



The future of online marketplaces

How the next generation of marketplaces are pushing boundaries and removing remaining barriers, to create seamless experiences for European consumers

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THE MARKETPLACE
CONFERENCE
2018

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Schibsted: a tangible track-record in building and scaling marketplaces and digital services globally

Our brands

- leboncoin
- WILLHABEN
- DoneDeal
- subito
- segundamano
- coches.net
- OLX
- shpock
- fotocasa
- kufar

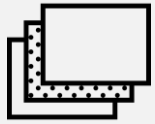


Our reach

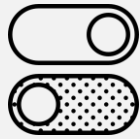
- 22 countries
- 30M+ daily users
- €880M revenues

Schibsted's venture arm supports entrepreneurs beyond money

How we contribute



Scale



Minimize CAC,
Maximize LTV



Support with data and
tools



Knowledgeable partner and
advisor

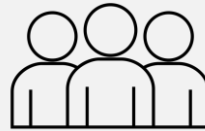
What we look for



Core verticals
(real-estate, mobility, jobs)



Sign of product market-fit and
tangible traction



Solid teams

AIMGROUP

Schibsted hunts startups, invests in Kodit.io



By Lars Herlin
In Financials / Deals, Real Estate

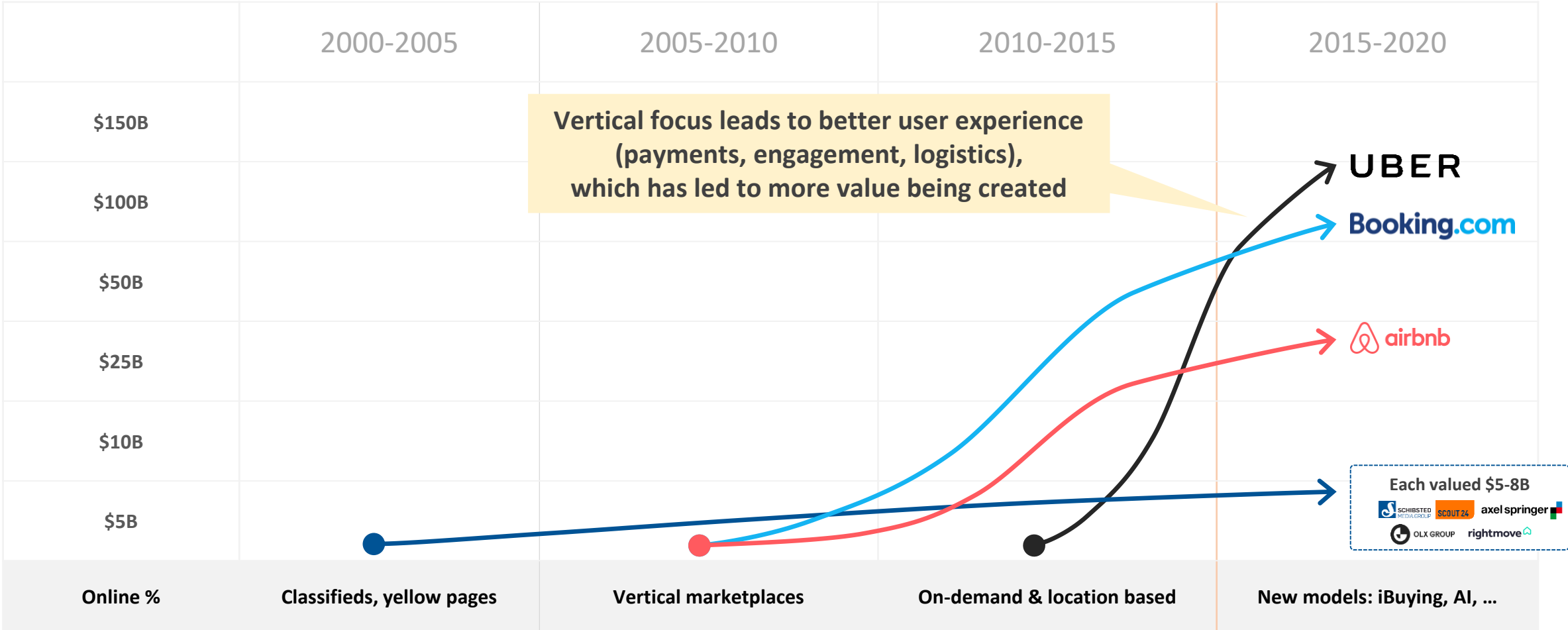
24 Aug 2018

Schibsted announced an investment in real estate startup Kodit.io which buys homes directly from homeowners before reselling them.

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3. Corporate strategic landscape
4. Segment deep-dives

Emergence of global marketplaces, creating more value than ever before

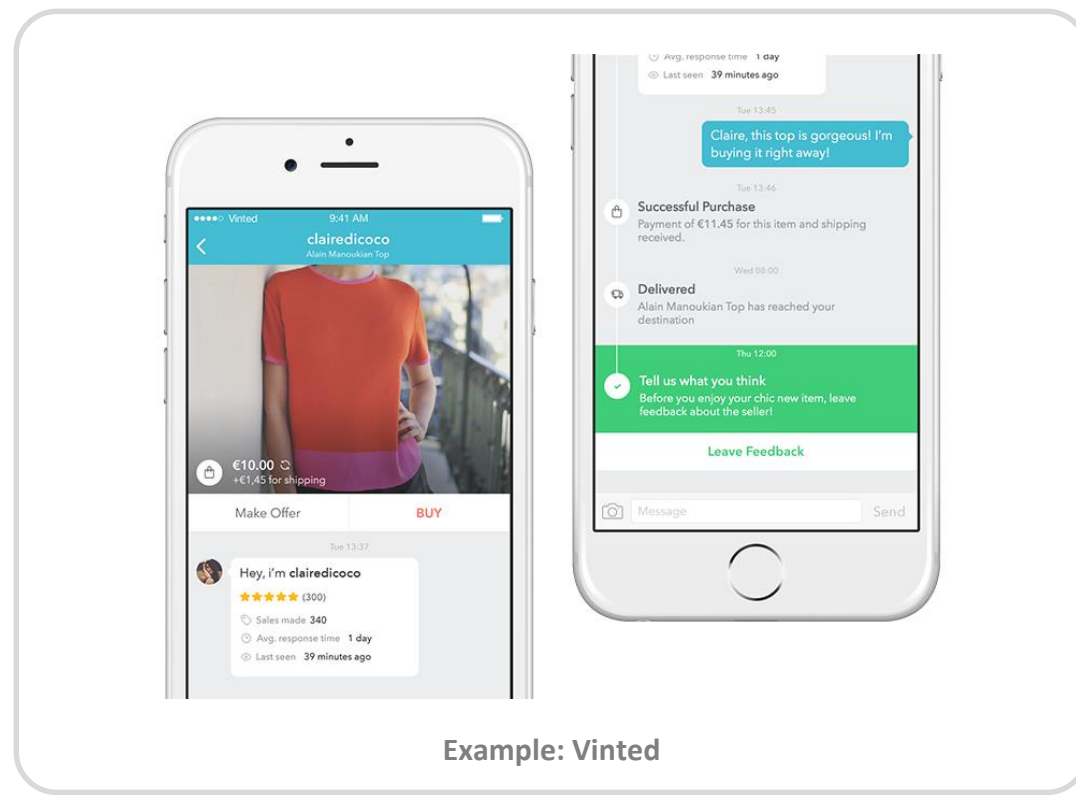


The unbundling continues: smaller markets, greater value

Unbundling of the OLD:
 Huge addressable market
 Inefficient matching
 Supply-driven











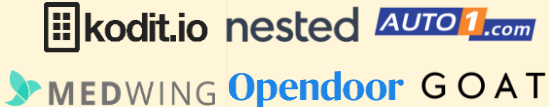


The NEW:
 Vertical focus (superior UX)
 More efficient matching
 Greater convenience (transactional)



