



Trends in Marketplaces & Classifieds

Digital Marketplaces Conference

May 2025



OC&C
Strategy consultants



We have deep knowledge of marketplaces

Lead Generation Marketplaces

Property, Home Services, Auto, Jobs

Adevinta  Auto Scout24 

Schibsted  axel springer 

Utilities & Financial

Money Super Market  smava 

compare themarket 

Product & Service Marketplaces

Products

3P Commerce

Vestiaire Collective  bol.  NOT ON THE HIGH ST.  allegro  amazon 

2nd Hand / Refurbished

refurbed  world of books  SBF  mpb.com 

SHPOCK  Vinted 

Auctions

TBAUCTIONS  ebay 

atg AUCTION TECHNOLOGY GROUP 

Services

Travel & Leisure

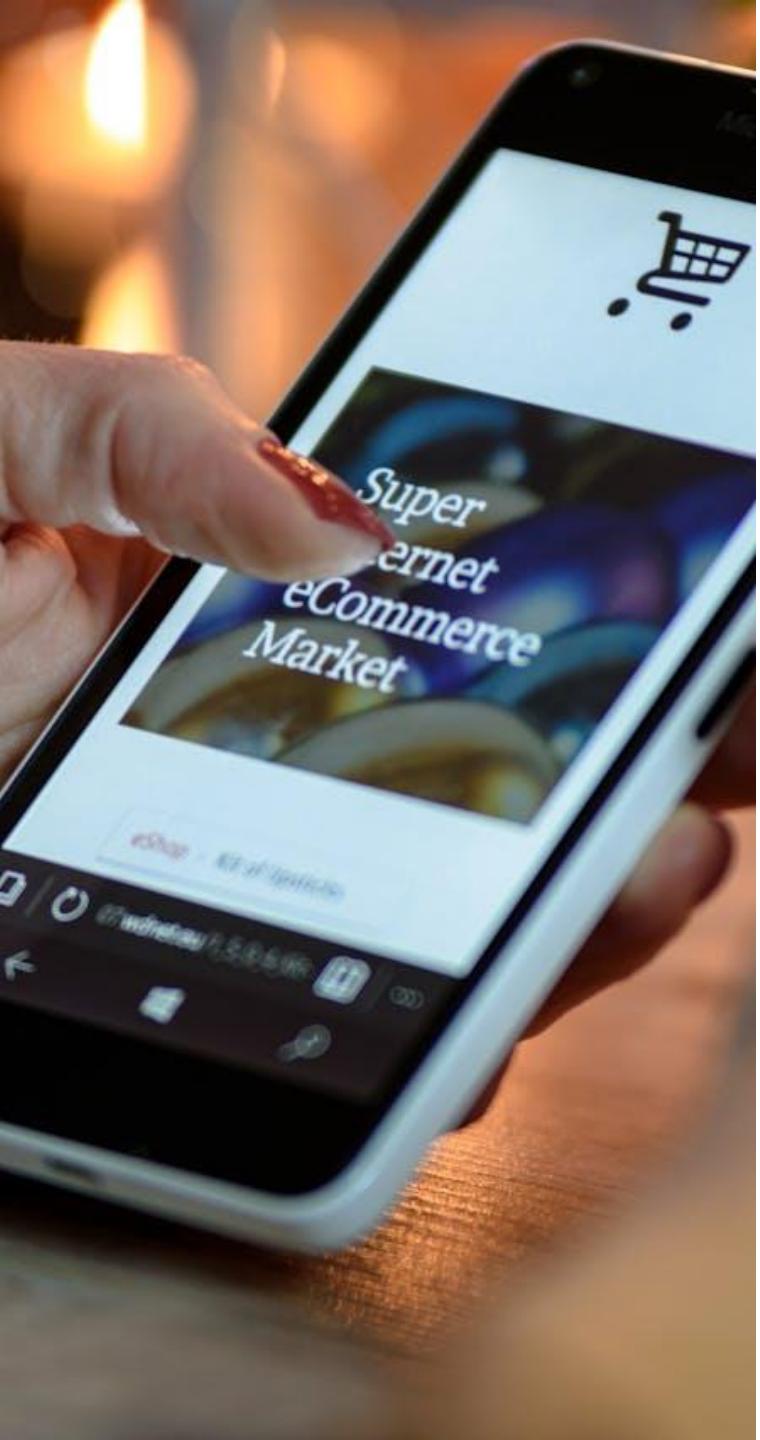
eDreams  HolidayCheck  FLiXBUS  Booking.com  enchanting TRAVELS  cruise.co.uk  GET YOUR GUIDE  lastminute  KIWI.COM  skyscanner  loveholidays 

Gyms

Gympass  ZWIFT 

Other

bark  treatwell  Meituan  Trusted Housesitters 



Despite a more challenging macro backdrop, there is plenty of opportunity yet for marketplaces

Digital Marketplace Themes

Challenging Growth Backdrop

Slower growth in consumer spending and marketplace penetration post-covid

Hyper-Verticalization of Marketplaces

A real trend in recent years to target specific products and customer segments more effectively

Proposition & Pricing Innovation

Building momentum into the growth of the marketplace to realise the 'winner takes most' outcome

