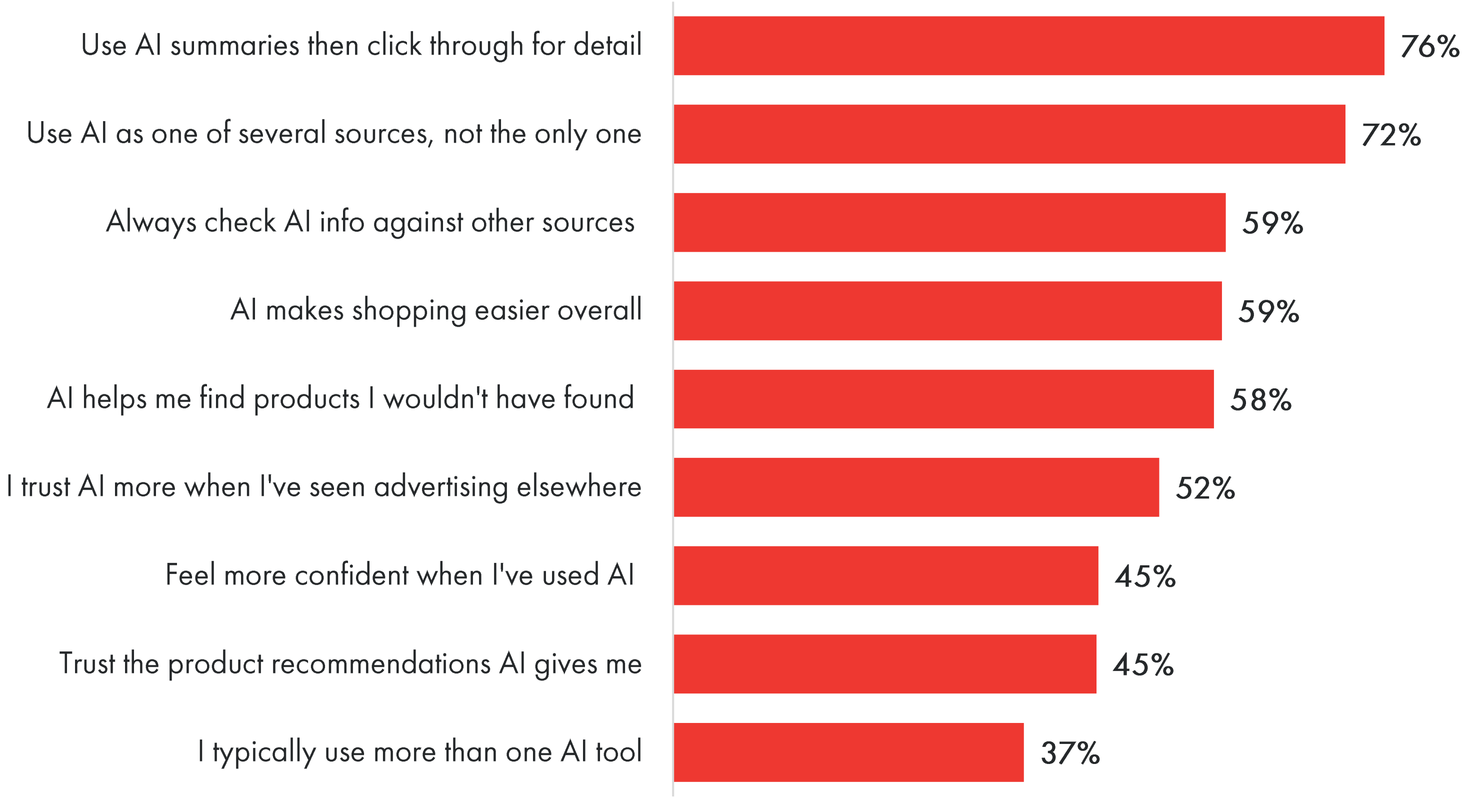
assistive, not autonomous

AI has become an established source of research, yet shoppers keep a hand on the wheel, cross-checking and combining it with other sources. Only 15% strongly agree (59% strongly or somewhat agree) that they trust the product recommendations AI provides.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=650 (amongst those using AI for shopping)
Q - How much do you agree or disagree with the following statements about shopping using AI-powered tools and features? (Strongly agree or Somewhat agree)

ai makes shopping easier but trust is even lower in new zealand

Online shoppers who use AI for shopping find it makes shopping easier and surfaces new products, however trust in its recommendations is lower than in Australia and NZ shoppers treat it as one input among several and verify before acting.



76%

of online shoppers using AI when shopping use AI summaries for a quick answer, then click through to sites for detail.

assistive, not autonomous

AI has become an established source of research, yet shoppers keep a hand on the wheel, cross-checking and combining it with other sources. Only 10% strongly agree (45% strongly or somewhat agree) that they trust the product recommendations AI provides.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=478 (amongst those using AI for shopping)
Q - How much do you agree or disagree with the following statements about shopping using AI-powered tools and features? (Strongly agree or Somewhat agree)

trust gaps temper ai's momentum

Accuracy and privacy are the leading reservations about using AI tools when shopping, a reminder that confidence in AI shopping is still being earned.

8 in 10

have some concern about using AI to find and research products when shopping.

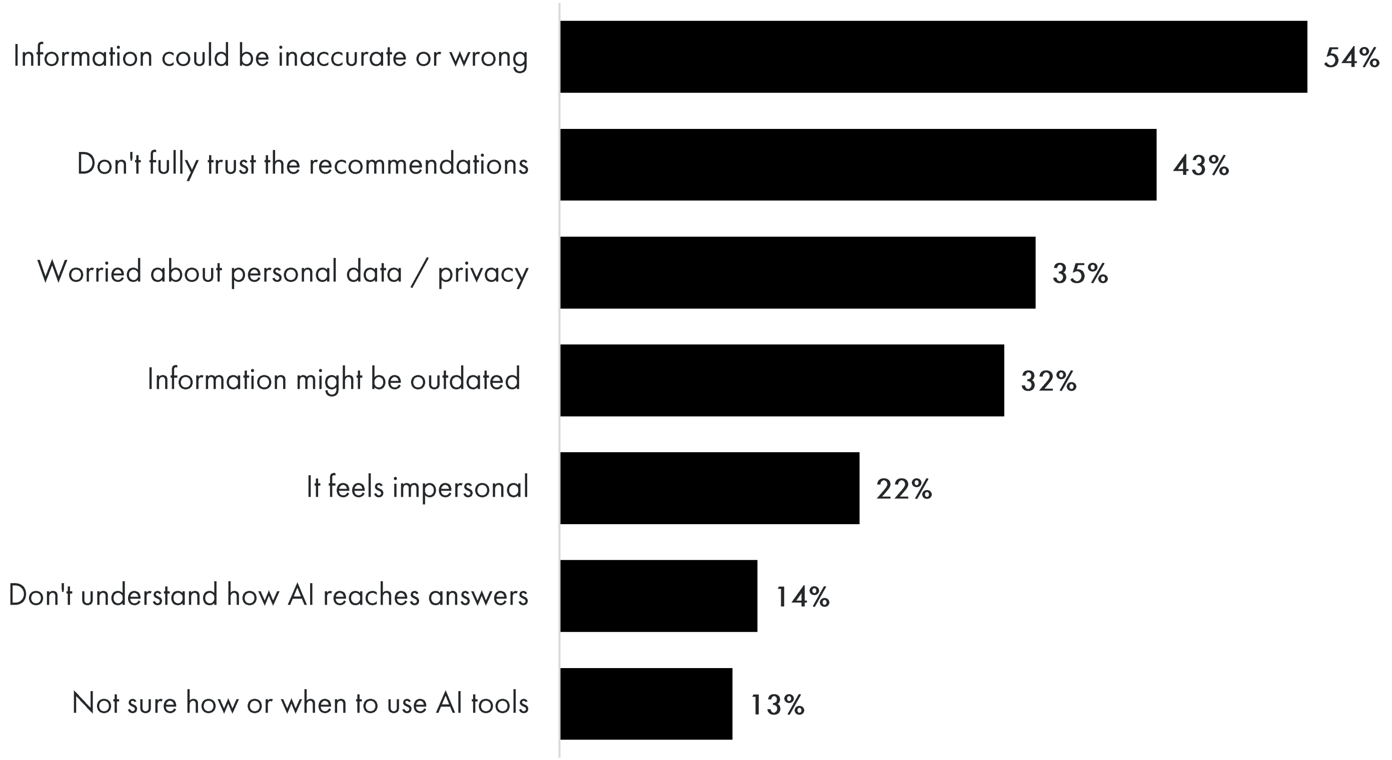
the trust to-do list

Online shoppers aged 50-70 are more distrusting of the recommendations from AI (46% don't fully trust, compared to 35% of all online shoppers).
Younger online shoppers (particularly 18-29s) are more likely to be concerned the information might be outdated.
Accuracy, data handling and explainability are the levers that will determine how far AI moves from research aid to purchase driver.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - What concerns, if any, do you have about using AI tools to find and research products when shopping?

trust gaps temper ai's momentum

New Zealand online shoppers are generally more concerned than Australians about using AI to find and research products when shopping. Accuracy, trust in recommendations and privacy are the leading reservations, a reminder that confidence in AI shopping is still being earned.



9 in 10

have some concern about using AI to find and research products when shopping.

the trust to-do list

43% of NZ online shoppers don't fully trust AI recommendations, compared to 35% of Australian online shoppers.