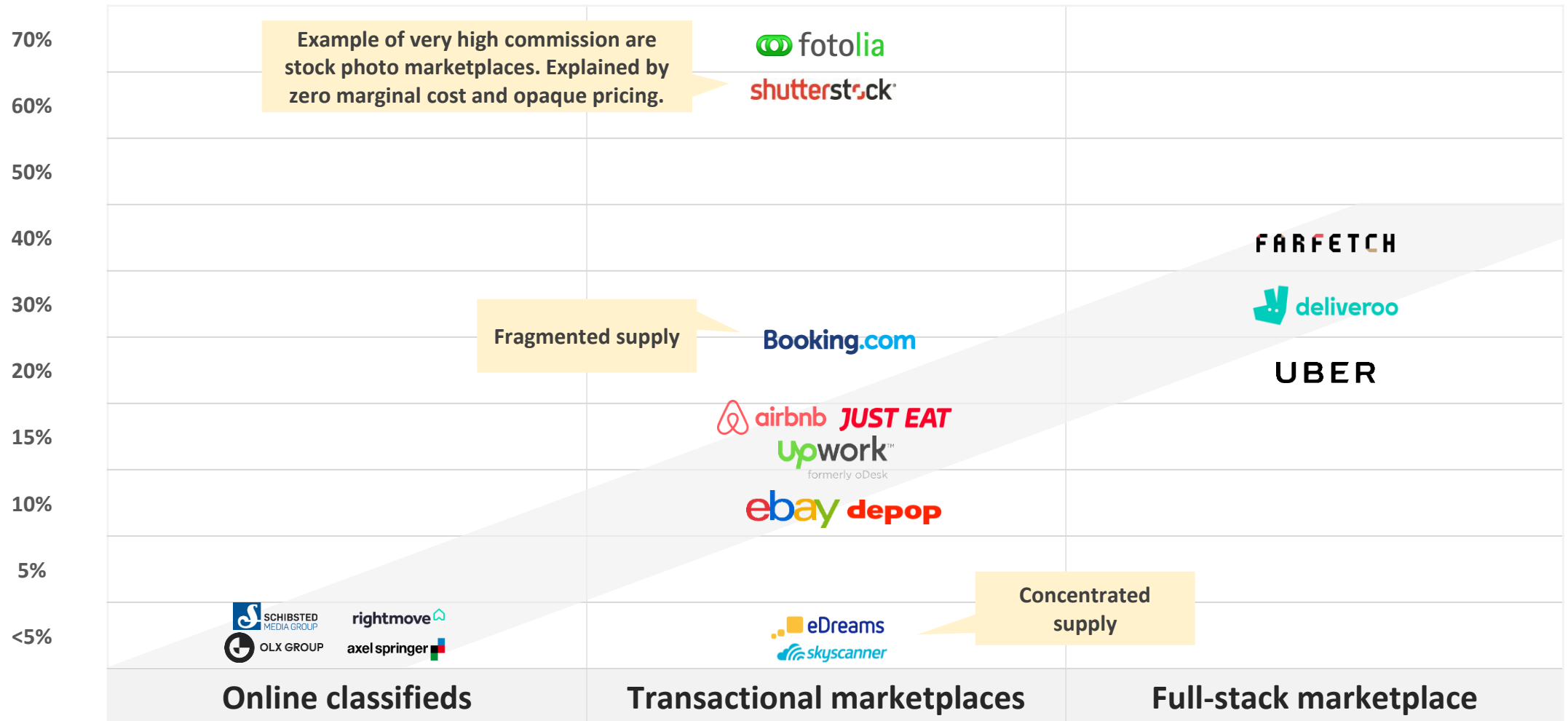
Example: Vinted

Greater transaction ownership: reduced friction, greater convenience but also greater operational complexity

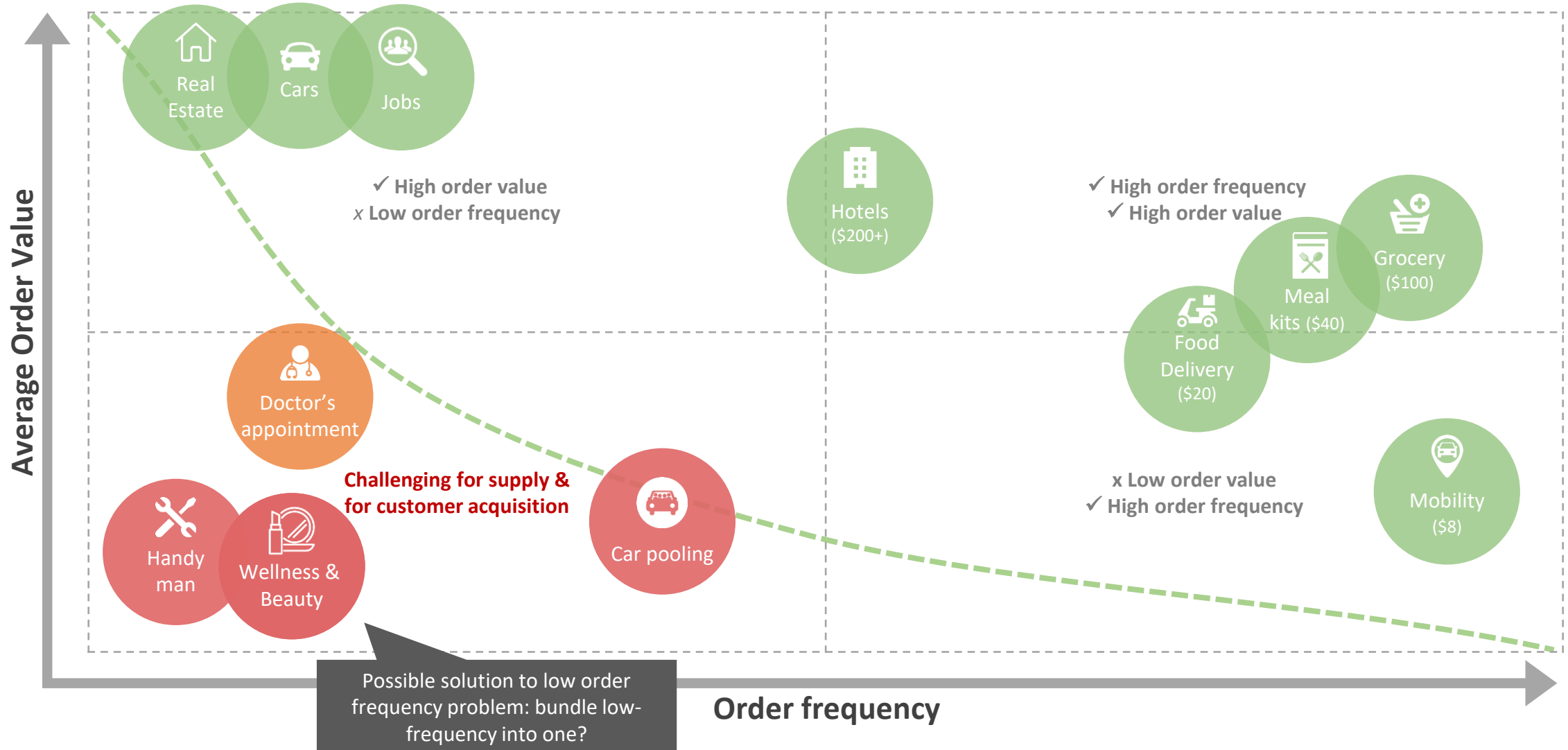
Demand 	Customer acquisition 	Listing 	Transaction incl. payment 	Logistics & admin tools 	Inventory 	Supply 	
Classifieds	<ul style="list-style-type: none"> ✓ Asset light, profitable ✗ Low revenue per user 						Homes, cars, jobs, products
Transactional marketplaces	<ul style="list-style-type: none"> ✓ Still asset light, higher take-rate ✗ Possible long-term strategic disadvantage 						Travel, delivery, gigs
"Full-stack"	<ul style="list-style-type: none"> ✓ Expand in ancillary markets ✓ Economies of scale vs. merchant ✗ High operational risk, requires market density 						Food, on-demand
Inventory risk	<ul style="list-style-type: none"> ✓ Ability to control own destiny ✗ High capital intensity 						Homes, cars, jobs, products

Greater transaction ownership = higher % commission (but market power is also an important factor)

% commission



Order value x order frequency = customer life-time value: another key success factor