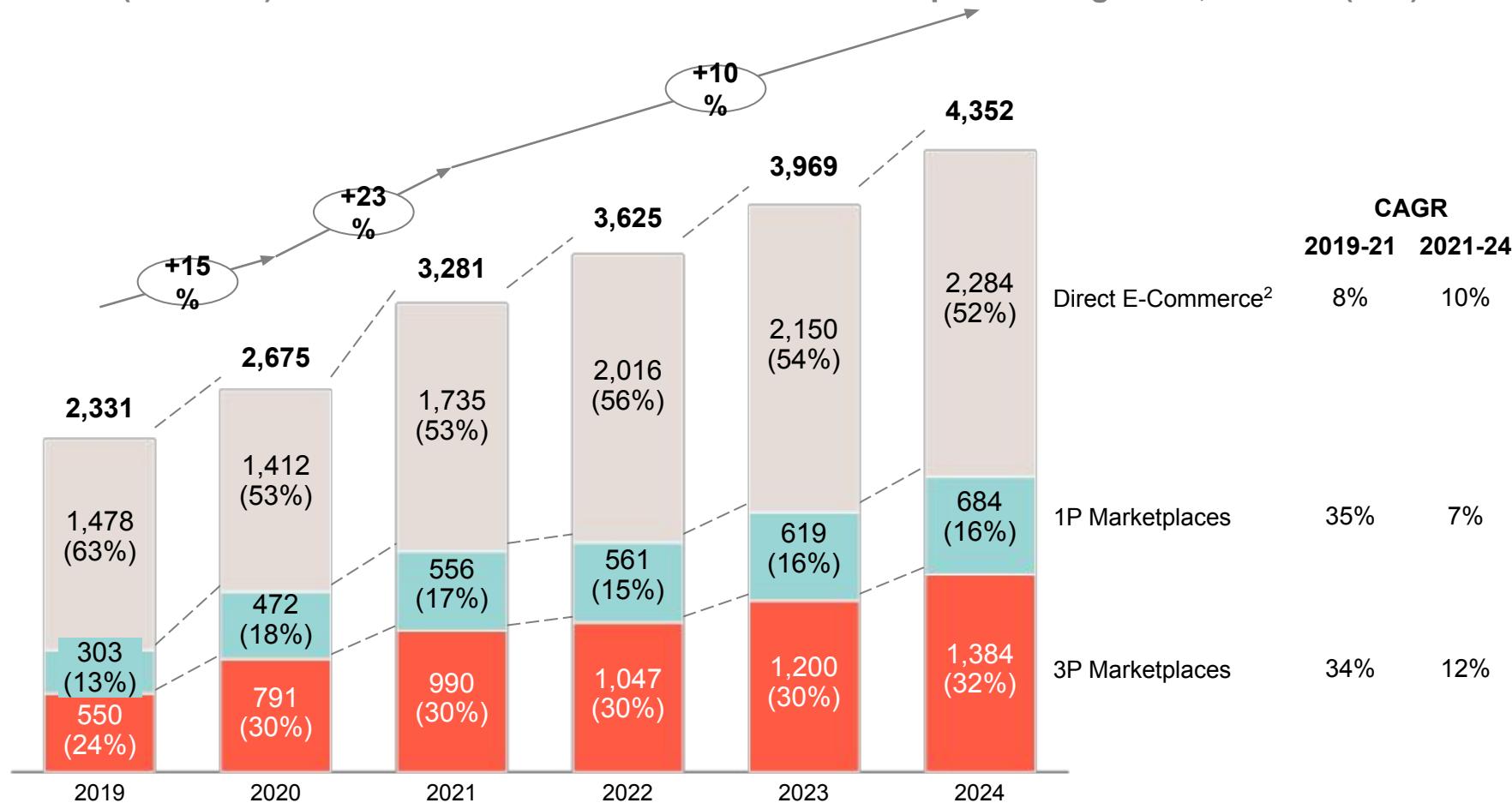
Excitement about New Revenue Streams

Expand from monetisation of core product to unlock new pools of spend from existing and new audiences

Marketplace growth has moderated in recent years but remains robust; sustained growth to 2030 would give a \$300bn opportunity in Europe alone

Global (ex China) GMV in Established Product-Based Marketplace Categories¹, 2019-24 (\$bn)

Fixed Exchange Rates



Continued growth at the 2021-24 trajectory would yield additional consumer spend on 3P marketplaces of **\$300bn by 2030 in Europe**