Accuracy, data handling and explainability are the levers that will determine how far AI moves from research aid to purchase driver.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - What concerns, if any, do you have about using AI tools to find and research products when shopping?

methodology

online shopping behaviour

shopper motivations

product and brand discovery
- sources of discovery
- search
- ai
- creators and influencers
- shoppable media

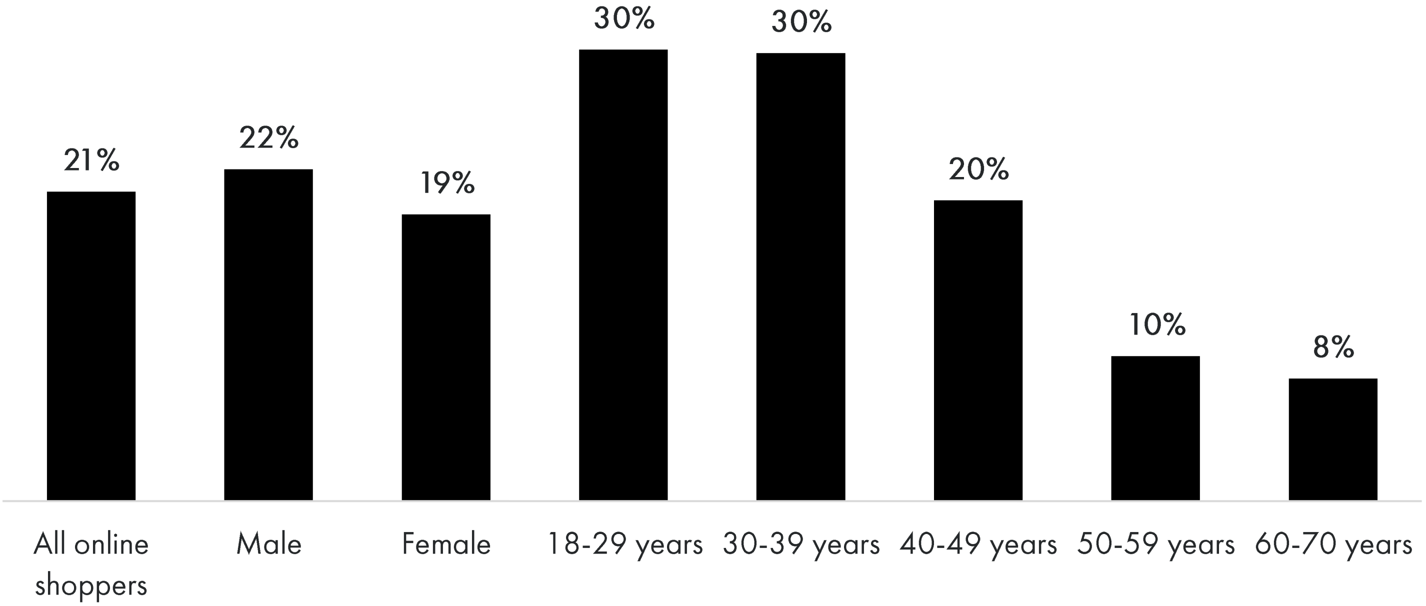
retail marketing and data exchange

04. product & brand discovery

the creator economy spans communities to celebrities

1 in 5 online shoppers describe themselves as a content creator or influencer who promotes products and brands – where survey respondents have used their own definition of a content creator or influencer.

% agree they describe themselves as a content creator or influencer who promotes products and brands



30%

of online shoppers aged 18-39 describe themselves as a content creator or influencer who promotes products and brands.

the creator economy spans a wide range of categories

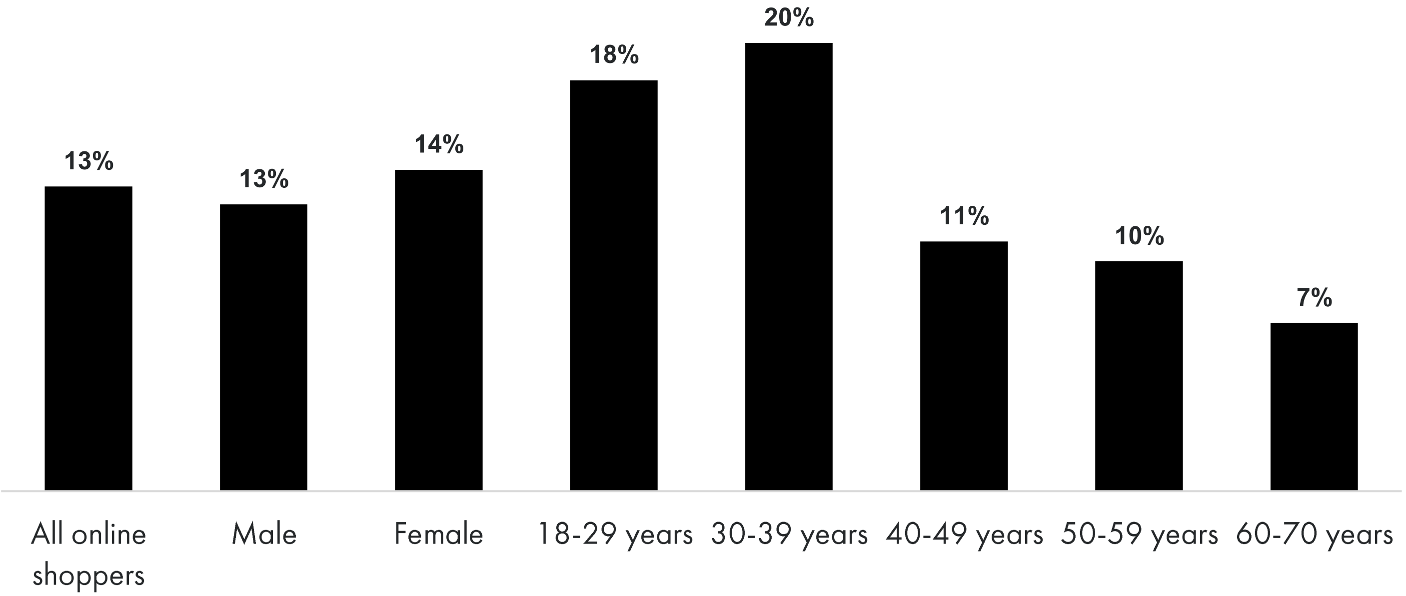
Brand-promoting creators and influencers can range from local, hobby or community content creators with a small number of followers through to full-time content businesses, podcasts, YouTube channels, newsletters with broad reach and celebrity-like influence - although only a small proportion earn meaningful income from it.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How much do you agree or disagree with the following? (strongly or somewhat agree)

the creator economy spans communities to celebrities

1 in 5 online shoppers aged 18-39 describe themselves as a content creator of influencer who promotes products and brands – where respondents have used their own definition of a content creator or influencer.

% agree they describe themselves as a content creator or influencer who promotes products and brands



19%

of online shoppers aged 18-39 describe themselves as a content creator or influencer who promotes products and brands.

the creator economy spans a wide range of categories

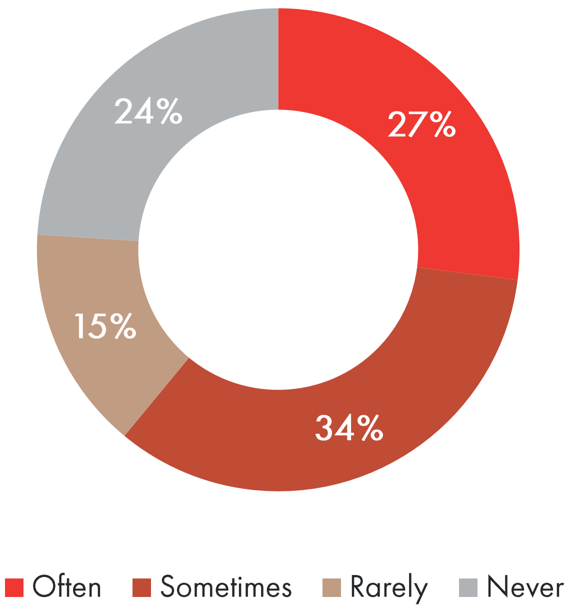
Brand-promoting creators and influencers can range from local, hobby or community content creators with a small number of followers through to full-time content businesses, podcasts, YouTube channels, newsletters with broad reach and celebrity-like influence - although only a small proportion earn meaningful income from it.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How much do you agree or disagree with the following? (strongly or somewhat agree)

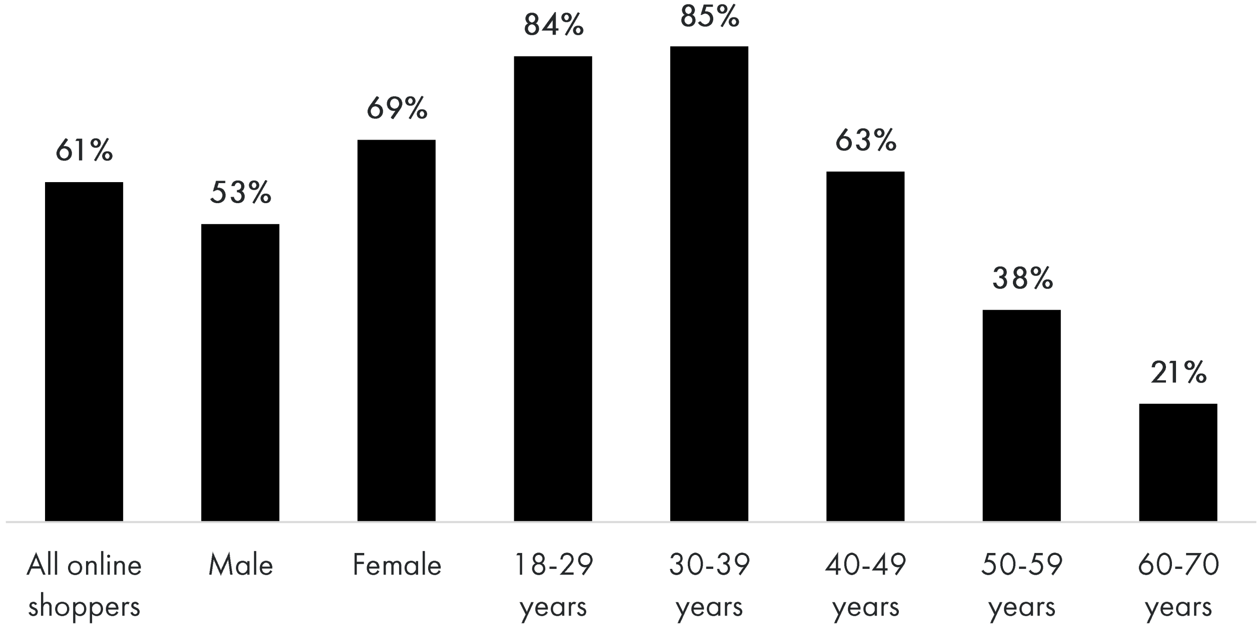
influencers and content creators a major source of discovery

61% of online shoppers (85% of online shoppers aged 18-39) often or sometimes discover or find out information about brands and products promoted by influencers or content creators that they follow online in places like social media, video platforms and podcasts.

frequency of discovering brands and products promoted by influencers or content creators



% online shoppers often/sometimes discover brands and products promoted by influencers or content creators

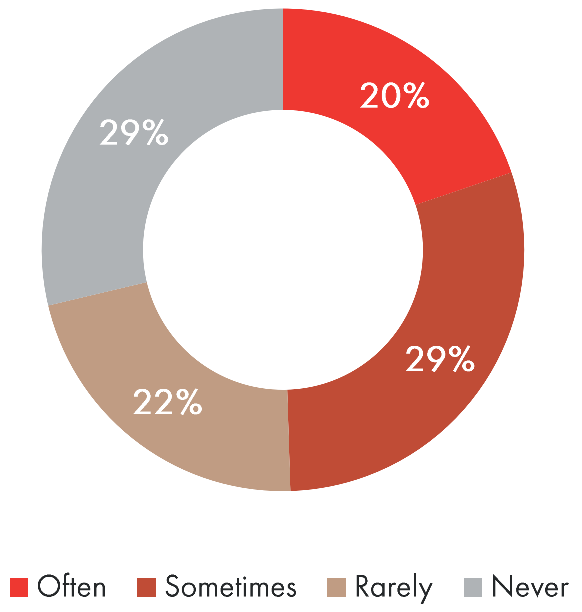


Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How often do you discover or find out information about brands and products promoted by influencers or content creators that you follow online in places like social media, video platforms and podcasts?