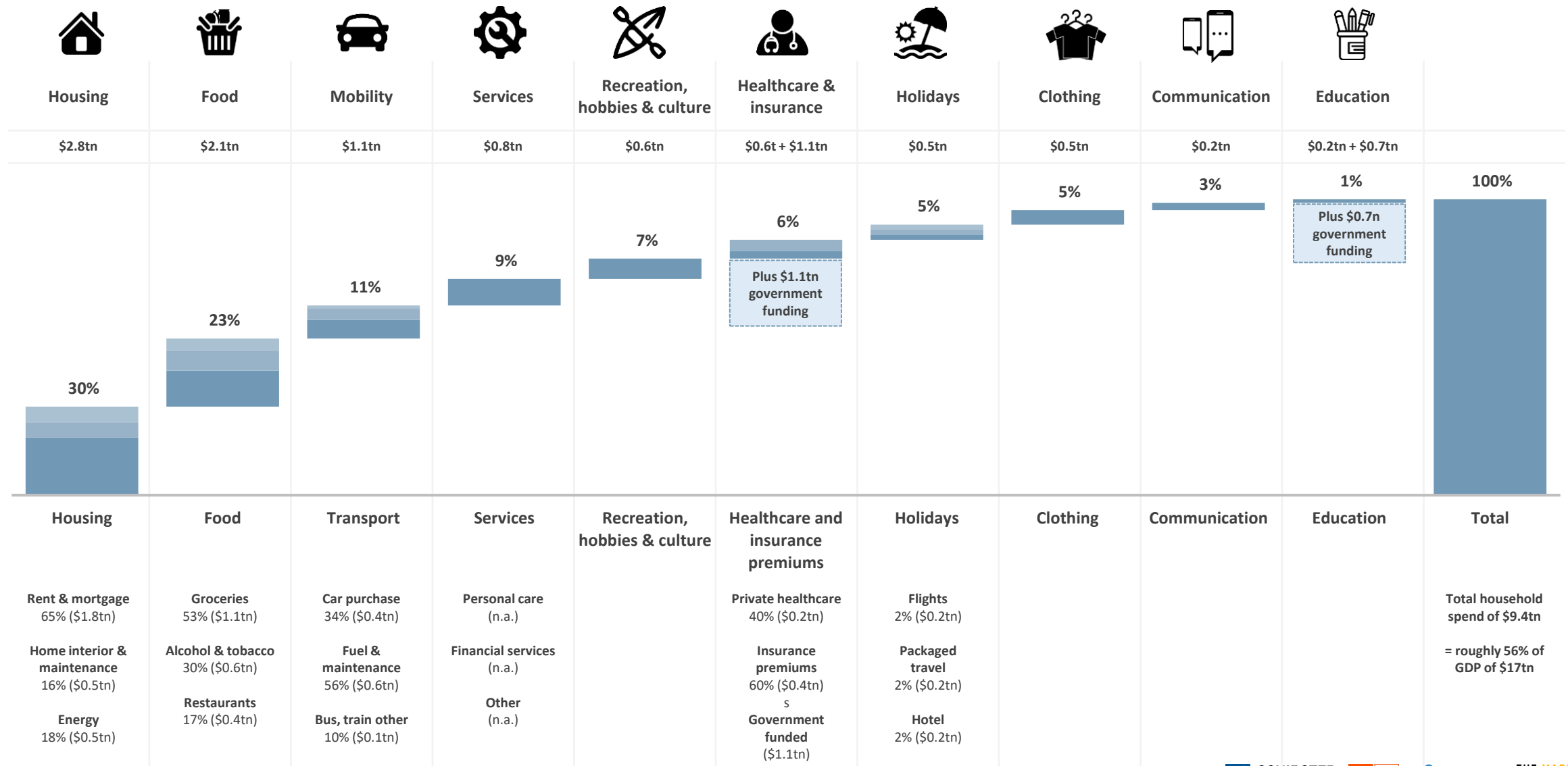
To summarise, Bill Gurley's 10 factors: a robust framework for evaluating marketplaces

	#1	#2	#3	#4	#5	#6	#7	#8	#9	
	Enhanced user experience	Economic incentive	Technology unlocking value	Fragmentation of supply	Size of market	Expand market	Order frequency	Payment flow	Network effects	
	Creating a "wow" moment with an entirely new consumer experience	Strong economic gains by joining platform	e.g. better utilization	Buyer and supplier fragmentation is a huge positive for an online marketplace	Important but can be misleading e.g. food delivery, Airbnb	Opening up previously unavailable market	High frequency is good for supplier	Being part of payment flow brings more influence in value-chain	The marketplace becomes stronger as it grows and matures	
UBER	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Booking.com	✓	✓	✓	✓	✓	✓	✓	✓	✓	← = major success factor
amazon	✓	✓	✓	✓	✓	✓	✓	✓	✓	
deliveroo	✓	✓	✓	✓	✓	✓	✓	✓	✓	← = neutral or positive
FARFETCH	✓	✓	✓	✓	✓	✓	✓	✓	✓	
airbnb	✓	✓	✓	✓	✓	✓	✓	✓	✓	
AUTO1.com	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Glovo	✓	✓	✓	✓	✓	✓	✓	✓	✓	
trivago	✓	✓	✓	✗ (booking)	✓	✓	✓	✓	✓	
letgo	✗	✓	✓	✓	✓	✓	✓	✓	✓	
BlaBlaCar	✓	✓	✓	✓	✗	✗	✓	✓	✓	
treatwell	✗	✓	✓	✓	✓	✓	✗	✓	✓	← = major hurdle to growth
Doctolib	✗	✓	✓	✗ (regulated)	✓	✓	✗	✓	✓	
BOOK A TIGER.	✗	✓	✓	✓	✓	✓	✗	✓	✓	
leboncoin	✓	✓	✓	✓	✓	✓	✓	✗ / ✓ (coming)	✓	
eDreams	✓	✓	✓	✗ (airlines)	✓	✓	✓	✓	✓	







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\$9 trillion in consumer household spending: two-thirds is spent on housing, food and transportation



Real estate is the largest consumer market, but the furthest away from being digitally unlocked

	INCUMBENTS	INNOVATORS	THEMES
 <p>\$1.8 trillion</p> <p>Rent & mortgage</p>		<p>Ownership UNMORTGAGE</p> <p>Investing and landlord goodlord</p> <p>LendingHome</p> <p>Marketplaces Opendoor nested</p> <p>PURPLE BRICKS</p>	<ul style="list-style-type: none"> ✓ Home ownership becoming financially out of reach ✓ iBuying (Opendoor) ✓ Crowd-investing
 <p>\$0.5 trillion</p> <p>Interior & maintenance</p>		<p>Interior Rakuten</p> <p>WESTWING MADE.COM</p> <p>houzz amazon</p> <p>Maintenance Helping mano mano DO</p>	<ul style="list-style-type: none"> ✓ Smart & connected home ✓ IKEA is a bit lost? Opportunity for startups
 <p>\$0.5 trillion</p> <p>Energy</p>		<p>Efficiency tado°</p> <p>greenyellow smart energy solutions</p> <p>Solutions SolarCity</p> <p>Marketplaces vandebon</p> <p>NLE</p> <p>direct energie</p>	<ul style="list-style-type: none"> ✓ Push for sustainability ✓ Sustainable energy nears economic viability

Anticipated shift from ownership to mobility-as-a-service is still in early stage: still only a fraction of consumer spending













	INCUMBENTS	INNOVATORS			THEMES
<p></p> <p>\$100 billion</p> <p>Mobility</p>		<p>Short</p> 	<p>Medium</p> 	<p>Long</p> 	<ul style="list-style-type: none"> ✓ IPOs for Uber (\$150B) and Lyft (\$15B) ✓ Uber and Lyft moving into micro-mobility & logistics ✓ Lyft and Uber launched subscription service
<p></p> <p>\$0.4 trillion</p> <p>Car purchase</p>	<p>DAIMLER</p>  <p>AutoTrader</p>	<p>Subscription</p> 	<p>Marketplaces</p> 	<p>Hardware/software</p> <p>TESLA</p>	<ul style="list-style-type: none"> ✓ iBuying (“Auto1” model) ✓ Car giants transforming into Mobility-as-a-service ✓ AI-assisted driving
<p></p> <p>\$0.6 trillion</p> <p>Fuel & maintenance</p>		<p>Fueling</p> 	<p>Maintenance</p> 	<ul style="list-style-type: none"> ✓ Electric cars gaining traction ✓ Push for cleaner cities ✓ BP investing in subscription model 	

Consumers want more options; meanwhile cities are looking to reduce congestion and create cleaner cities

	SHORT (0-5km)	MEDIUM (5-20km)	LONG (20km+)
Trains, busses & shuttle busses			
Subscription			
Scooters & eBikes			
Hailing			
Renting & sharing			
Pooling			

AI-assisted driving:

Food delivery, groceries and dining are converging, driven by innovators setting new consumer expectations

	INCUMBENTS	INNOVATORS	THEMES
 <p>\$1.1 trillion</p> <p>Groceries</p>			<ul style="list-style-type: none"> ✓ Big brands are doing direct-to-consumer via delivery platforms (Ben & Jerry's) ✓ Online penetration is around 6% (10%+ in London, Beijing, Shanghai) ⁽¹⁾ ✓ Services like Amazon Prime and Glovo are re-setting consumer expectations
 <p>\$50 billion</p> <p>Delivery</p>			<ul style="list-style-type: none"> ✓ Delivery is still just a fraction of total market ✓ More and more restaurants accept online orders ✓ Groceries are another huge market for delivery
 <p>\$0.6 trillion</p> <p>Restaurants</p>			<ul style="list-style-type: none"> ✓ Dark kitchens may redefine restaurant industry ✓ Point-of-sale software and booking apps
 <p>\$0.4 trillion</p> <p>Alcohol & Tobacco</p>			<ul style="list-style-type: none"> ✓ Still a huge market, as evidenced by Juul (\$16B!) ✓ Brewdog: innovated mass-market brand building ✓ Consumer focusing on health ✓ \$0.4tn still does not include cannabis!