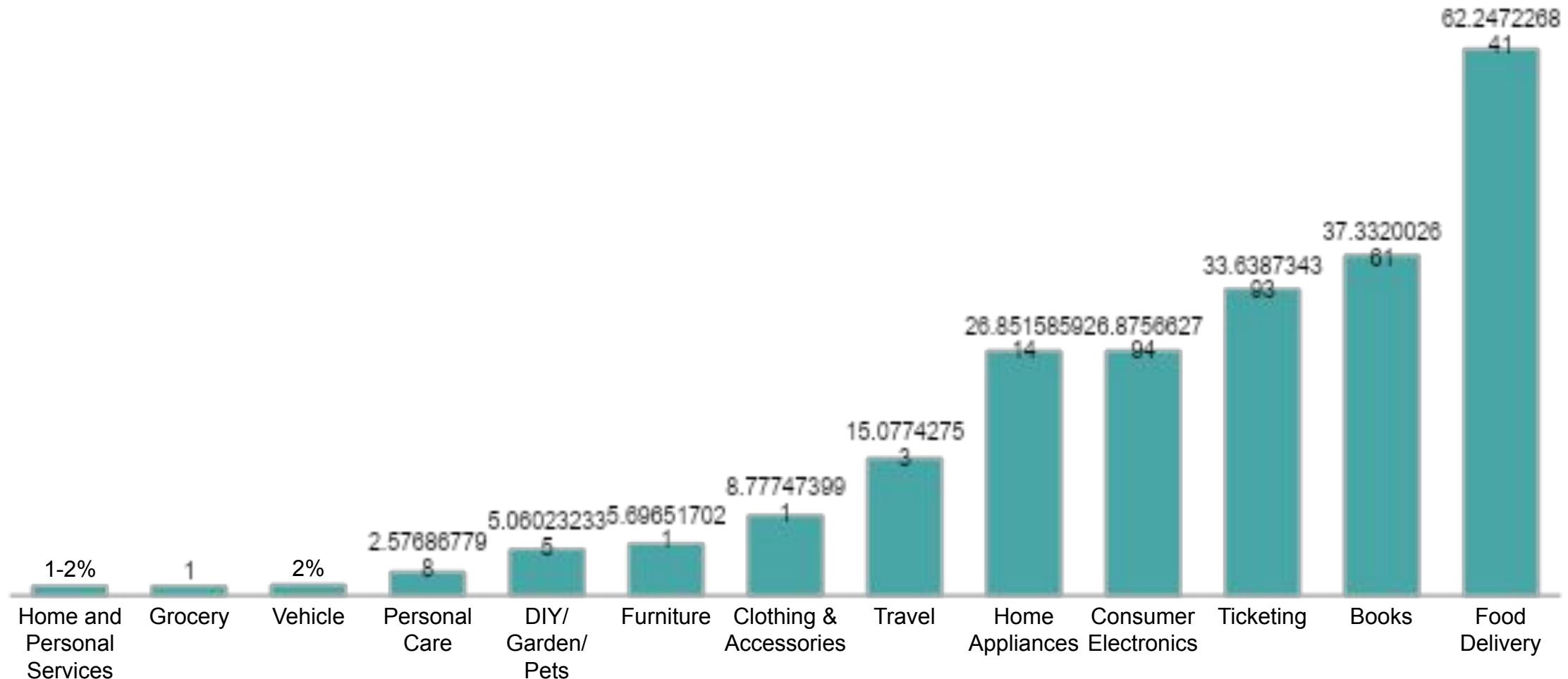
1. Includes Books, Food Delivery, Ticketing, Travel / Vacation, Consumer Electronics, Furniture / Homeware, Home Appliances, Clothing, DIY / Gardening / Pets, Personal Care, Grocery and Other

2. E-commerce direct is first hand only

Source: GlobalData, Euromonitor, eMarketer, Digital Commerce 360, Statista, ECommerceDB, PwC Media Outlook, Desk Research, OC&C analysis

Opportunities still exist; marketplace penetration varies by category and there is headroom in many areas

Estimated Share of Spend Through Marketplaces by Category (Global ex China, % Share of Spend)



Marketplaces are evolving how they drive momentum in 6 different ways

Marketplace Trends Today

Examples

	Hyper-Verticalization	Examples		
Proposition Innovation		 Sandhills Global		
	Highly Customised Propositions			
	Trust-Based Models			
	AI Turbocharging Propositions			
	Pricing Innovation			
	Adjacent Product Development			
				

Marketplaces focused on specific sub-verticals has been a clear trend in recent years, enabling highly tailored buyer + seller experience

Case Studies Summary



Sandhills Global

Group of industry-specific marketplaces, catering to specific niches (e.g., trucks, tractors, farming)

Marketplaces **hyper-specialised to industry niche**; split across categories, buy it now vs auction, and buy vs rent

 Machinery Trader	 TractorHouse	 TruckPaper
 AuctionTime	 Equipmentfacts	 AuctionValues
 MarketBook	 OtherStock	 RentalYard



Peer-to-peer clothing marketplace, focused on second-hand, vintage and streetwear

Targets **specific age groups and fashion segments** (~60% of audience under 35) with UI and discovery-based UX

Shop by style

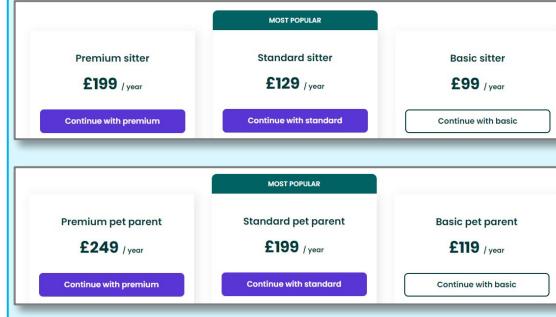




TrustedHousesitters™

Mutual exchange marketplace connecting vetted sitters with pet / homeowners

Hyper-focused on trust, lifestyle and community with a specific subscription-based business model



MOST POPULAR		
Premium sitter £199 / year	Standard sitter £129 / year	Basic sitter £99 / year
Continue with premium	Continue with standard	Continue with basic

MOST POPULAR		
Premium pet parent £249 / year	Standard pet parent £199 / year	Basic pet parent £119 / year
Continue with premium	Continue with standard	Continue with basic

Hyper-vertical marketplaces grew at 36%pa 2019-23 with 34 of these reaching \$1bn in GMV globally

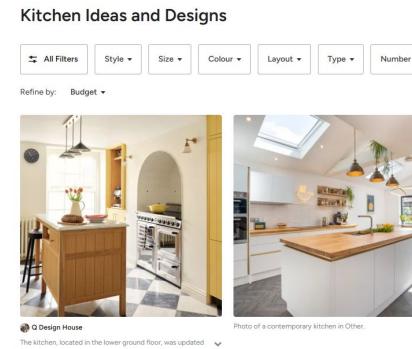
Taking this further – several marketplaces have highly tailored propositions to attract both buyers and sellers