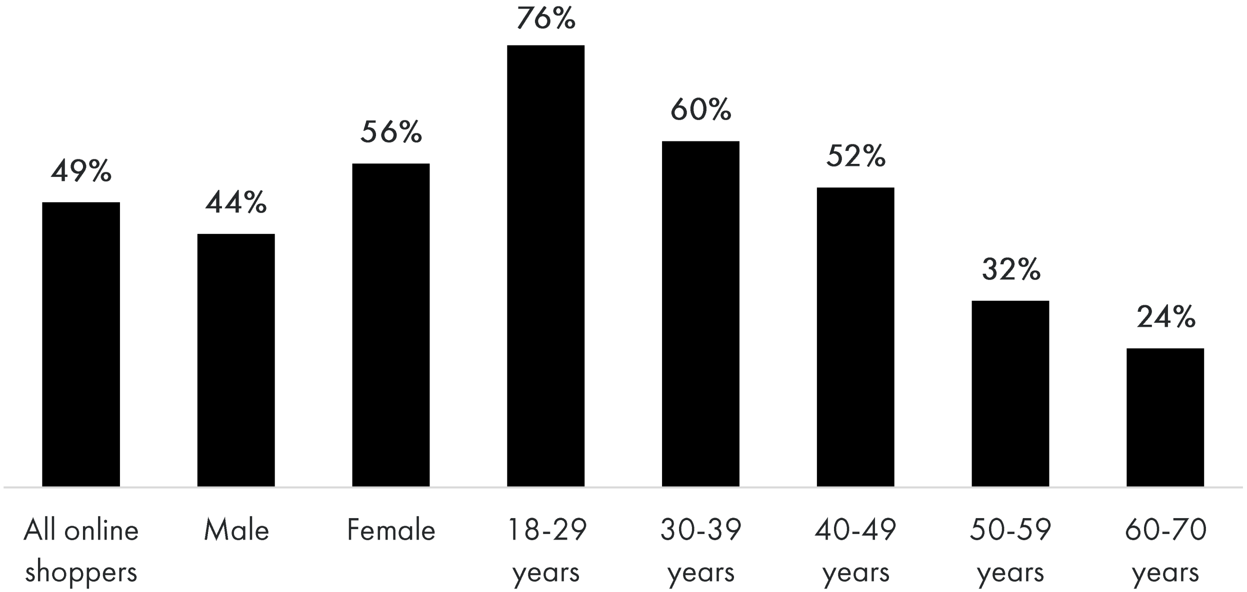
influencers and content creators a major source of discovery

49% of online shoppers (76% of online shoppers aged 18-29) often or sometimes discover or find out information about brands and products promoted by influencers or content creators that they follow online in places like social media, video platforms and podcasts.

frequency of discovering brands and products promoted by influencers or content creators



% online shoppers often/sometimes discover brands and products promoted by influencers or content creators

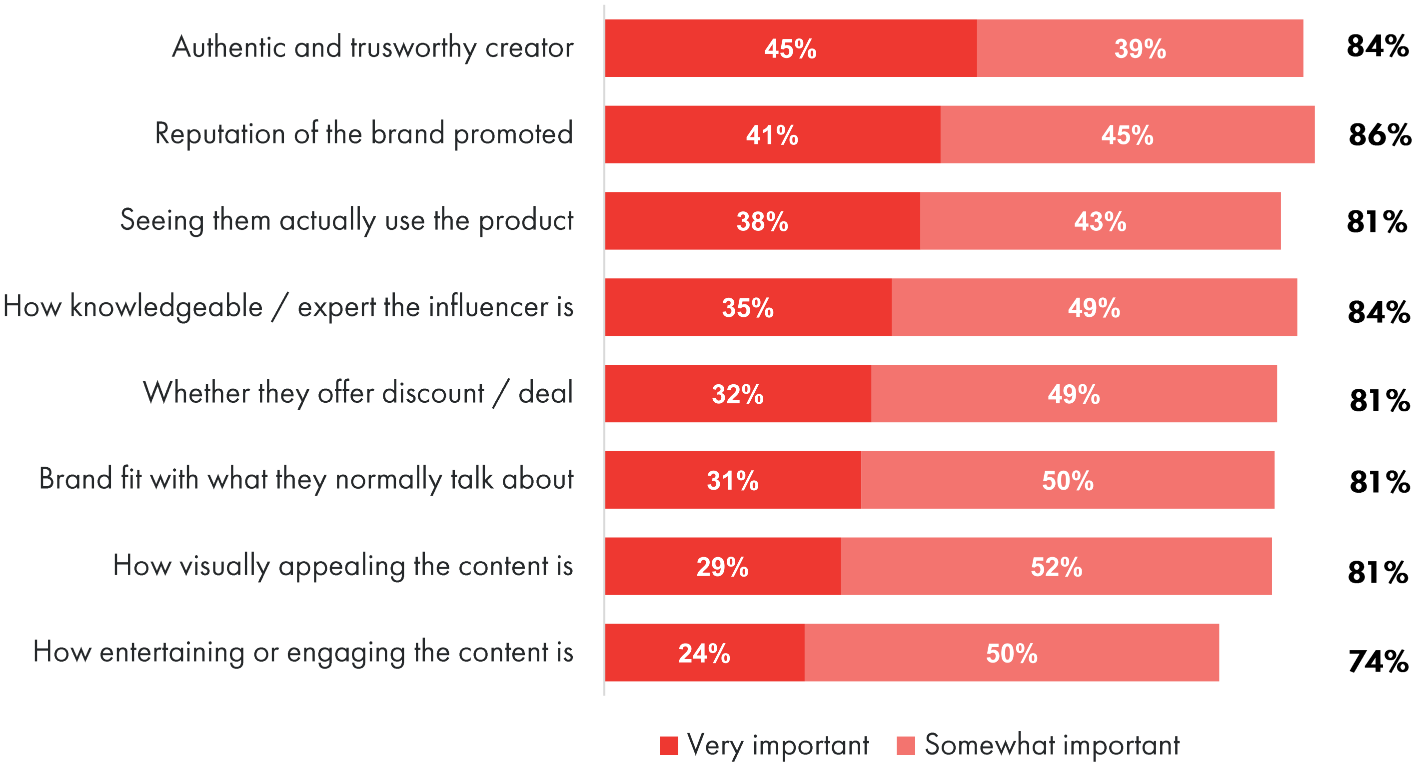


Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How often do you discover or find out information about brands and products promoted by influencers or content creators that you follow online in places like social media, video platforms and podcasts?

influence rests on brand reputation and creator authenticity

Just over a quarter of online shoppers regularly discover products through creators, and trust hinges on brand reputation and creator authenticity and expertise.

most important factors when acting on creator recommendations



86%

of online shoppers think the reputation of the brand being promoted is at least somewhat important when acting on creator recommendations.

the paid-partnership paradox

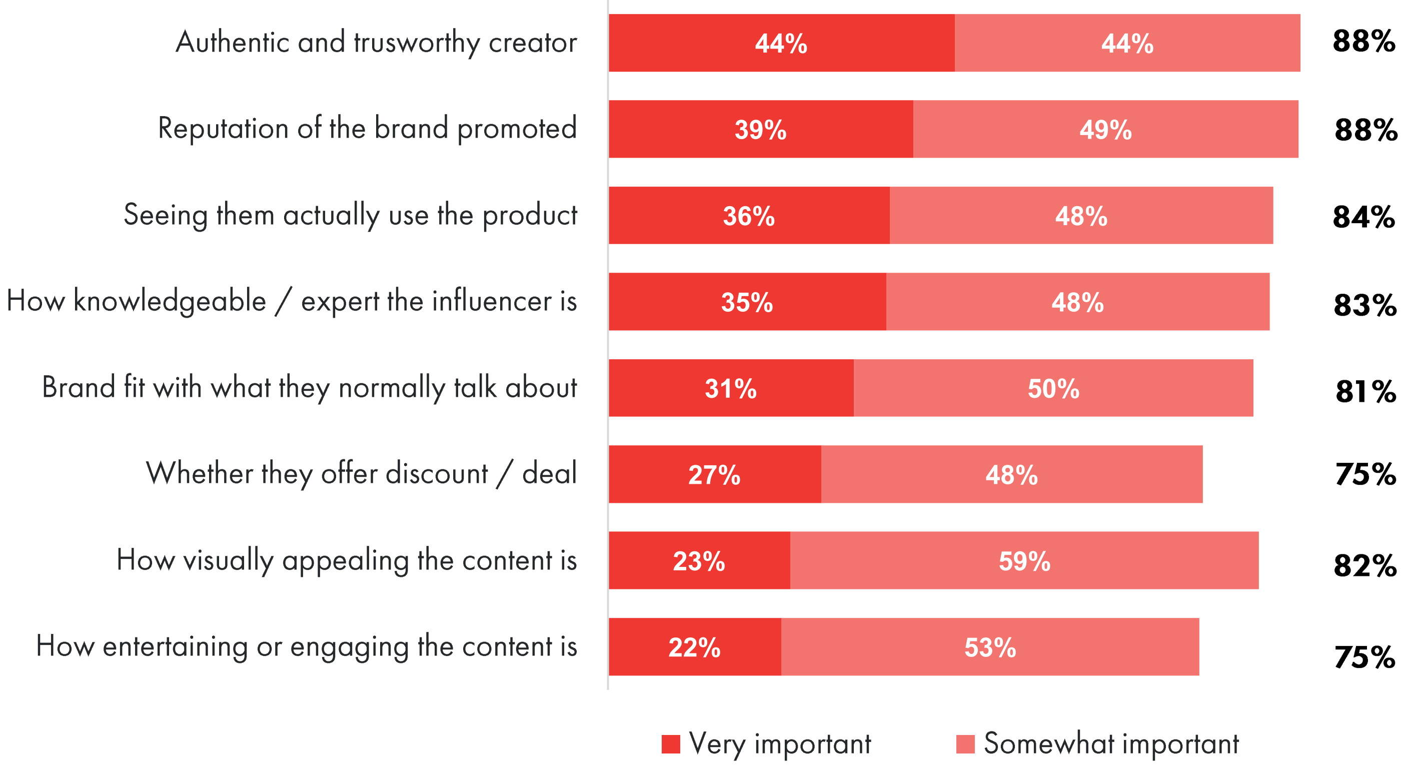
When a post is known to be paid, 44% are less likely to act. This is higher amongst online shoppers aged 50-70 (54% are less likely to act). Disclosure raises the bar on authenticity.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How important are the following when you are considering brands and products to buy that are promoted by influencers or content creators?