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Leading investment themes by investor type: corporates and venture capital firms are both betting on fundamental shifts

Venture capital



Corporate



Private equity



Investment focus:

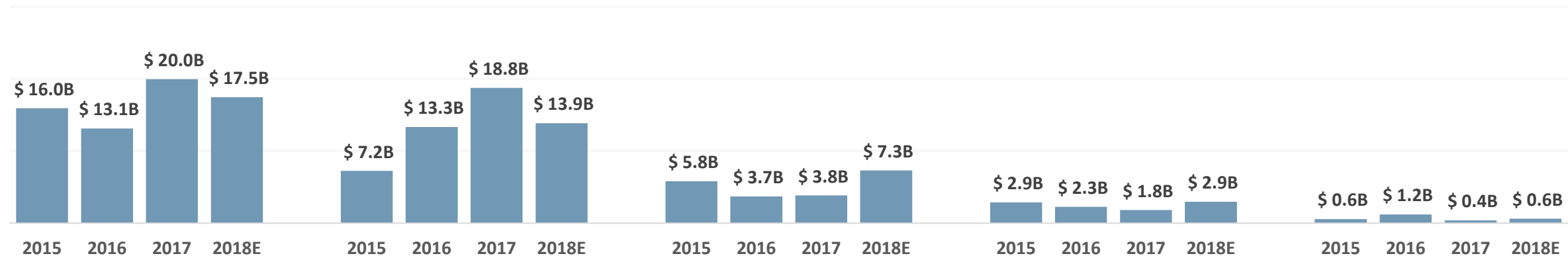
frictionless marketplaces, unbundling, full-stack, fundamental changes in consumer behavior (mobility, food)

Investment focus:

second-hand goods, real estate, cars (less in jobs)

Venture capital investment in marketplaces has been focused on mobility and food

Global venture capital investment (\$B)



Mobility



Food



Fintech


































Real estate

















Jobs















Corporates are making big strategic bets in fintech, cars & mobility, food, and jobs & recruitment

	 Mobility	 Food	 Jobs & Education	 Homes
Transaction value ('16-'18E)	\$ 27B	\$ 30B	\$ 5B	\$ 2B
Notable corporate deals in recent years (2016-2018E)	DAIMLER → €70M → 	Nestlé → £175M → 	RECRUIT → \$1.2B → 	axel springer → £125M → 
	Uber → \$335M → 	Rakuten → €115M → 	axel springer → \$18.5M → 	SoftBank → \$400M → 
	Lyft → \$250M → 	Unilever → \$10M → 	randstad → \$429M → 	DMGT → £20M → 
	Alibaba.com → \$866M → 	Alibaba.com → \$200M → 	Adecco → €335M → 	
	BMW → \$159M → 	NASPERS → €1.0B → 	Microsoft → \$26B → 	
	VW → \$300M → 	amazon → \$14B → 	NASPERS → \$60M → 	
	Booking.com → \$200M → 			
	bp → £ 5.5M → 			
	TOYOTA → \$300M → 			
	Tencent 腾讯 → \$1.1B → 			
	intel → \$15.3B → 			
	DMGT → £30M → 			

The smart money: selected top-tier Venture Capital firms

	 Cars & Mobility	 Homes	 Jobs & Reschooling	 Fintech	 Health	 Food
	Movinga (moving booking) CarSpring (iBuying) Happycar (search & book rentals)	Evtiko (online agent) Proprioo (online agent) Lamudi (online aggregator)	Iziwork (aggregator) Koru Kids (nanny hiring) Helping (on-demand hire)	theGuarantors Spotcap	Humanoo (wellness tracking) Vaniday (wellness booking)	Lemoncat (catering marketplace) Petsdeli (pet food market) EatFirst (delivery)
	Cowboy (e-bike) Bird (scooter) JustPark Movinga (moving booking) BlaBlaCar (ridesharing) Drivy (p2p rental)	Property Partner (investing)	Culture Amp (HR software) Beamery (HR software) Adzuna (search) Justworks (HR software) Wayup (part-time hire) Qapa (on-demand hire)	CoverWallet (Insurance) Revolut (banking) Alan (Insurance) Robinhood (Stock marketplace) Wealthfront Raisin (savings marketplace)	KRY (video consultations)	Petsdeli (pet food market) Good Eggs
	Bird Cogoport (freight search) Carwow (car Search) BlaBlaCar (ridesharing)		Job Today Checkr (HR software) Grovo (online learning) Knewton (online learning)	Deserve (banking) Wonga (online lending) CoverFox (online insurance) Power2SME (online lending) The Zebra (Insurance comparison)	KRY (video consultations) Doctolib (doctor booking)	
	MeinAuto.de (iBuying) Carmudi (iBuying) Wind Mobility (e-scooter)	Exporo (crowdfunding) Lamudi (online aggregator)	STUDITEMPS (temporary hiring) Lecturio (teaching platform)	Wonga (online lending) Lendico (p2p loan) BUX (trading) Spotcap (online lending)	Ottonova (insurance) Care.com (care services) Moodpath	EatFirst (delivery)
	Wunder (ride sharing) Caroobi (maintenance) Drover (car rental) Auto1 Group FreightHub (logistics marketplace)	Homelike (iBuying)	Medwing (on-demand hire) Joblift (aggregator)	Enmacc (trading)		
	Tier Mobility (e-scooter) Cargo One (freight search and booking) OnTruck (trucking)		Preply (teaching platform) Helping (on-demand hire) Brainly.com (teaching platform)	Revolut (banking) Finiata (online lending)	docplanner (doctor booking) Zentist (insurance)	Lemoncat (catering marketplace) Green Blender
	Tier Mobility (e-scooter)	Kodit	Sunlight (online learning)	Wefox (insurance comparison) wikifolio		
	ParkJockey Grab (ride sharing) Ola (ride sharing) Auto1 Group GetAround (ride sharing)	Opendoor Compass		Solaris Bank PolicyBazaar (insurance comparison) Kabbage (online lending)	TalkSpace (online therapy)	DoorDash (delivery) Ele.me (delivery)