Case Studies Summary

Attracting Buyers to Site



Houzz developed a home **design inspiration offer** to attract consumers to site – where they are prompted with the monetizable marketplace proposition ‘suggest pros for me’



Attracting & Retaining Quality Sellers



Language tutoring platform **provides tutors with an integrated calendar and lesson scheduling tool** –enables high quality, verified tutors to charge a premium

Make a living by teaching the largest community of learners worldwide

1 Sign up to create your tutor profile

2 Get approved by our team in 5 business days

3 Start earning by teaching students all over the world

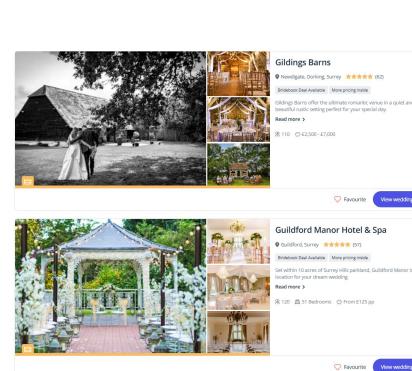
Create a tutor profile now

Teach anytime, anywhere

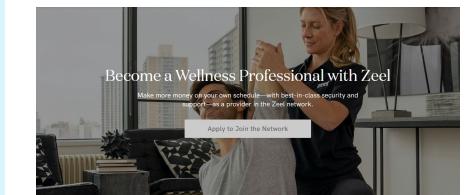
Grow professionally



Bridebook markets itself first as a **free wedding planner** – then monetises visitors through connecting them to wedding suppliers and venues



As an in-home massage service marketplace, Zeel offers its professionals **in-time & transparent payment, built-in safety protection, easy schedule, & referral programs**



Become a Wellness Professional with Zeel

Make more money on your own schedule – with best-in-class security and support – as a provider in the Zeel network

Apply to Join the Network

Join 12,000+ Practitioners Bringing Transformative Care Directly to Patients



Trust-based models are also becoming increasingly prevalent to drive conversion

Case Studies Summary

Vetting & Insurance

Platforms pre-vet providers through background checks, licenses, and insurance – often backed by guarantees

Back Market

Checkatrade

 TaskRabbit

Training & Interviews

Providers complete training, interviews, and assessments before offering services

 58同城

URBAN wellness™

Vehicle Inspections & Warranties

Platforms offer inspections, history reports, and warranties for high-value vehicle sales

AutoScout24

 smyle



CARVANA

Product Authentication

Items are verified before delivery – essential for high-value or fraud-prone goods like watches or bags