influence rests on brand reputation and creator authenticity

20% of online shoppers regularly discover products through creators and trust hinges on brand reputation and creator authenticity and expertise.

most important factors when acting on creator recommendations



88%

of online shoppers think the reputation of the brand being promoted is at least somewhat important when acting on creator recommendations.

the paid-partnership paradox

When a post is known to be paid, 42% are less likely to act. In NZ, female online shoppers are far less likely to act (49%) compared to male online shoppers (37%). Disclosure raises the bar on authenticity.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How important are the following when you are considering brands and products to buy that are promoted by influencers or content creators?

methodology

online shopping behaviour

shopper motivations

product and brand discovery

- sources of discovery
- search
- ai
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- shoppable media

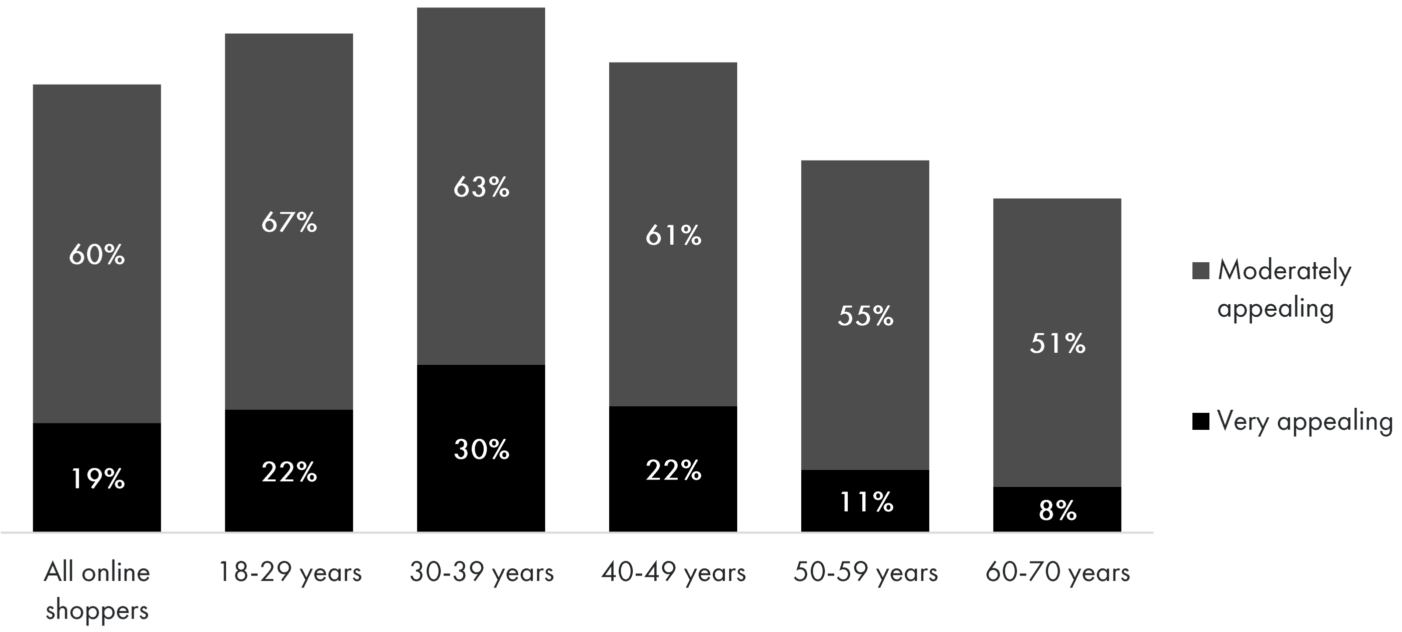
retail marketing and data exchange

04. product & brand discovery

appeal in frictionless shoppable media experiences

8 in 10 online shoppers find some level of appeal in discovering and buying a product without leaving the app or website they are on, for example shopping directly within social media, search, or streaming TV platforms.

appeal in discovering and buying a product without leaving the app or website



26%

of online shoppers aged 18-39 find it very appealing to find and buy without leaving a website or app.

frequent shoppers are more familiar

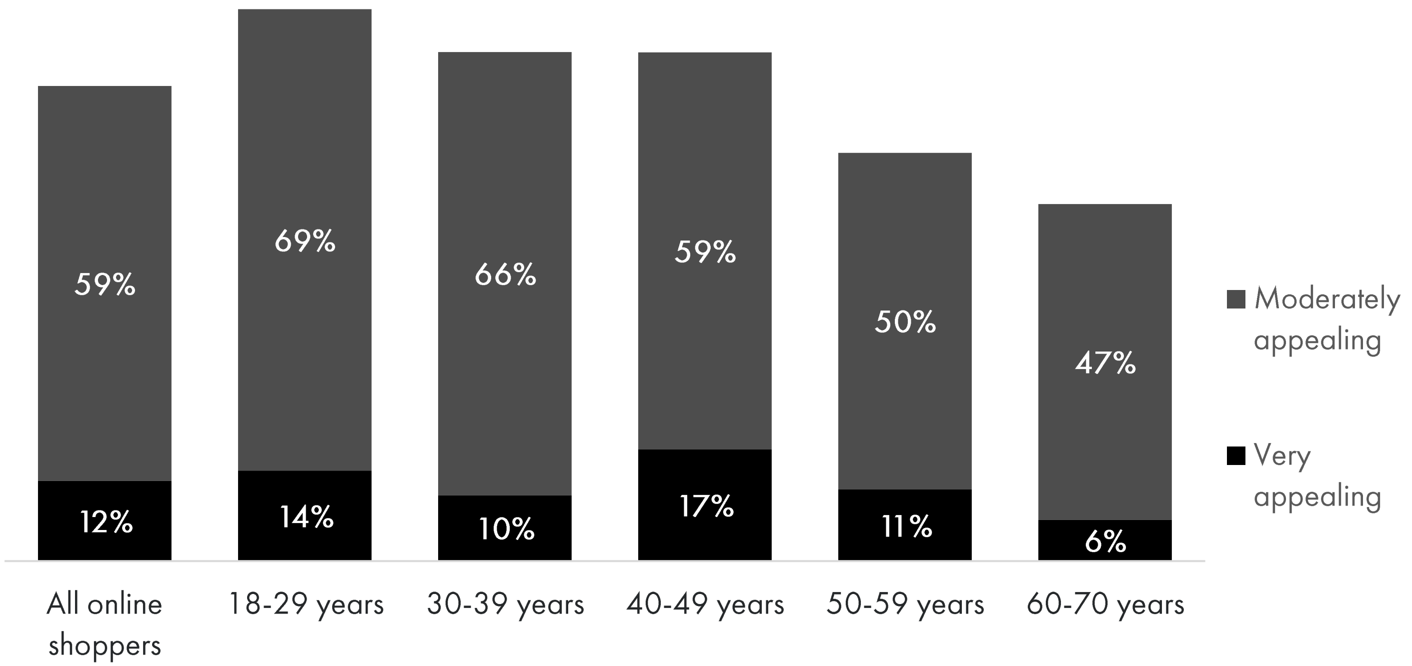
35% of weekly online shoppers of non-grocery retail find it very appealing to be able to move from discovery to purchase in a single, seamless experience without switching apps, opening new browser tabs, or re-entering information.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How appealing do you find the ability to discover and buy a product without leaving the app or website you're on — for example, shopping directly within social media, search, or streaming TV platforms

appeal in frictionless shoppable media experiences

7 in 10 online shoppers find some level of appeal in discovering and buying a product without leaving the app or website they are on, for example shopping directly within social media, search, or streaming TV platforms.

% appeal in discovering and buying a product without leaving the app or website



78%

of online shoppers aged 18-49 find some level of appeal in finding and buying without leaving a website or app.

frequent shoppers are more familiar

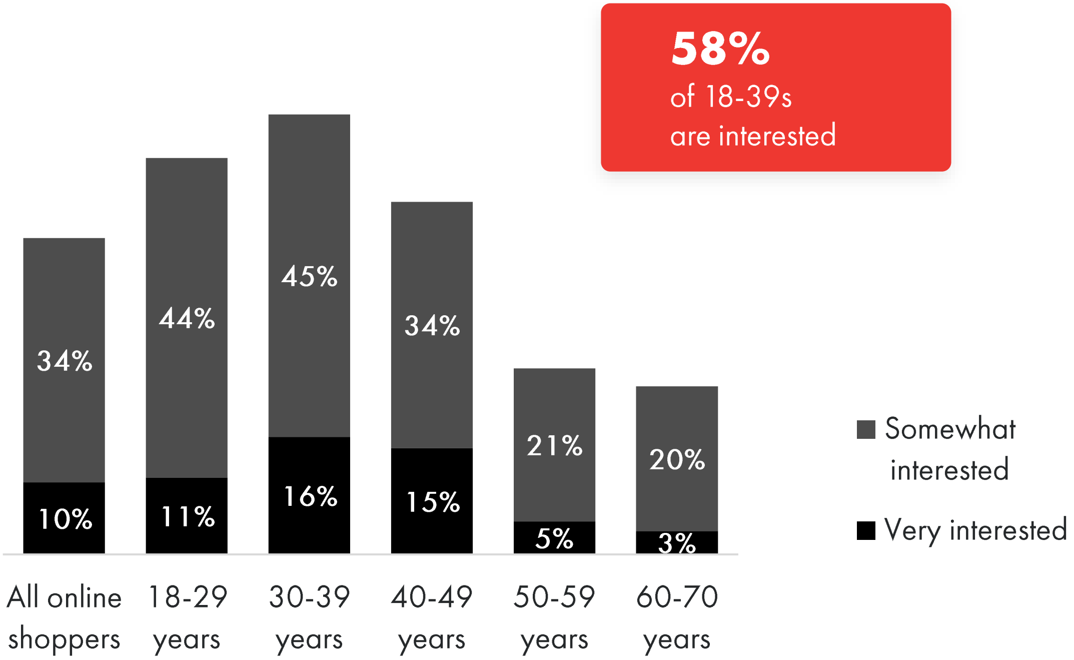
80% of NZ weekly online shoppers find some level of appeal in being able to move from discovery to purchase in a single, seamless experience without switching apps, opening new browser tabs, or re-entering information.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How appealing do you find the ability to discover and buy a product without leaving the app or website you're on — for example, shopping directly within social media, search, or streaming TV platforms