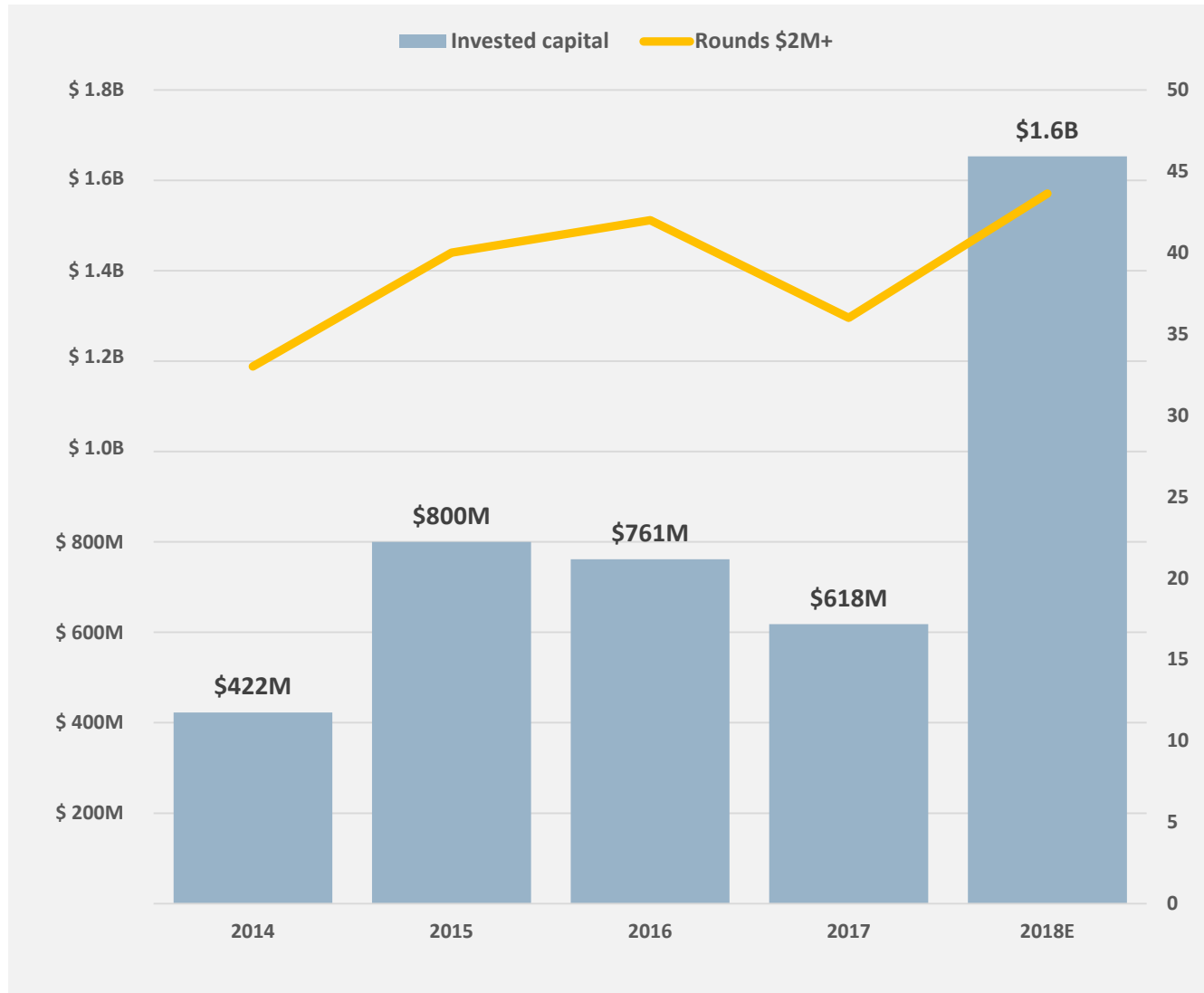
The smart money: selected top-tier Venture Capital firms (2)

	 Cars & Mobility	 Homes	 Jobs & Reschooling	 Fintech	 Health	 Food
	Lime (escooter) OnTruck (trucking) Ofo (bike sharing) GoEuro (bus booking)	LendInvest Habito (mortgage broker) Uniplaces (search)	Jobandtalent (on-demand hiring) MasterClass (online learning) Knewton (online learning) Quipper (online learning)		ZocDoc (doctor booking)	FarmDrop (online marketplace) Wolt (delivery)
	OnTruck (trucking) JustPark (parking booking) Citymapper Motorway.co.uk (iBuying) Drivy (p2p car rental)	Adzuna (search) Trussle (mortgages) Bricklane (investing)	Beamery (HR software) Jobbatical (on-demand hire)	Robinhood (trading)	Verify (on demand insurance) Beautystack (wellness booking) Zego.com (on demand insurance)	Taster (delivery)
Northzone	Tier Mobility (escooters) FreightHub (logistics marketplace)		StepStone (search) Aevy (job search) Personio (HR software)	Crosslend (investing) Zopa (p2p loan)		Matsmart (delivery) Lemoncat (catering marketplace)
	SpotHero (parking booking) BlaBlaCar (ridesharing)		Udemy (online Learning) SmartRecruiters (HR software) Harver (HR software)			Ritual.co Freshly (delivery)
	GoEuro (bus booking) Auto1 Group	McMakler (online agent)	HeavenHR (HR software)	Wefox (insurance comparison) Clark (insurance) Prosper (p2p loan)	Missbeez (on-demand wellness) docplanner (doctor booking) MediQuo (online help)	Lemoncat (catering marketplace)
	Caroobi (maintenance) Auto1 Group	PurpleBricks (online broker) McMakler (online agent)	Joblift (aggregator) HeavenHR (HR software)	Finiata (online lending) VouchedFor (comparison) Raisin (savings marketplace)	Vint (gym instructors marketplace)	
	Voi Technology (escooter) Frontier Car Group Carwow Cars45 Virtuo	Nested	Peakon (HR software) Jobbio (job search) Workable (HR software)	Zopa (p2p loan) Wonga (online lending) Revolut (banking) Prodigy Finance	Zego.com (on demand insurance)	Simple Feast (meal kit delivery) Vivino (online wine marketplace)

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Cars and mobility marketplaces – Investment in Europe



















SELECTED COMPANIES	2018	ROUND
Auto1 Group Provides consumers with access to thousands of used and new cars	Jan	€ 460M GROWTH EQUITY
Taxify Leading ride-hailing app in Europe and Africa	May	\$ 175M LATE VC
Cabify Car booking web and mobile app	Jan	\$ 160M SERIES E
BlaBlaCar Connecting drivers with empty seats to people looking for a ride	Nov	€ 101M GROWTH EQUITY
Frontier Car Group Builds and runs marketplaces focused on emerging markets	May	\$ 89.0M SERIES C
Voi Technology Sharing service for electric vehicles	Nov	\$ 50.0M SERIES A
Cityscoot Electric scooters rental	Feb	€ 40.0M EARLY VC
Blacklane Driver booking platform	Jan	\$ 40.0M SERIES D
OnTruck Connects businesses with freight carriers	May	€ 25.0M SERIES B
Tier Mobility Electric scooters that can be rented on demand	Oct	€ 25.0M SERIES A

Click [here](#) to explore similar funding rounds on Dealroom.co










Cars and mobility marketplaces to watch (1/2)