 ebay

 Vestiaire Collective

 Chrono24
The World's Watch Market

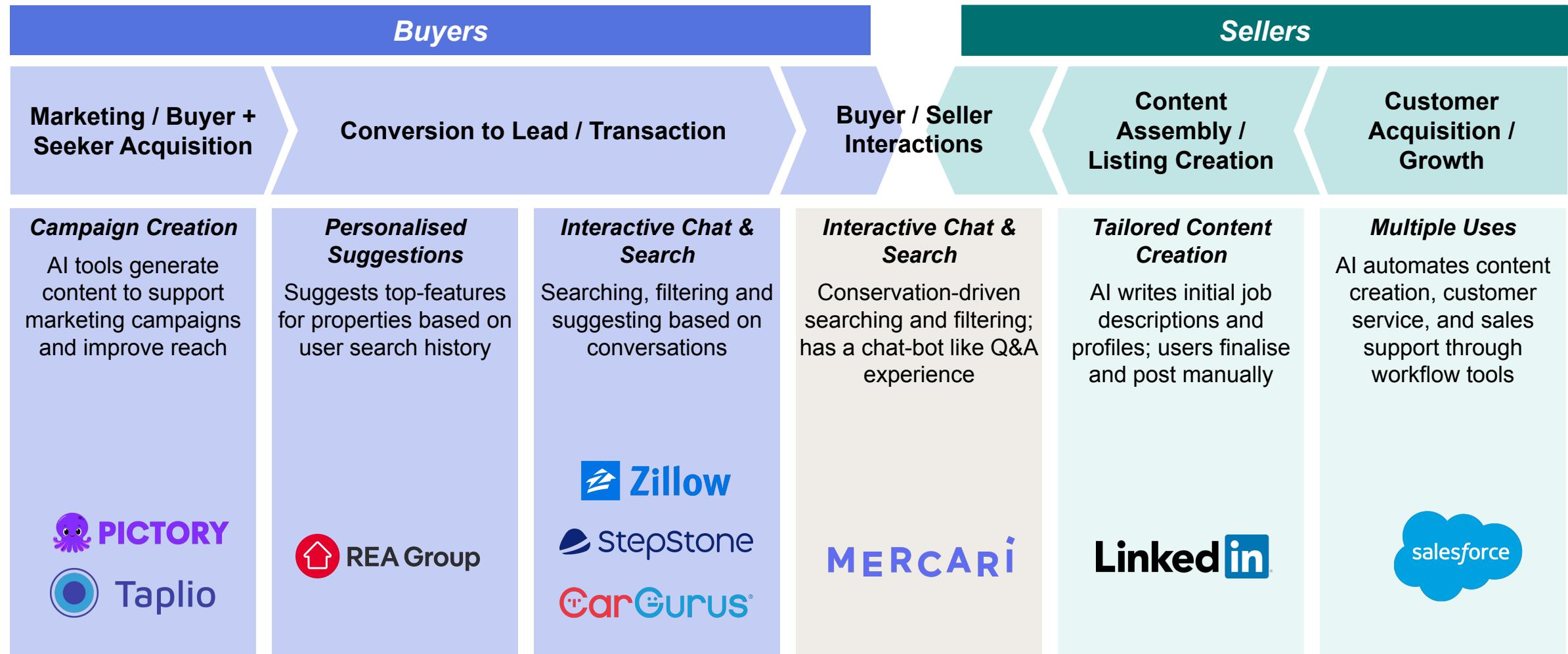
Applicant Verification

Candidates' qualifications can be pre-verified, improving hiring efficiency and reducing risk (was trialled by Seek)

 seek

AI's impact has so far had incremental impact on improving marketplace propositions

AI Use Cases In Classifieds Today

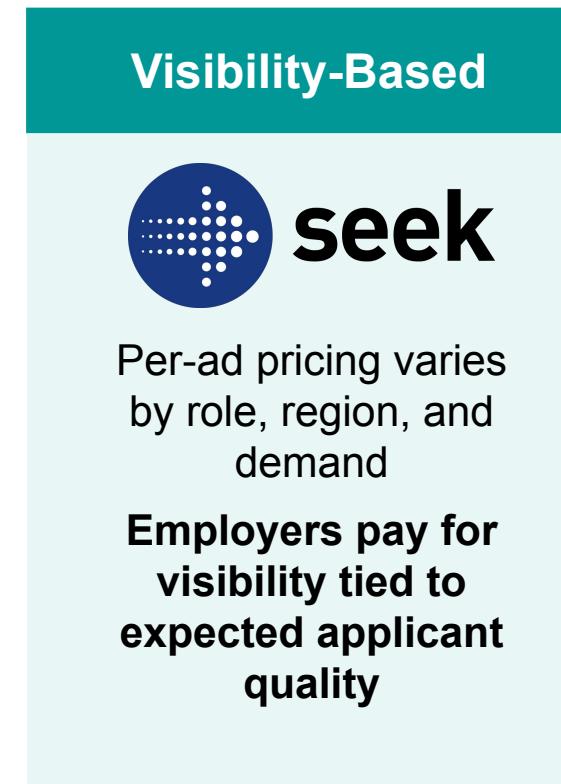
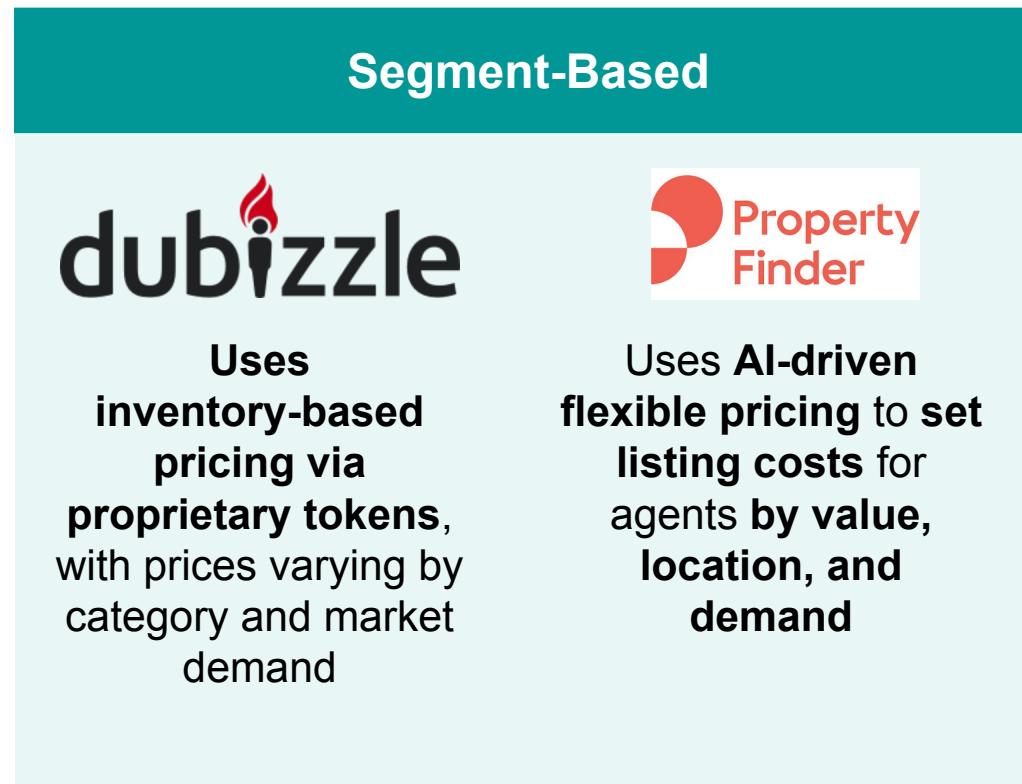


Pricing remains an important lever for growth – classifieds have shown how innovative pricing models can be successful