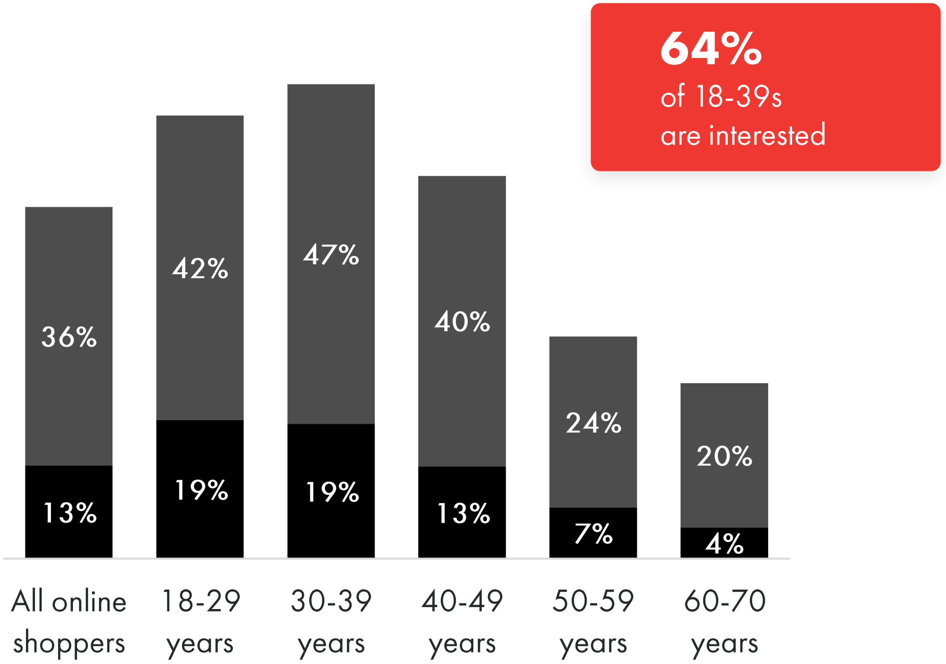
shoppable TV creates a seamless path to purchase

Online shoppers are somewhat interested in shoppable streaming TV features, with higher interested amongst online shoppers aged under 50.

% of online shoppers interested in buying a product directly from a TV ad, using payment details already saved in their streaming account



% of online shoppers interested in scanning a QR code on screen during a TV ad to buy the product on your phone



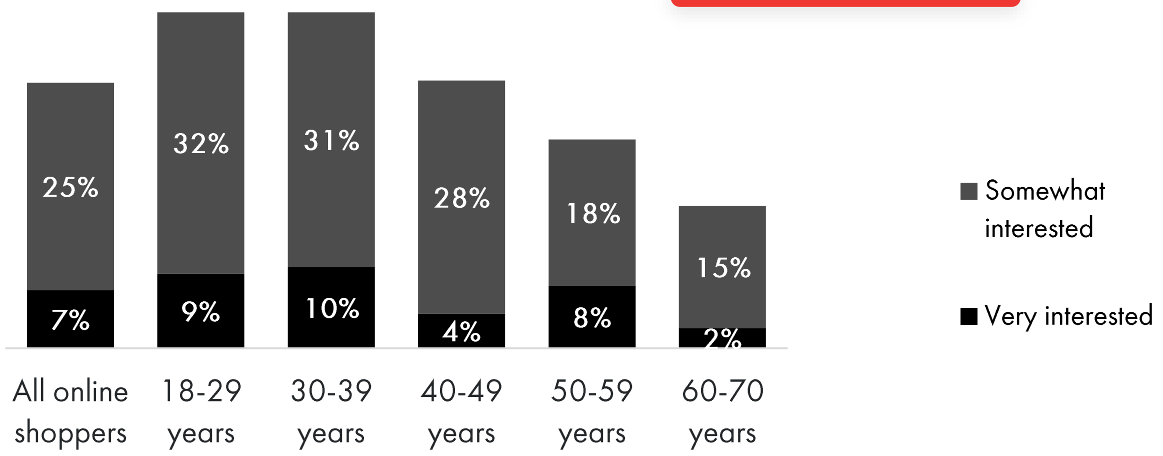
Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How interested would you be in using the following features when watching ads on a streaming TV service that includes advertising?

shoppable TV creates a seamless path to purchase

Online shoppers are somewhat interested in shoppable streaming TV features, with higher interested amongst online shoppers aged under 50.

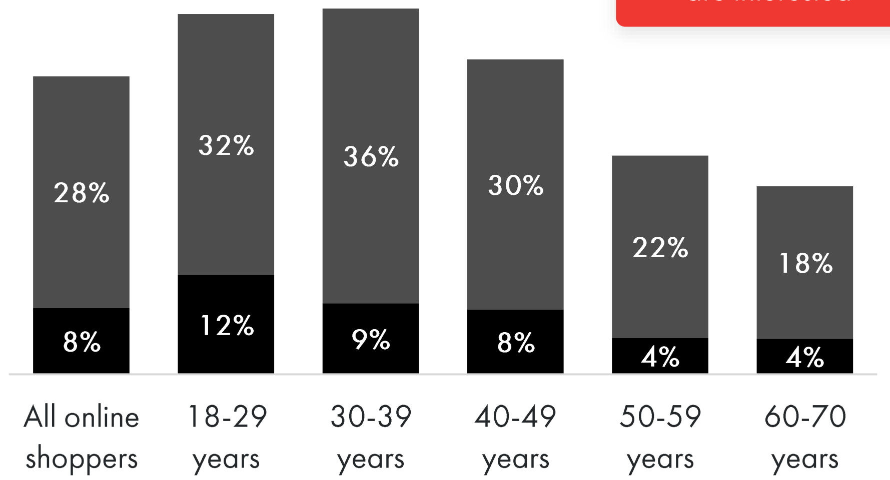
% of online shoppers interested in buying a product directly from a TV ad, using payment details already saved in their streaming account

41%
of 18-39s
are interested



% of online shoppers interested in scanning a QR code on screen during a TV ad to buy the product on your phone

44%
of 18-39s
are interested



Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How interested would you be in using the following features when watching ads on a streaming TV service that includes advertising?

shoppable media: interest meets caution

In-platform and shoppable streaming TV features appeal to a meaningful minority, but payment security and product trust hold many back.

main concerns about buying directly through ads

88%

of online shoppers have some concern about buying directly through ads.

18–39-year-olds have less concern

18-39's year old online shoppers have significantly less concern about payment details not being secure, with not being able to verify product quality and not trusting the advertiser.

Consumer confidence in privacy and security will be needed for shoppable media to gain greater traction.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079

Q - What are your main concerns, if any, about buying products directly through ads without leaving the platform (for example on social media, search or streaming TV platforms)?

shoppable media: interest meets caution

In-platform and shoppable streaming TV features appeal to a meaningful minority, but payment security and product trust hold many back.

main concerns about buying directly through ads

91%

of online shoppers have some concern about buying directly through ads.

Higher concerns in NZ with trust in the seller

New Zealand online shoppers have higher levels of concern than Australians with trust in the seller and not being able to verify the product quality first.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - What are your main concerns, if any, about buying products directly through ads without leaving the platform (for example on social media, search or streaming TV platforms)?

methodology

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product and brand discovery

- sources of discovery
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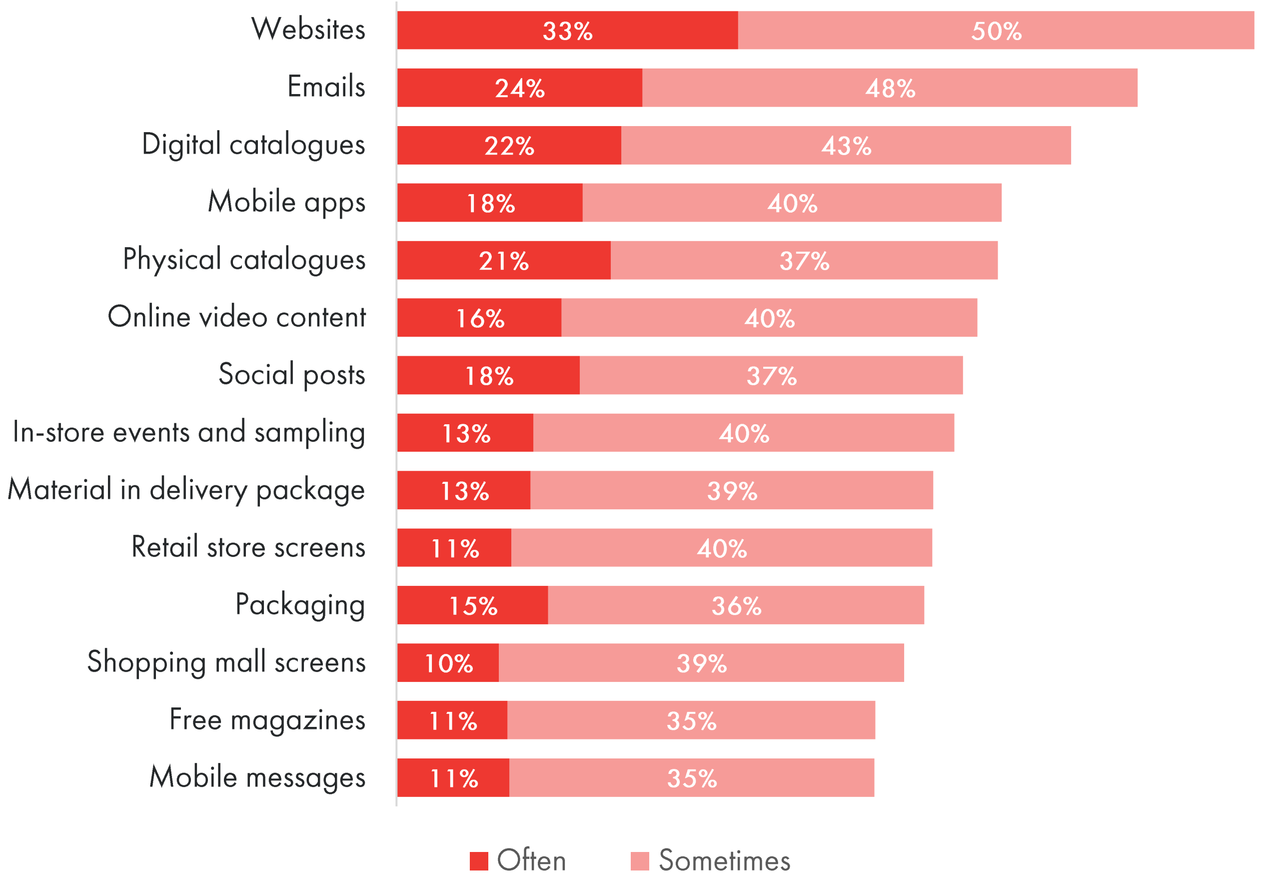
retail marketing and data exchange

04. retail marketing & data exchange

owned digital channels lead retail media engagement

Websites, email and digital catalogues are the retailer touchpoints Australians read and look at most often.