CATEGORY LEADERS

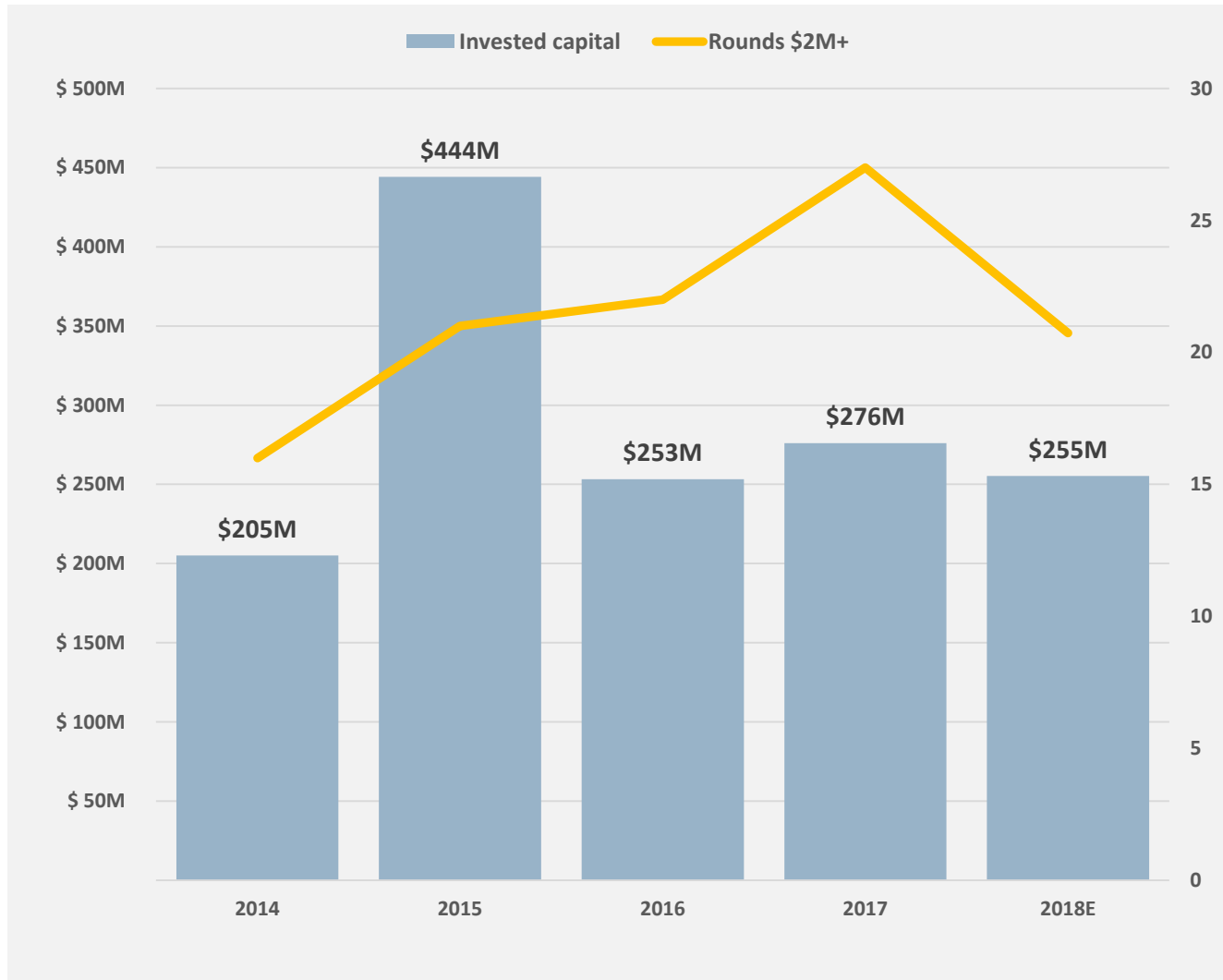
RISING STARS AND ENTRANTS











	Marketplace / Search  Autoscout24, CarGurus (US), Vroom (US)	Cazoo.co.uk, ReezoCar, CarPrice, Kyump, GoodBuyAuto, Valuecar, Autovisual, BrumBrum, GarajSepeti, Carizy, Carsnip, Carnovo, Motorway, CarSpring
	New car 	MeinAuto.de, Autospot, Valuecar
	Auto1 Model 	Frontier Car Group, Tootle, Etachki Fallen angel: Dealer Direct
	Car subscription  Tusker	Drover, Bipi, Cluno, Amber
	Car sharing 	Wunder, SnappCar, TravelCar, Koolicar, Drivy, Nabobil, SocialCar, Green Wheels, ecov, Share your Bicar, Carlili, BelkaCar, Bzst
	Ride sharing  GoMore	BeeRides, Get My Car, iGoOn, CityGo, Zify, Karos
	Parking marketplaces  Spot Hero	JustPark, Ilollo, ParkBee, Parkpnp, ParkCloud, ZenPark, ApParkingSpot, Parkimeter, Letmespace, Parclick
	Fuel / maintenance 	Zebra Fuel, EO Charging, Caroobi, Fixico, Who Can Fix My Car, ClickMechanic, TALLERATOR, Daparto, Tyres on the Drive, POMP

Cars and mobility marketplaces to watch (2/2)

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
 Short distance / Scooter / eBike	 LimeBike Your ride anytime	VanMoof, Superpedestrian, Donkey Republic, Cowboy, Swapfiets, Cityscoot, Voi Technology, unu, ElectricMolo, Silence, Etergo, Felyx, Yugo, Urbee, Sigo, Emmy, TIER Mobility, Wind Mobility, YEGO
 Medium distance	Uber Cabify, Taxify, Lyft	Blacklane, Whim (MaaS Global), Talixo, Citymobil, inDriver, Citymapper, heetch, JoinUp, voltlines, Liftago, Eurecab, Mivai, My Sam, Cab Guru
 Long / Aggregators	FLIXBUS GoEuro	Busfor, Obilet, ComparaBUS, Bookingabus.com
 Trucking	CONVOY	Everoad, InstaFreight.de, OnTruck, Quicargo, PackBud, Shipvio, Utily.fr, Truckin, Deliver.ru
 Shipping	 FREIGHTOS ShipServ	iContainers, FreightHub, Flexport, ParcelParcel.com, Zencargo, Cargo One, Chronotruck
 Last mile logistics		On the dot, Dostavista, Seven Senders, Packlink, Homerr, Eliport, Brenger, Koiki,
 Moving services		Trusk, Movinga, Furgo













Real Estate marketplaces – Investment in Europe



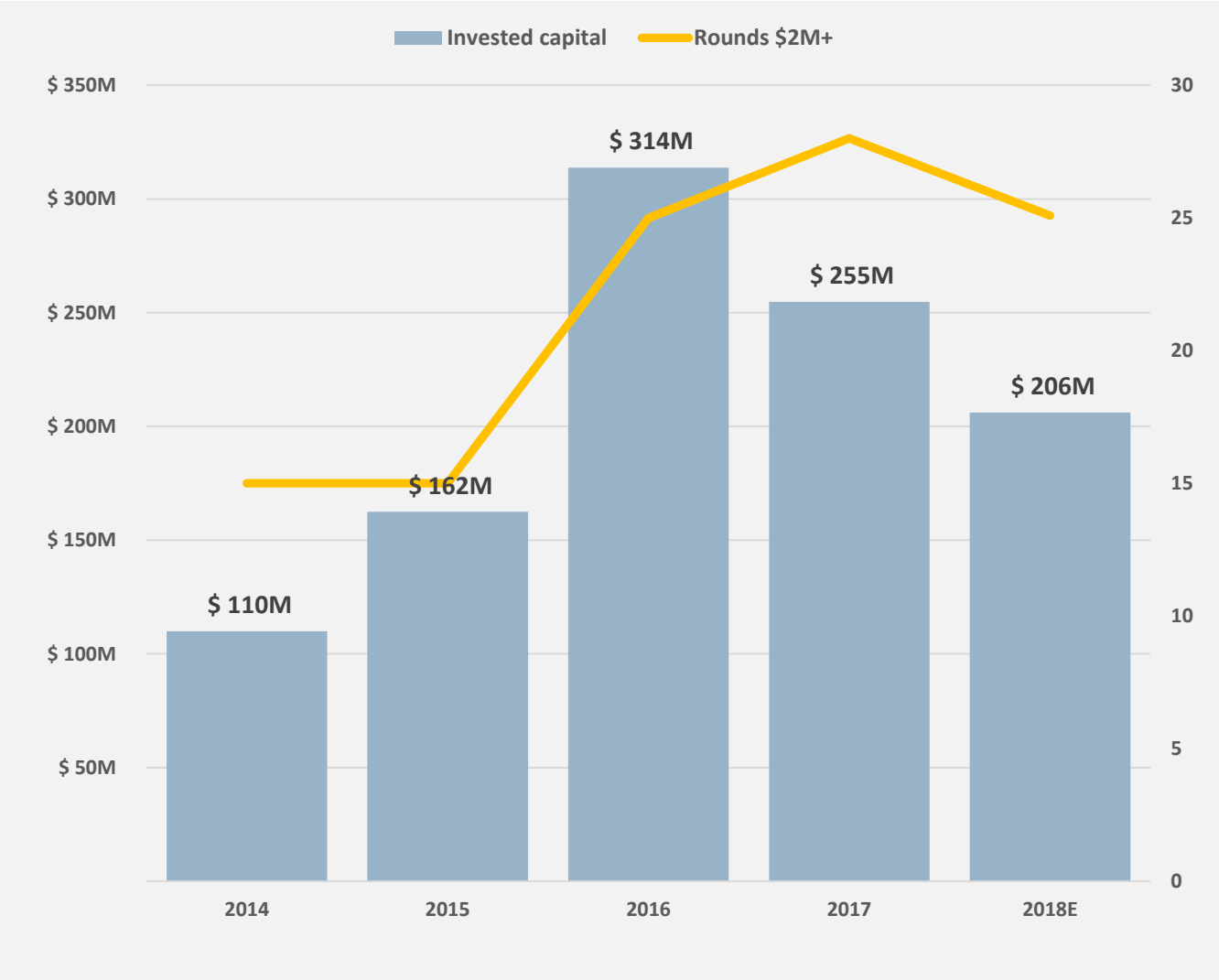
SELECTED COMPANIES	2018	ROUND
 Spotahome Medium-to-long term rentals for expats such as students and professionals	Jun	\$ 40.0M SERIES B
 Yopa The affordable, quick & simple way to sell your home	Aug	£ 20.0M SERIES D
 Nested Platform for homeowners to sell their homes within 90 days	Nov	£ 20.0M SERIES C
 Homeday Finds the best real estate agent to sell your property	Oct	€ 20.0M SERIES B
 Trussle Online mortgage broker	May	£ 13.6M SERIES B
 LendInvest Online peer-to-peer lending platform for mortgages	Jan	£ 12.5M LATE VC
 Homelike Marketplace for long-term furnished apartments	Aug	\$ 14.0M SERIES B
 Adzuna The UK's search engine for Jobs, Property & Cars	May	£ 8.0M SERIES C
 Housing Anywhere Allows students to sublet their rooms to exchange students	May	€ 6.0M SERIES B
 Homepal Helps you to find a home	Sep	€ 2.3M EARLY VC











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Real Estate marketplaces to watch