Innovative Pricing Models

*Increasing
Proximity to
Transaction*

Pricing Models for Core Listings Products Only



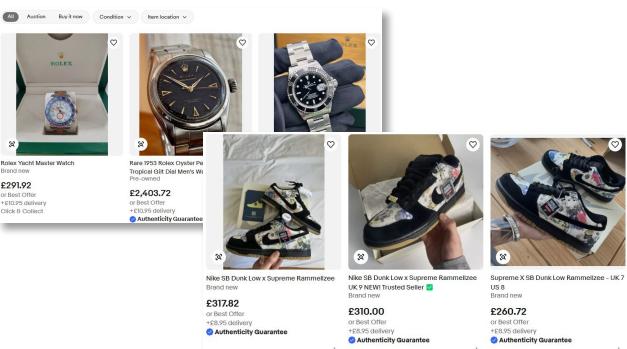
Several marketplaces show that it's never too late to fundamentally change pricing models

Case Study Overview

Shift to Buyer Commission

ebay

Shifts to **buyer-paid fees** in categories like sneakers and watches, **reducing seller friction and boosting inventory and increasing platform liquidity**.

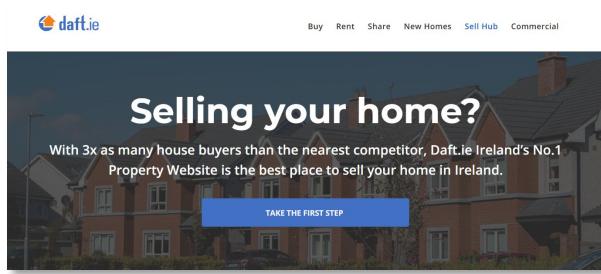


Source: Desk Research, SimilarWeb, Company Websites, OC&C analysis

Shifting to Seller Pay

daft.ie

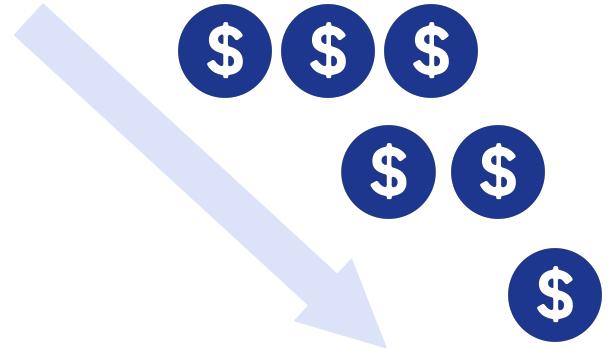
Looking to encourage a **seller-pay model through product tiering and agent incentives**, similar to approaches used by REA and Hemnet.



Supplier Auctions

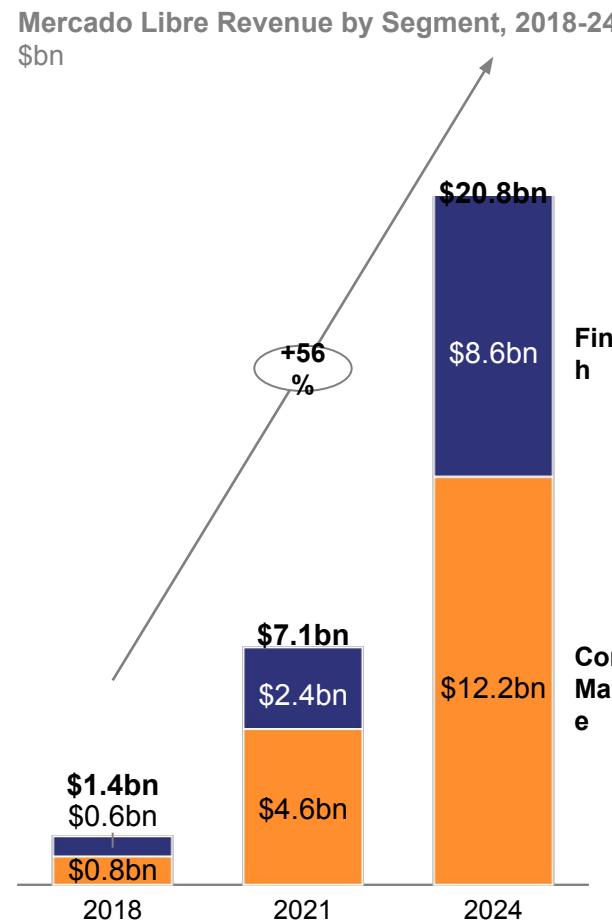
bol.com

Runs “countdown” auctions where **suppliers bid down commission rates to win product placement at lower cost**.