83%

read or look at retailer websites often or sometimes — the top retail media channel.

digital-first, but physical lingers

Owned digital media dominates attention, yet catalogues, packaging inserts and in-store moments still reach over half of shoppers.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How often do you read or look at content produced and distributed by retailers in the following ways?

retail websites and apps reach almost every australian

popular online retail and commerce subcategories, May 2026 (audience, millions)

19.3m
consumer electronics

17.5m
grocery / supermarkets

15.6m
dept & discount stores

15.1m
fast food & delivery

14.9m
fashion & beauty

14.7m
homes & gardens

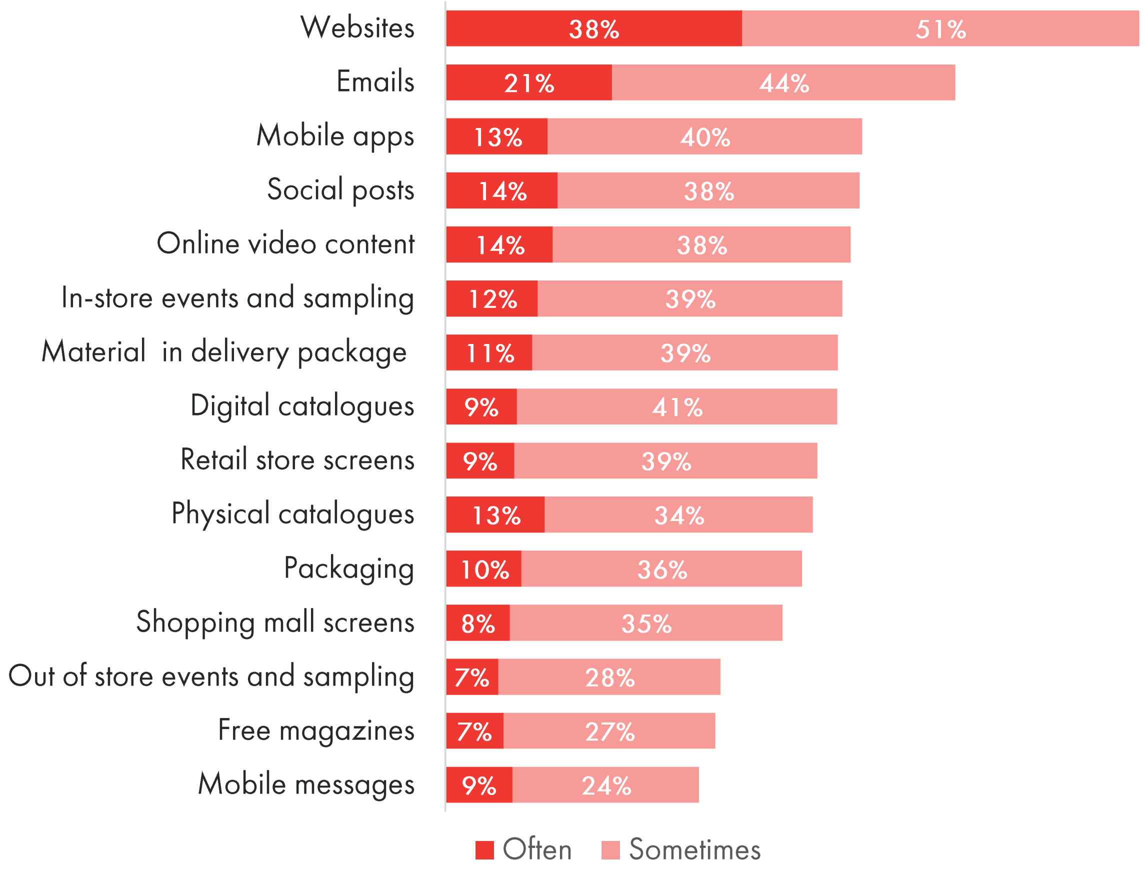
22.2m

Australians aged 14+ visited a retail or commerce site or app in May 2026, 98% of the online population.
On average, Australians spent almost 8 hours per person on retail and commerce websites and apps in May.

Source: Ipsos iris Online Audience Measurement Service May 2026, age 14+, PC/laptop/smartphone/tablet, audience (000s), audience reach %, avg minutes per person, Retail & Commerce Category and selected subcategories

owned digital channels lead retail media engagement

Websites, email and digital catalogues are the retailer touchpoints New Zealanders read and look at most often.



89%

read or look at retailer websites often or sometimes — the top retail media channel.

digital-first, but physical lingers

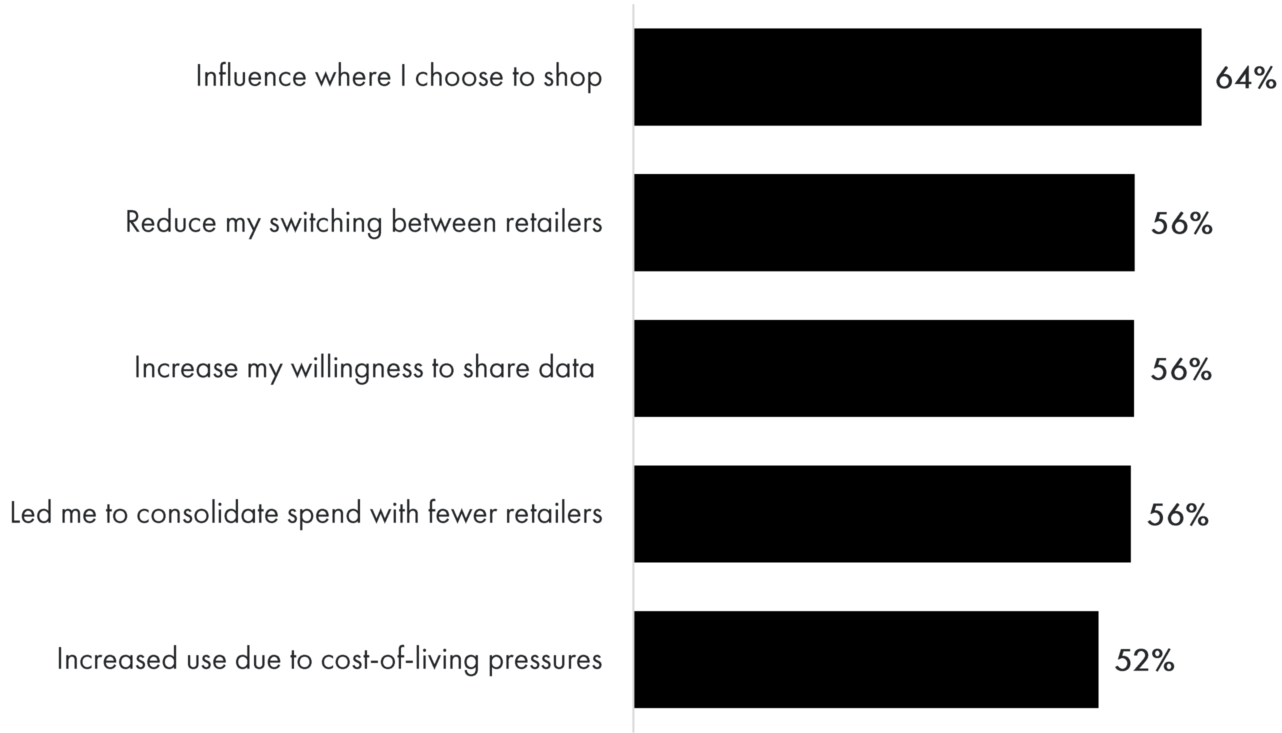
Owned digital media dominates attention, while catalogues, in-store events and delivery inserts still reach around half of shoppers.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How often do you read or look at content produced and distributed by retailers in the following ways?

loyalty programs steer where australians shop

Loyalty programs do reinforce loyalty to a retailer, steer where Australians shop and increase willingness to share data with retailers.

how loyalty programs influence shoppers (% agree)



64%

of online shoppers agree that retail loyalty programs influence where they chose to shop.

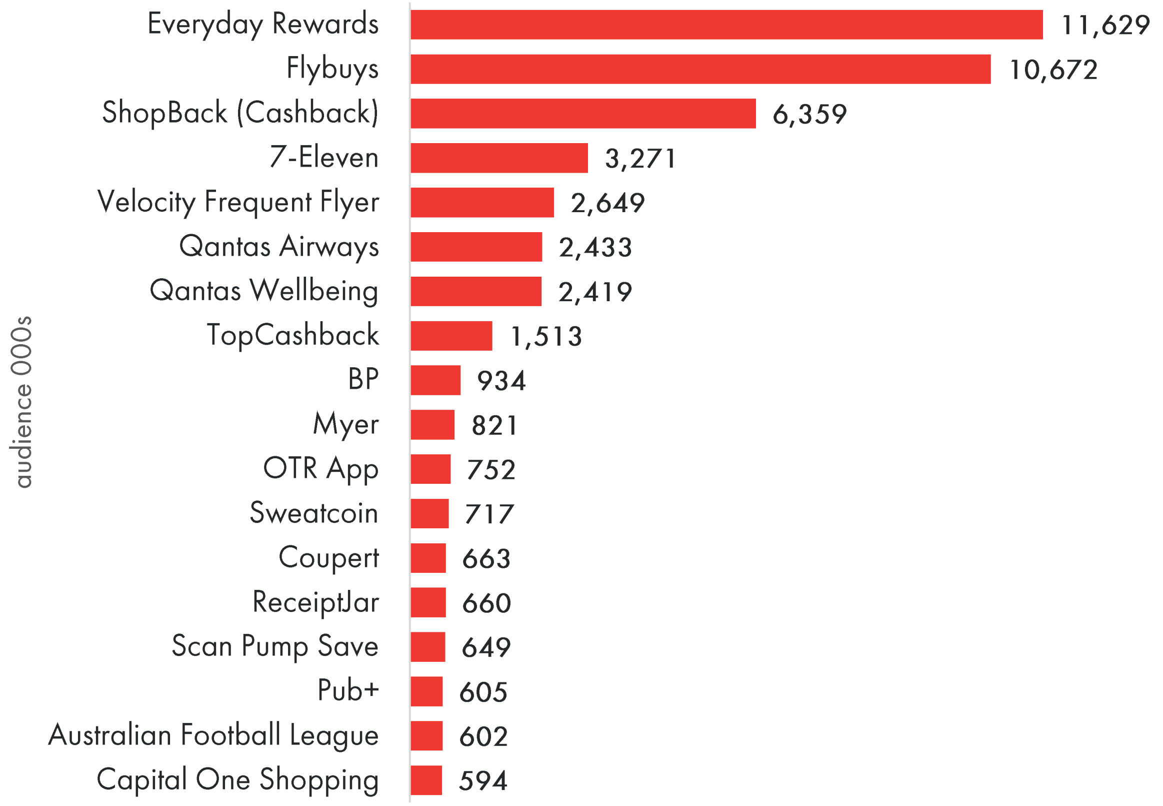
willingness to share data

For 63% of online shoppers aged 18-49, loyalty programs increase willingness to share personal and behavioural data in exchange for benefits, compared to 43% of online shoppers aged 50-70. Retailers will need to work harder on communicating benefits to over 50s.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - How much do you agree or disagree with the following statements about brand or retailer loyalty programs, membership or shopper rewards

loyalty and cashback programs are popular with australians

selected retail loyalty, rewards and cashback brands
(audience 000s May 2026)