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
	iBuyers 	Nested, Homeloop, Dili, Evtiko, Kodit, ProntoPiso, We Buy Any Home
	Home search  Adzuna, Spotahome, Zoopla, Zillow	Homelike, Student.com, Uniplaces, Appear here, Sturents.com, Italianway, Flatlooker, Lyvly, Housy, Habiteo, homie.rent, Home HT, Wunderflats, Movebubble, Howsy (No Agent)
	Online brokers  Yopa	easyProperty, emoov, McMakler, Blueground, Homeday, Proprioo, Hemverket, Mon Chasseur Immo, Housfy, Hosman, Ouistock, Home Made
	Ownership 	Lamudi, Ikimo9, Homepal, Vesta Property, Unmortgage, Realbest, Blok, thirdfort, Flatfox, Green-Acres.fr
	Investing 	LendInvest, Property Partner, Housers, Atlant.io, CapitalRise, iFunded, BrickVest, Exporo, geoblink, Tessin, Brickshare, Bricklane
	Financing / Mortgages 	Trussle, Habito, MortgageGym, StoEr, Jungo







Jobs & reschooling – Investment in Europe



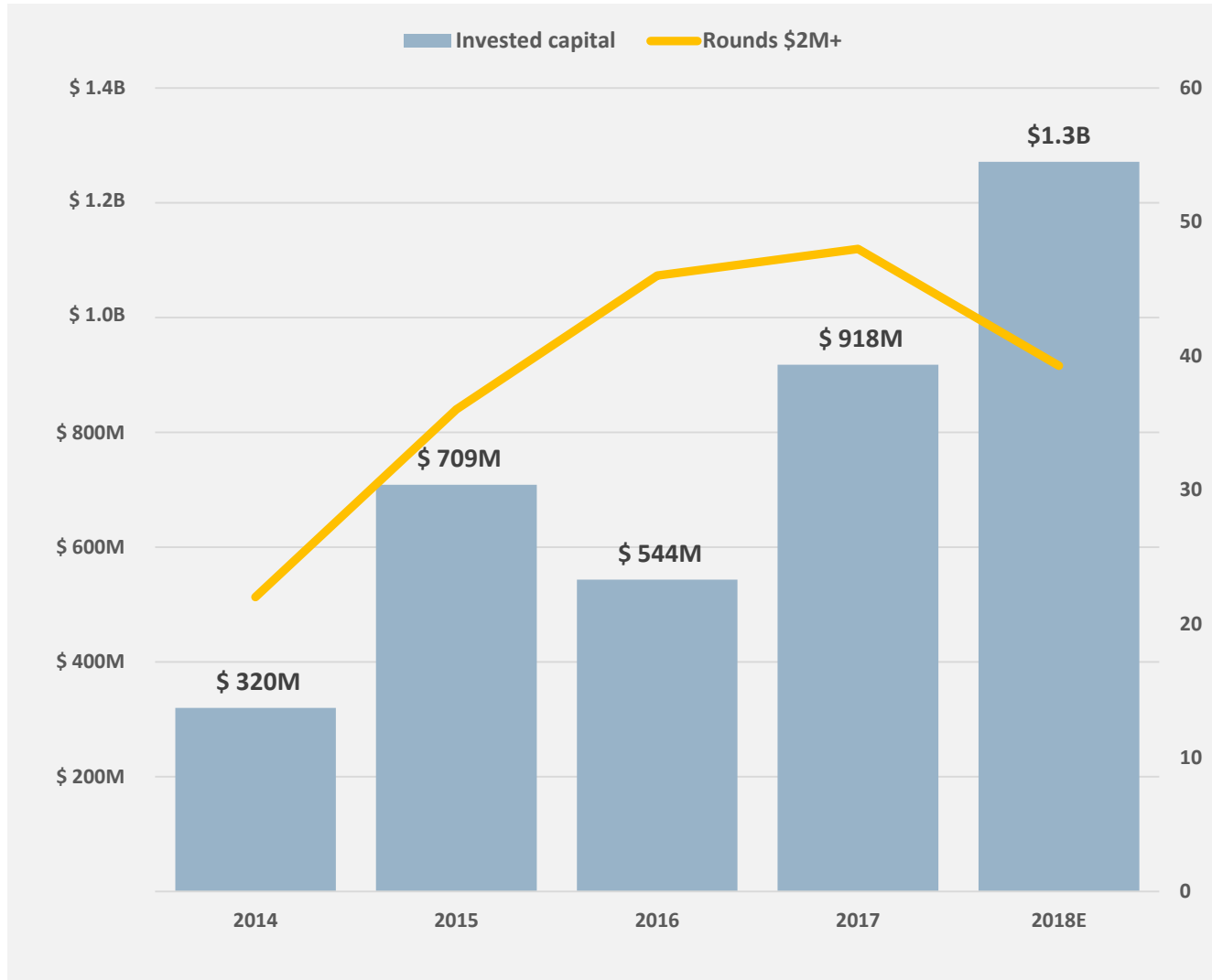
SELECTED COMPANIES	2018	ROUND
 OpenClassRooms Online education platform in Europe	May	\$ 60.0M SERIES B
 Area9 Personalized, adaptive online learning modules	Jan	\$ 30.0M LATE VC
 Unicaf Online education platform	Nov	\$ 28.0M SERIES B
 Coople On-demand marketplace for temporary staffing	Oct	\$ 21.0M LATE VC
 Gojob Digital temporary work operations in Europe	Jan	€ 17.0M EARLY VC
 ZenJob Automated, data-driven, full-service staffing platform	Nov	€ 15.0M SERIES B
 Job Today Online mobile centric recruitment marketplace	Sep	\$ 16.0M SERIES B
 comet Marketplace for freelancer	May	€ 11.0M SERIES A
 Goodwall Professional social network for students and graduates	Jul	\$ 10.8M SERIES A
 Comatch Matching companies looking for consultants with freelancers	Apr	€ 8.0M SERIES B











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Jobs & reschooling companies to watch

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
 <p>Job search</p>	 <p>Monster, PeoplePerHour, StepStone, Jobandtalent</p>	<p>Hosco, Adzuna, Graduateland, Joblift, Welcome to jungle, job.com, Debut, Techloop, Isivi, Truffls, BeWanted</p>
 <p>Reschooling</p>	 <p>PLURALSIGHT</p> <p>Udacity, OpenClassRooms, Coursera, Udemy</p>	<p>Ornikar, SpeachMe, A Cloud Guru, InvivoX, Imusic School, Nimbles, Obby, Area9, Lambda School</p>
 <p>Gig-Economy</p>	 <p>Fiverr, Shiftgig</p>	<p>ZenJob, Brigad, Job Today, StaffMe, Side, Hopwork, Comatch, Gojob, Comet, Syft App, Helping, YouDo, Coople, The Dots, Jobbatical, Medwing, Travauxlib</p>