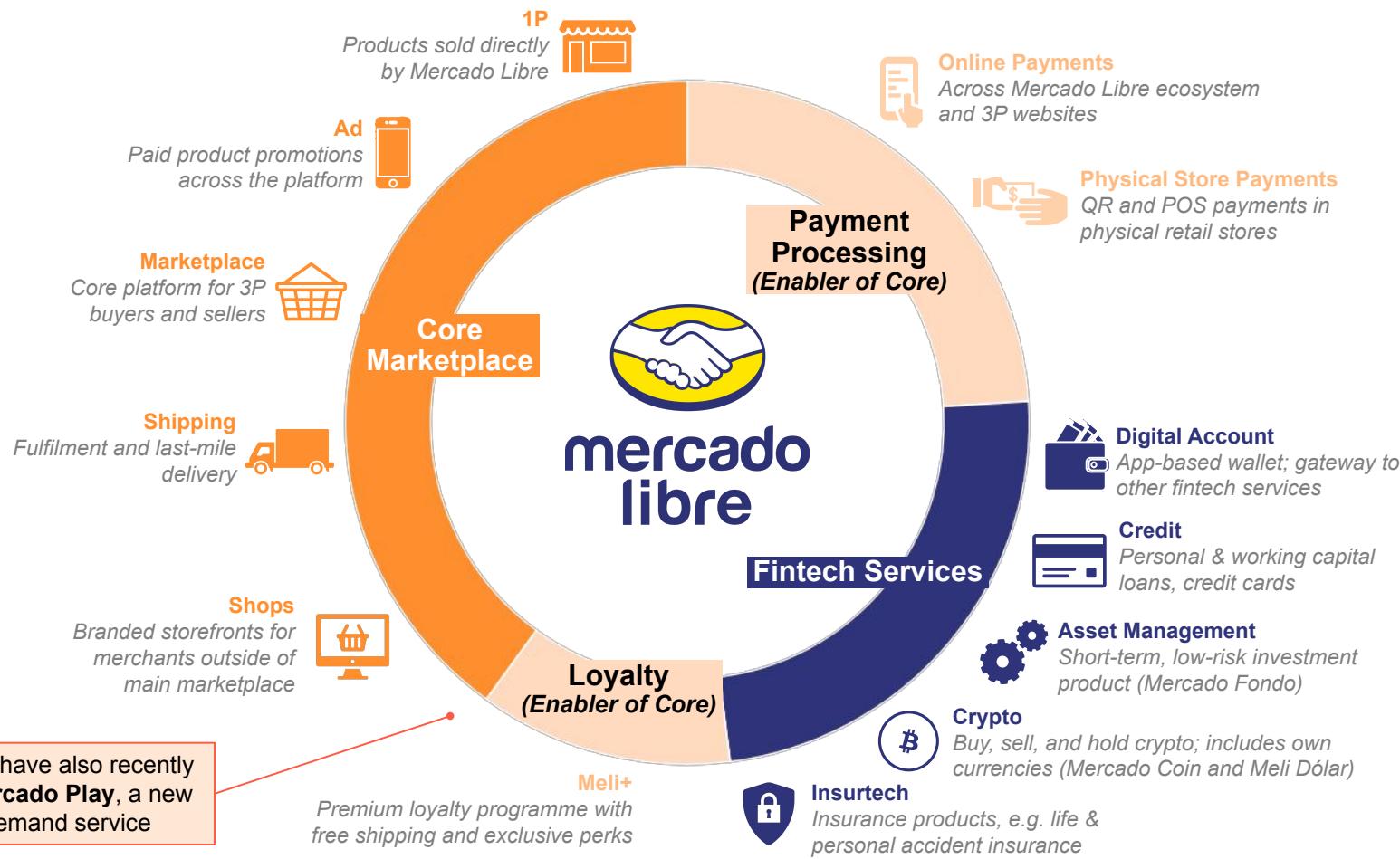


We have seen marketplaces successfully build a suite of adjacent services and revenue streams