17.5 million

australians used a retail reward, loyalty, cashback or voucher website or app in May 2026.

supermarket rewards dominate

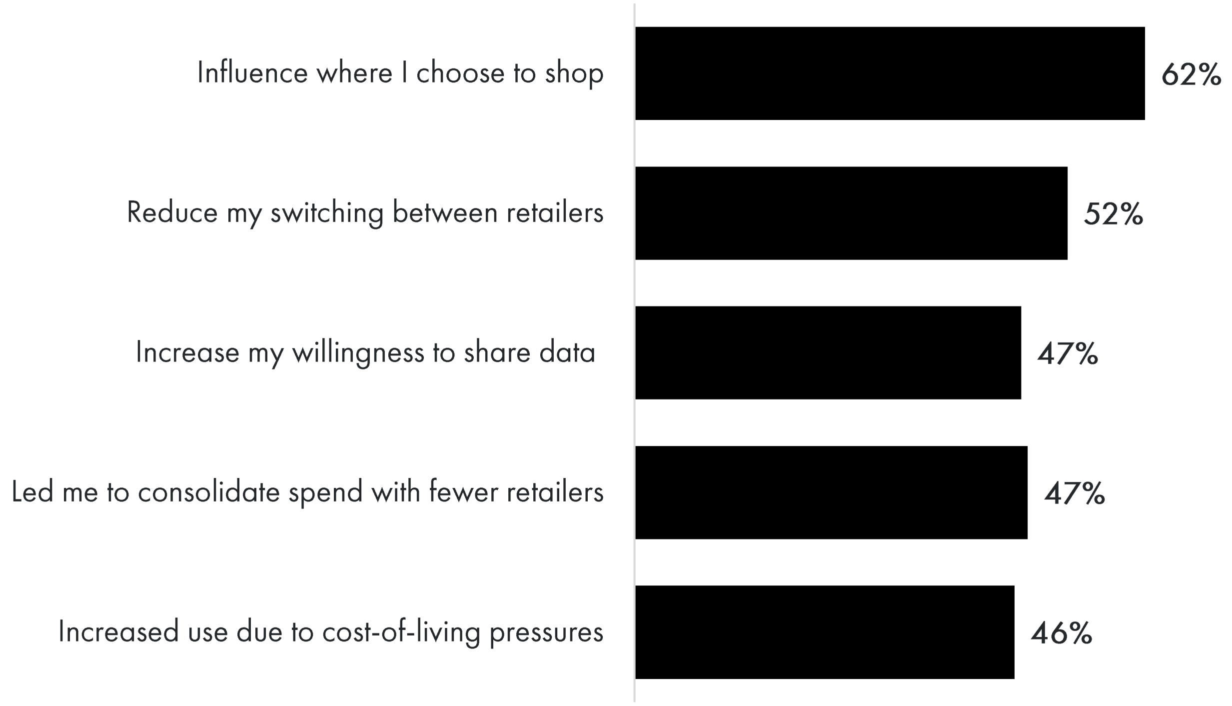
Nearly 15 million Australians used either or both or the top supermarket rewards websites or apps (Everyday Rewards or Flybuys) in May 2026.

Source: Ipsos iris Online Audience Measurement Service May 2026, age 14+, PC/laptop/smartphone/tablet, audience (000s), Vouchers/Cashback and Rewards/Loyalty selected Brand Groups

loyalty programs steer where new zealanders shop

Loyalty programs do reinforce loyalty to a retailer, steer where New Zealanders shop and increase willingness to share data with retailers.

how loyalty programs influence shoppers (% agree)



62%

of online shoppers agree that retail loyalty programs influence where they chose to shop.

willingness to share data

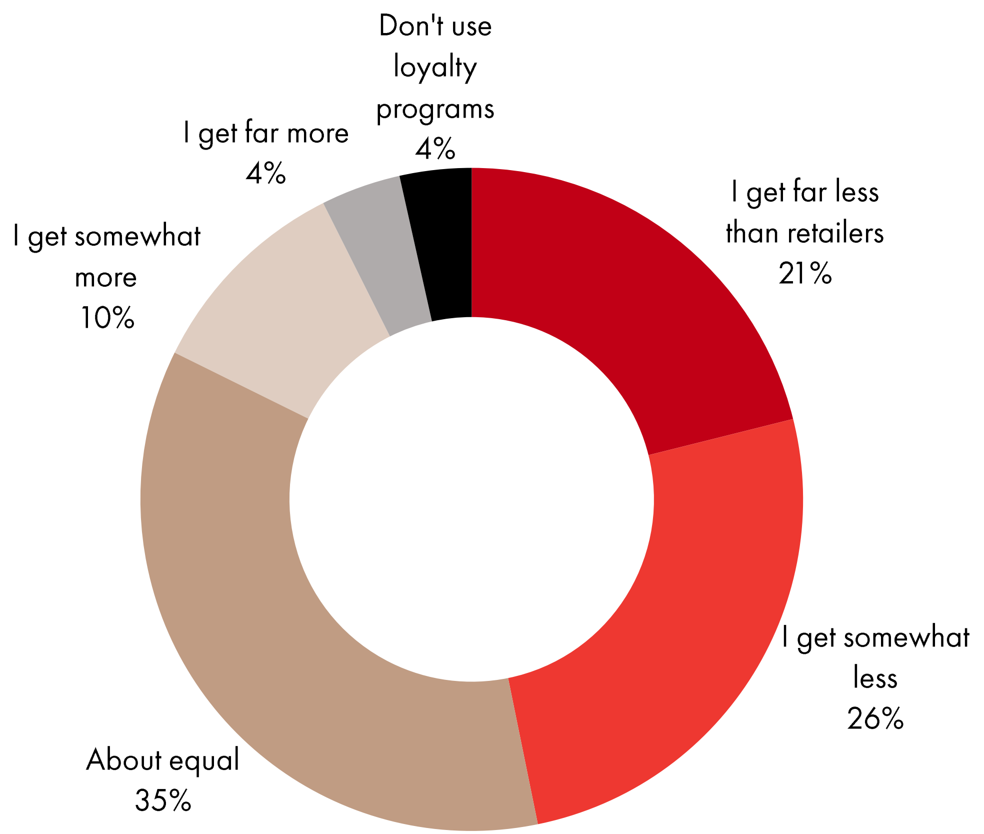
For 54% of online shoppers aged 18-49, loyalty programs increase willingness to share personal and behavioural data in exchange for benefits, compared to 34% of online shoppers aged 50-70. Retailer will need to work harder on communicating benefits to over 50s.

Source: Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How much do you agree or disagree with the following statements about brand or retailer loyalty programs, membership or shopper rewards

loyalty shapes behaviour, but value is questioned

Loyalty programs steer where Australians shop, yet nearly half of online shoppers feel the value they get back is less than what retailers gain.

perceived value exchange in loyalty programs



96%

of online shoppers use retail loyalty programs.

Retailer loyalty programs depend on a perceived value exchange

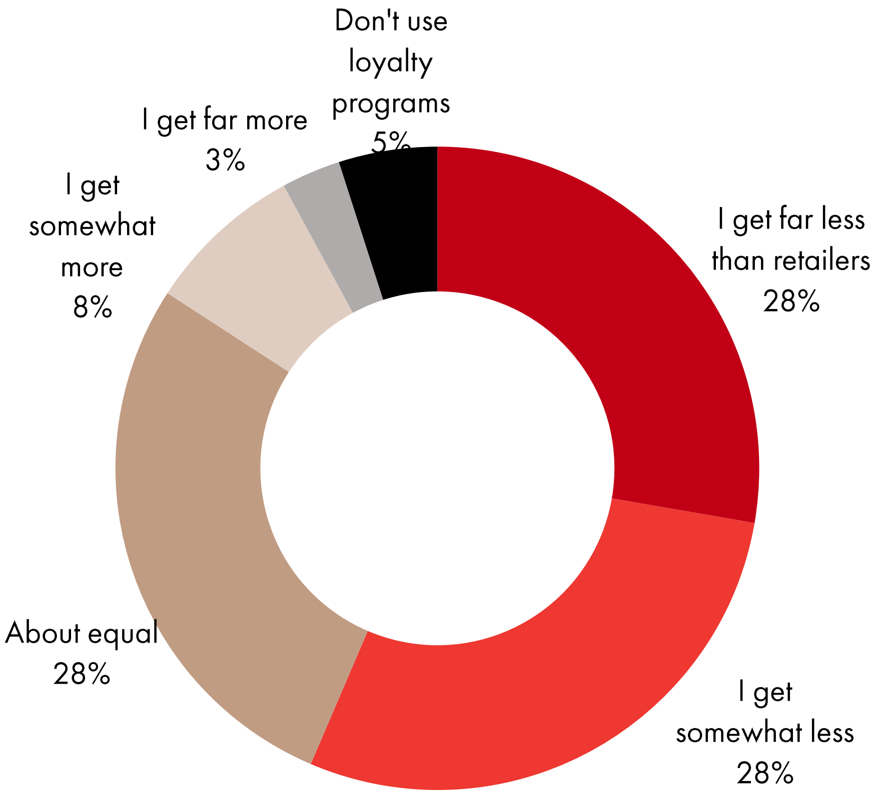
47% of online shoppers (53% of online shoppers aged 50-70's) say the value is not in their favour, that retailers get more value than they do. When consumers believe that the exchange is unfair, retailers risk lower participation, weaker customer relationships, poorer data quality, and reduced commercial value from both loyalty and retail media activities.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Do you believe the benefits you receive from brand or retailer loyalty programs, membership or shopper rewards programs are proportional to the value retailers gain from your data and purchases?

loyalty shapes behaviour, but value is questioned

Loyalty programs steer where New Zealanders shop, yet over half of online shoppers feel the value they get back is less than what retailers gain.

perceived value exchange in loyalty programs



95%

of online shoppers use retail loyalty programs.

Retailer loyalty programs depend on a perceived value exchange

56% of online shoppers say the value is not in their favour, that retailers get more value than they do. This is far greater than the 47% of Australian online shoppers who feel this way.

When consumers believe that the exchange is unfair, retailers risk lower participation, weaker customer relationships, poorer data quality, and reduced commercial value from both loyalty and retail media activities.

Source: Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - Do you believe the benefits you receive from brand or retailer loyalty programs, membership or shopper rewards programs are proportional to the value retailers gain from your data and purchases?

shoppers want tangible, everyday value for data

There are a range of benefits online shoppers see as adequate compensation in exchange for sharing data with retailers. Practical, money-saving benefits are seen as fair exchange for data.