Finance marketplaces and platforms investment in Europe



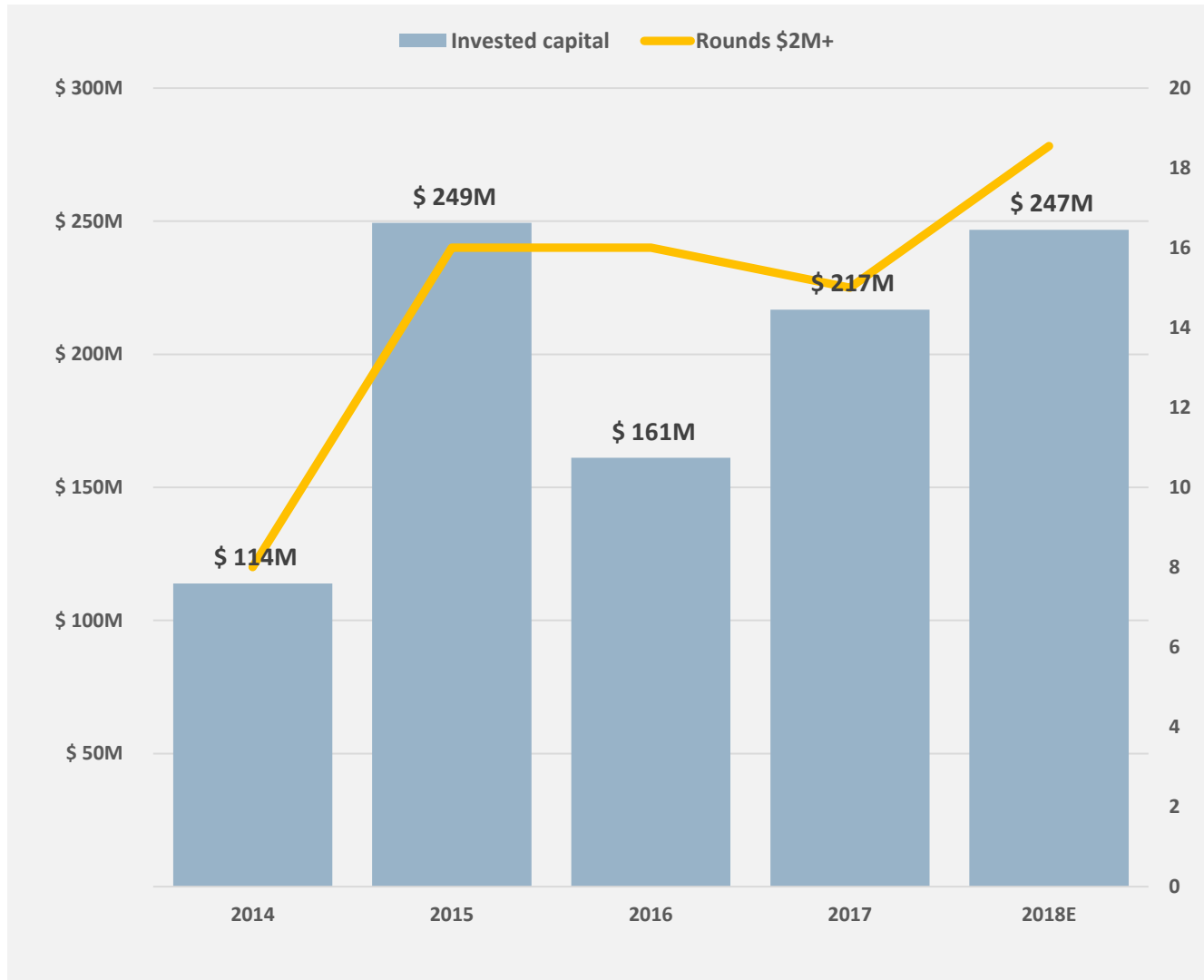
SELECTED COMPANIES	2018	ROUND
 Revolut Platform to use and manage money around the world	Apr	\$ 250M SERIES C
 Number26 Bank account that can be managed entirely from a smartphone	Mar	\$ 160M SERIES C
 Monzo London-based digital-only bank platform	Oct	£ 85.0M SERIES E
 Prima.it An insurance intermediary selling car insurance online	Oct	€ 100M GROWTH EQUITY
 Starling Bank Mobile-app based bank	May	£ 80.0M EARLY VC
 eToro Trading network with easy access to the currency, commodity, and equity markets	Mar	\$ 100M SERIES E
 Smava Germany's largest online credit market	Jan	\$ 65.0M LATE VC
 October (Lendix) P2P lending platform for SMEs	Jun	€ 32.0M SERIES C
 Coya Simple, transparent, and personalized insurance cover	Jun	\$ 30.0M SERIES A
 Clark Insurance robo-advisor	Apr	\$ 29.0M SERIES B











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Finance marketplaces and platforms to watch

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
 Challenger banks	 Monzo, N26, Atom, Starling Bank	Solaris Bank, Monese, Tandem, Qonto, Meniga, bunq, goHenry, Fiinu, Shine, Margo Bank
 Lending	 OakNorth	Hypoteket, Spotcap, Future Finance, SalaryFinance, Bynk, Aprila Bank, WeShareBonds
 Insurance	 OSCAR	Alan, Coya, Clark, Hellas Direct, Prima.it, Ottonova, Simple.fr, Honcho, Wrisk, Simplis, Cuvva, Zego
 Product comparison	 融360 RONG360.COM smava	Lendo, Moneyexpert, TotallyMoney, Bankimia, Wefox, Funding Options, Topcompare.be, Fincompare, Samlino, Finanzchef24, Helpmycash, BNEXT
 Trading	 robinhood eToro, DEGIRO	BUX, Bitstamp (acquired), Coinify, Raisin, Coinfloor, Pelican Trading, Lykke
 Peer-to-peer	 Funding Circle Zopa	October (Lendix), Lendinvest, CurrencyFair, Lendico (acquired), Auxmoney, RateSetter, Lendify, Bondora, LendingCrowd, Savelend, Lending Works














Healthcare marketplaces – Investment in Europe











SELECTED COMPANIES	2018	ROUND
 Kry Connecting patients with doctors for video consultations	Jun	\$ 66.0M SERIES B
 Min Doktor Make appointments and consult with doctors online	Sep	€ 33.5M GROWTH EQUITY
 Cera Care Professional home care for elderly people	May	\$ 17.0M SERIES A
 Doktor.se Digital healthcare	May	\$ 14.7M EARLY VC
 Care Sourcer Platform that connects those seeking care with those providing it	Jul	£ 8.5M SERIES A
 Doc Plus On-demand doctor services	Aug	\$ 9.0M SERIES B
 Doctena Medical booking platform for doctors	Sep	€ 8.0M EARLY VC
 TeleClinic Digital health advice for individuals and employees	Nov	€ 7.0M SERIES A
 Careship Platform to find caregivers for seniors	Apr	€ 6.0M SERIES B
 Qured A doctor or physio to your door in under two hours	Aug	£ 750K SEED

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Healthcare marketplaces to watch

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
	Doctors appointments  Practo	Doc Plus, Doctolib, docplanner, Top Doctors, Doctena, Doktor.se, FINDoC, Qunomedical, Now Healthcare Group, Doctoranytime, Doctify, Dottori
	AI help 	Your.MD, Ada Health, Boost Thyroid, Emteq
	Online help  Ping An Good Doctor	Kry, PushDoctor, Min Doktor, BlueCall, Telemedi.co, MedicSpot, Competencer, Doctoconsult, Veyo Care, VideoDoc, MediQuo, Moodpath, Selfapy
	Care services  CareSource	Careship, Medigo, Cera Care, Noon Care, Qured, Pflege.de, Care Sourcer, Holm, SuperCarers
	Online pharmacy  Jianke, NetMeds, Pharmacy2U (Chemist Direct)	Echo, Farmaconfianza, Pharmasimple
	Wellness booking 	Vaniday , Booksy, Blow, Planity, Ruuby, Beautystack, Vint, Urban Massage
	Sports	Entrenarme, Eversports, Urban Sports Club, Gymlib, Fitnessant, PayasUgym, Fitprime

Other consumer marketplaces to watch

	CATEGORY LEADERS	RISING STARS AND ENTRANTS
 <p>Horizontal & collectibles</p>	 Jumia Market, ShopClues, 1stdibs, Catawiki	Sellpy, Trouva, LoveCrafts, Barnebys, Fyndiq, Used By, Gebraucht.de, Yroo
 <p>Fashion</p>	 Zappos, Poshmark	GOAT, Videdressing, Watchmaster, Lesara, 21 Buttons, Lyst, Chronext, United Wardrobe, KupiVIP, SecretSales, Vestiaire Collective, Vinted, Depop, Swap.com, Sallery, Atterley, Lidyana.com, Rebelle, Seezona, The Next Closet, Zadaa, Thrift+, Armadio Verde, Miller & Marc, Otrium, Findur, Trendday, StyleLounge, Gardrops
 <p>Furniture</p>	 Home24, made.com	Home24, made.com, Swoon Editions, Selency, Beleco, Deesup, Hallfy, Auctionet.com
 <p>Pets</p>	 Barkbox	ePetworld, Barkibu, Tailwise, Mascoteros, PetMe, HouseMyDog, Snau, Dogley

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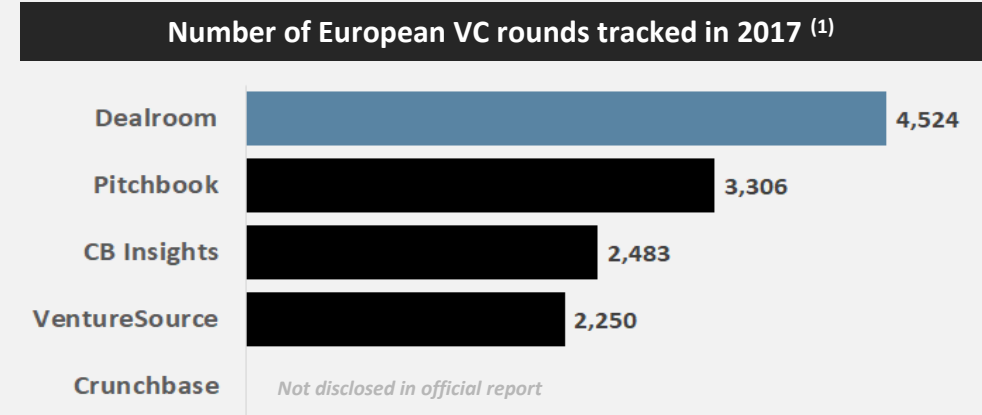
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