Mercado Libre Case Study

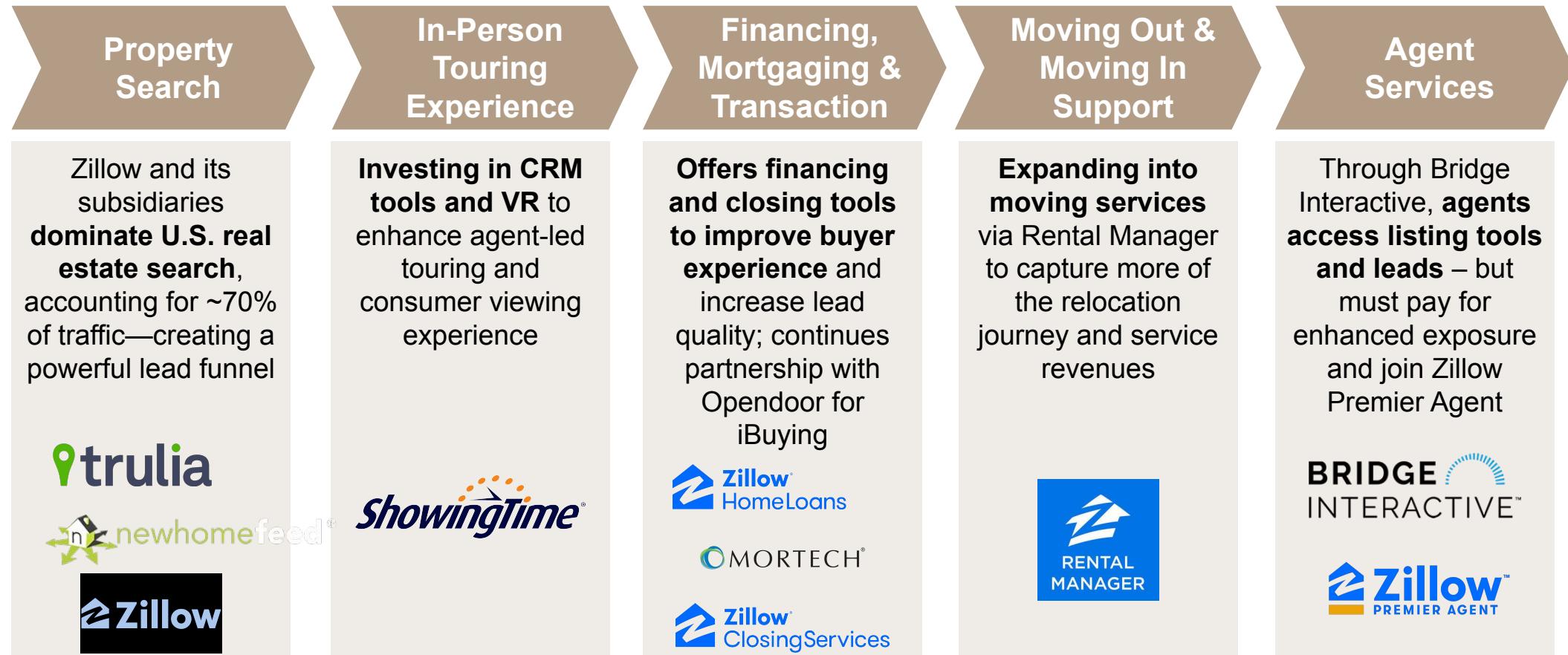


Mercado Libre Ecosystem



Zillow recently focussed on developing a “SuperApp” for seeker needs through the lifecycle

Case Study: Zillow



Recently, off platform / marketing services have been an area of growth

Agent Marketing



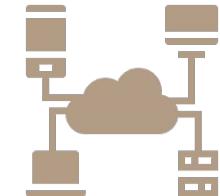
Provides digital marketing services, campaign tools, and market insights for agents



Real Estate Developer Marketing



Full-stack developer solution including pricing insights, tech tools, performance marketing, sales support, and event services



Dealer Marketing



Cars.com platform integrates marketplace listings, digital retail tools, trade-in solutions, and targeted media to dealers



Recruiter Marketing



End-to-end recruitment marketing services including ad creation, multichannel campaigns, employer branding, and content marketing





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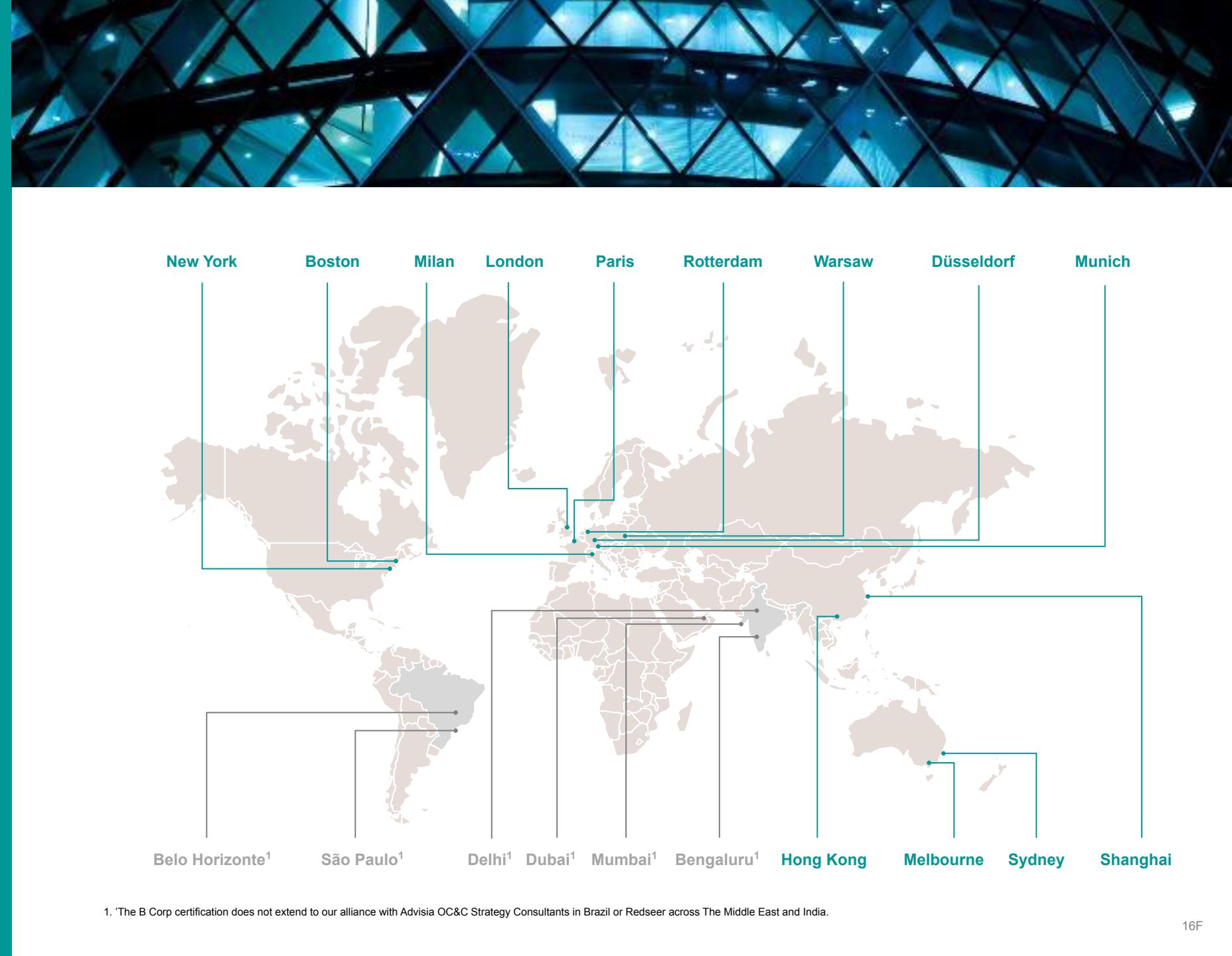


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