58%

of online shoppers see member prices and discounts as fair compensation for providing data to retailers.

the fair-value test

Discounts, free delivery and cash back clear the bar. Online shoppers aged 18-39 are slightly more likely to value other non-monetary benefits such as experiential and content perks.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - Which of the following benefits do you value as adequate compensation in exchange for the personal data you share with retail businesses?

shoppers want tangible, everyday value for data

There are a range of benefits online shoppers see as adequate compensation in exchange for sharing data with retailers. Practical, money-saving benefits are seen as fair exchange for data.

67%

of online shoppers see member prices and discounts as fair compensation for providing data to retailers.

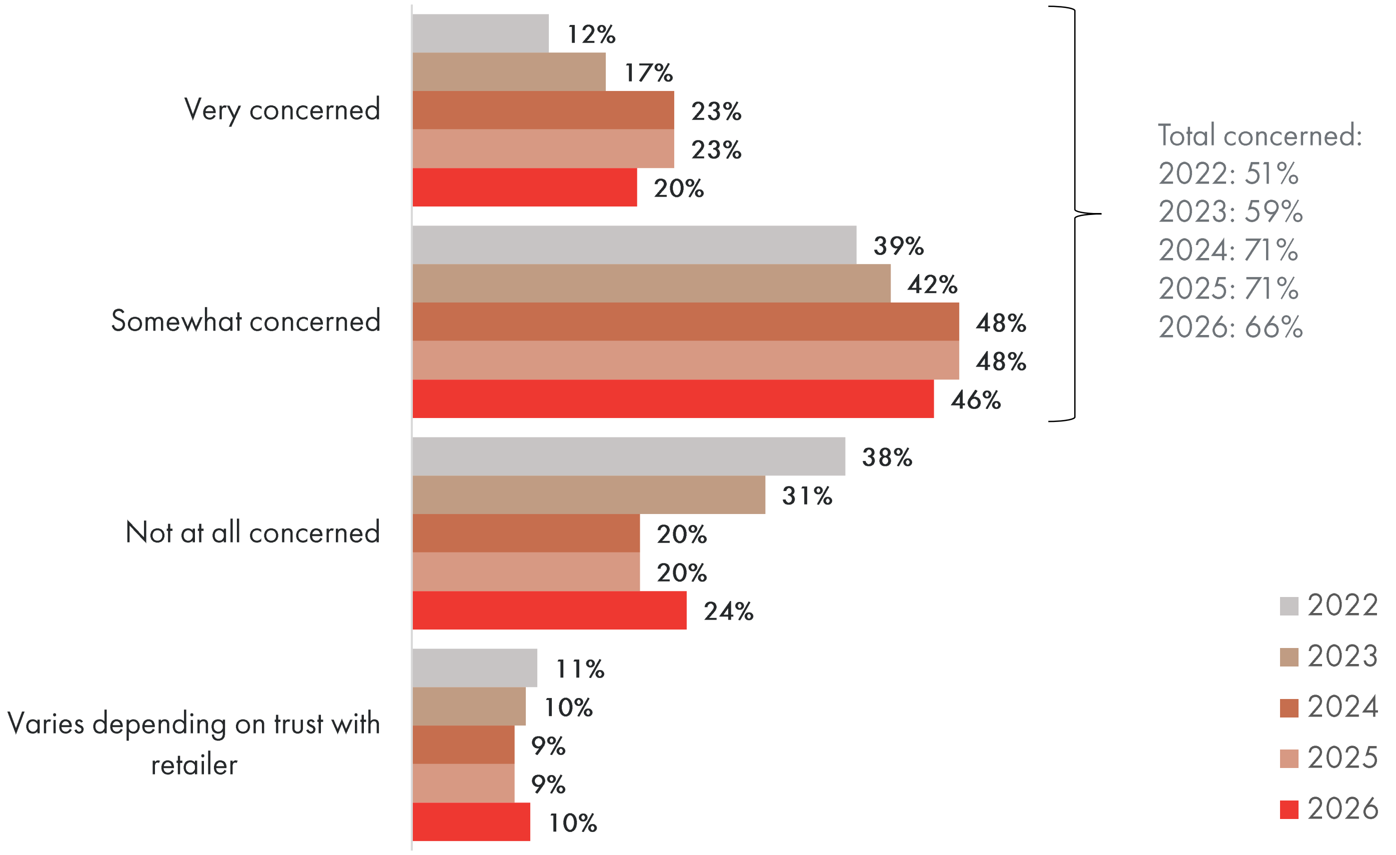
the fair-value test

Discounts, free delivery and cash back clear the bar. New Zealand online shoppers are even more motivated by money saving benefits than Australians, with 67% valuing member prices and discounts compared to 58% in Australia.

Source: Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - Which of the following benefits do you value as adequate compensation in exchange for the personal data you share with retail businesses?

concern for how retailers use shopper data

Most online shoppers remain concerned about how retailers use the data they provide to them via loyalty programs.



66%

of online shoppers are at least somewhat concerned about how retailers use the data they provide via loyalty and reward programs.

slight drop in concern

The proportion of online shoppers concerned about how retailers use the data they provide to them has dropped -5% pts year on year (from 71% in 2025 to 66% in 2026).

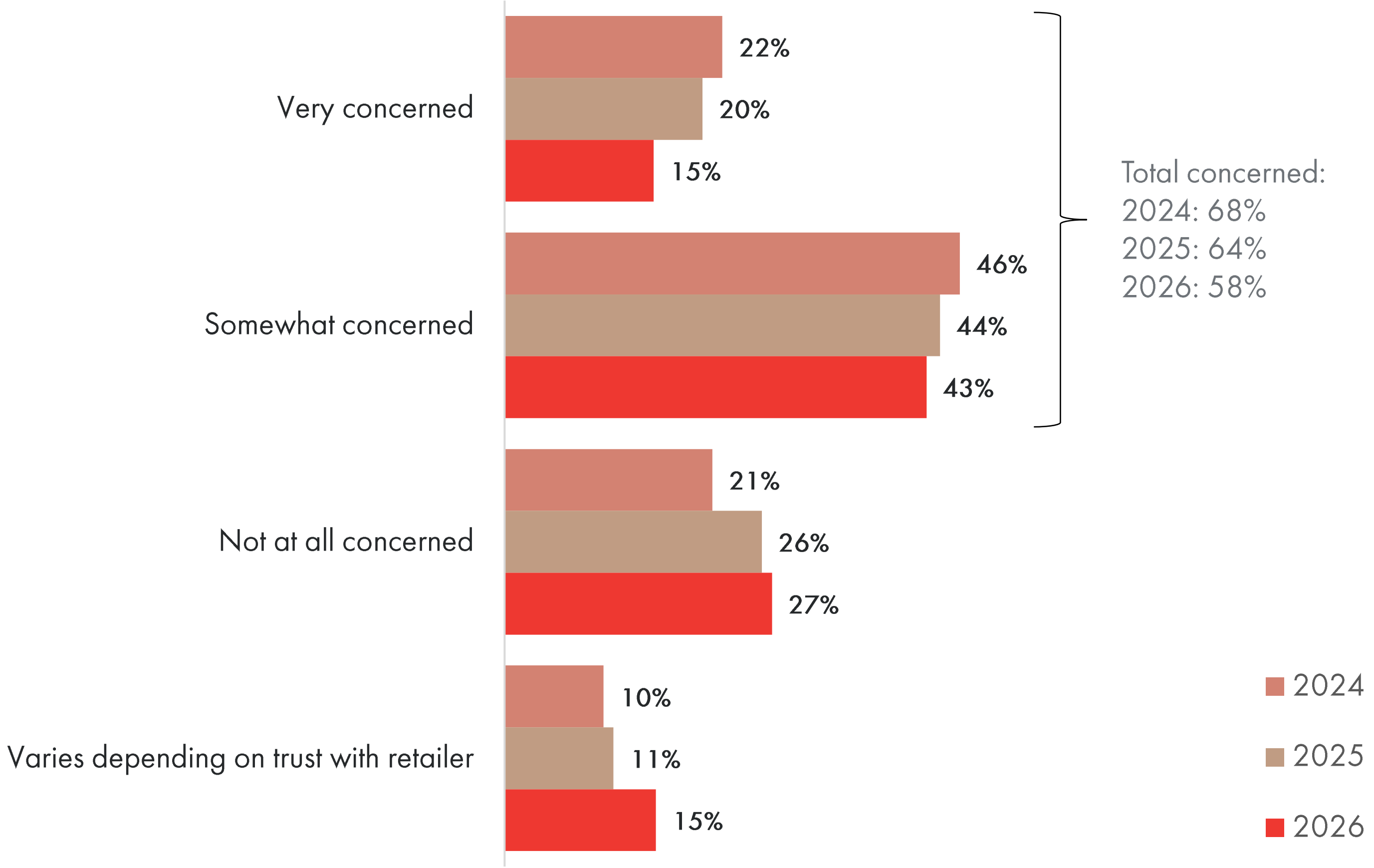
The key loyalty demographic of online shoppers aged 30-39 have the greatest level of concern (74%).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079

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

concern for how retailers use shopper data

Most online shoppers remain concerned about how retailers use the data they provide to them via loyalty programs.



58%

of online shoppers are at least somewhat concerned about how retailers use the data they provide via loyalty and reward programs.

drop in concern

The proportion of online shoppers concerned about how retailers use the data they provide to them has dropped -6% pts year on year (from 64% in 2025 to 58% in 2026).
Concern is lower in New Zealand than in Australia (58% concerned in New Zealand compared to 66% concerned in Australia).

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - How concerned are you about how retailers use the data about you that you provide to them via the loyalty program/reward?

most australians are clear-eyed about data use

Shoppers broadly understand what retailers do with their data with awareness of targeting, tracking and profiling high amongst online shoppers.

77%

of online shoppers know their data is used to target advertising to them.

transparency is the opportunity

With awareness this high, the differentiator is trust and demonstrating clear value and responsible data to win permission.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, Australia Wave 6, 2026. Base: n=1,079
Q - What do you think the retailers do with the data you are providing them via loyalty cards, transactions or online behaviour?

most new zealanders are clear-eyed about data use

Shoppers broadly understand what retailers do with their data with awareness of targeting, tracking and profiling high amongst online shoppers.

73%

of online shoppers know their data is used to target advertising to them.

transparency is the opportunity

Awareness of retailer uses of data is lower amongst New Zealand online shoppers than in Australia. Retailers need to ensure they are using clear communication around the data value exchange and transparency on how data is used, to make shoppers more comfortable to share data.

Source: IAB Australia & Pureprofile Consumer Retail & Discovery Report, New Zealand Wave 3, 2026. Base: n=877
Q - What do you think the retailers do with the data you are providing them via loyalty cards, transactions or online behaviour?

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For previous waves and the full IAB Australia research program, visit the IAB Australia website.

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