

Building Gumtree's supply-side intelligence engine

Who's winning stock, where sellers go, and how
Gumtree performs — across verticals

DOGS CASE STUDY INCLUDED (ILLUSTRATIVE)

Continuous market visibility



Share

Know your % of market

Sellers

Track who lists where

Trends

Price, freshness, compliance

Questions answered — every month

Where is stock going?

Track volume by platform over time

What's our market share?

Gumtree's % of total supply

Who are the power sellers?

High-volume sellers & their platforms

Are we fresher than competitors?

Listing age comparison

What's pricing doing?

Monitor trends by category

Is a drop market-wide?

Separate market vs execution

From pipelines to decisions



Vertical dashboards

Live market share, pricing, inventory



Weekly tracking

Automated competitive reports



Anomaly alerts

Competitor behaviour changes



Competitor benchmark

Feature & policy comparison



Executive summary

Monthly strategic brief



Deep dives

Ad-hoc analysis on demand

CASE STUDY

Illustrative example: UK dogs market

What the engine output looks like when it's live

94% of all dogs sold in the UK are listed on an online marketplace



10 MARKETPLACES ANALYSED

Pets4Homes

FreeAds

Gumtree

Preloved

Puppies.co.uk

Kennel Club

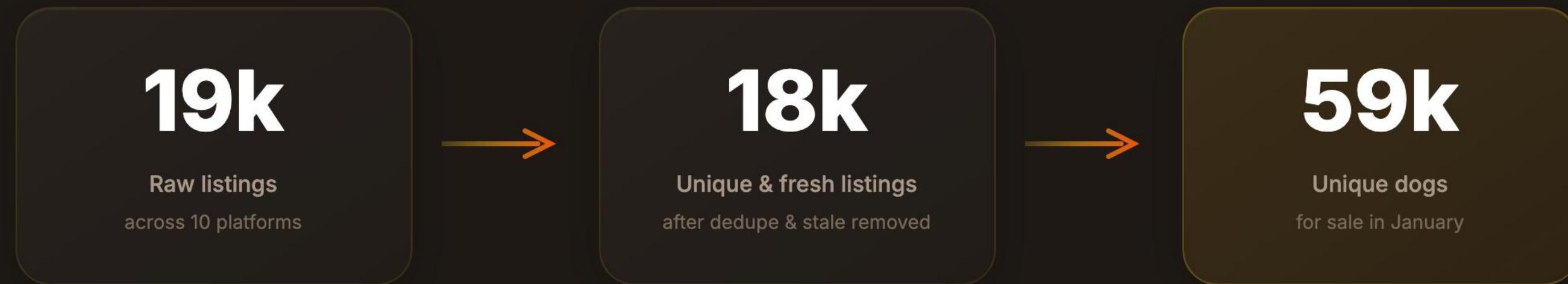
Petify

ForeverPuppy

Champdogs

Gundogs Direct

After deduplication and freshness checks, **18k listings** translate to **59k dogs**



-368 Duplicates removed

Within-platform
Cross-platform

-65
-303

-569 Stale removed

Listings older than 6 months removed as likely sold or inactive.

×3.23 Dogs per listing

Most ads are litter listings with multiple puppies available, not single dogs.

Specialist pet sites list **litters**, not individual dogs

| PLATFORM | RAW LISTINGS | RAW DOGS | DOGS/LISTING |
|----------------|---------------|---------------|--------------|
| Pets4Homes | 7,617 | 31,312 | 4.1 |
| FreeAds | 6,551 | 14,258 | 2.2 |
| Gumtree | 1,758 | 4,450 | 2.5 |
| Preloved | 654 | 893 | 1.4 |
| ForeverPuppy | 630 | 2,529 | 4.0 |
| Petify | 603 | 3,315 | 5.5 |
| Puppies.co.uk | 575 | 1,750 | 3.0 |
| Kennel Club | 411 | 2,453 | 6.0 |
| Gundogs Direct | 356 | 378 | 1.1 |
| Champdogs | 162 | 972 | 6.0 |
| Total | 19,317 | 62,310 | 3.2 |

50%

Pets4Homes share

Of all dogs listed
across 10 platforms

4.1

Pet specialists avg
Litter-based listings
(P4H, KC, Petify...)

2.4

Classifieds avg
Individual dogs
(FreeAds, Gumtree...)

94% of sellers have just one listing — private sellers dominate

SUMMARY

| | |
|-------------------------|---------------|
| Total unique sellers | 17,603 |
| With 1 listing only | 94% |
| With 2 listings | 5% |
| With 3 or more listings | 1% |

SELLER DISTRIBUTION BY PLATFORM

| PLATFORM | SELLERS | % 1 LISTING | TOP SELLER |
|---------------|--------------|-------------|------------|
| Pets4Homes | 7,186 | 95% | 8 |
| FreeAds | 5,763 | 93% | 9 |
| Gumtree | 1,657 | 94% | 3 |
| ForeverPuppy | 586 | 94% | 3 |
| Puppies.co.uk | 562 | 98% | 2 |

TOP 10 SELLERS

| # | SELLER | LIST | PLATFORM |
|-----------|--------------------------------|-----------|----------|
| 1 | Pawprints2freedom | 81 | Preloved |
| 2 | Lurcher Link Rescue | 11 | Preloved |
| 3 | justdogz | 9 | FreeAds |
| 4 | The Canine Club | 8 | P4H |
| 5 | Ritchie | 8 | P4H |
| 6 | Wiggle Waggle | 7 | P4H |
| 7 | marta.sobkowiak9911 | 7 | FreeAds |
| 8 | Since J | 7 | Petify |
| 9 | 5 Star Licensed Breeder | 6 | P4H |
| 10 | Since J | 6 | Petify |

■ Rescue ■ Breeder

42% of high-volume sellers are on FreeAds with no license tracking

UK BREEDING LICENSE REQUIREMENT

| | |
|-----------|--|
| 3+ | Litters per year Requires a local authority breeding license under the Animal Welfare Regulations 2018 |
|-----------|--|

TOP BREEDERS

| SELLER | # | PLATFORM | LICENSE |
|---------------------|---|----------|---------|
| justdogz | 9 | FreeAds | — |
| The Canine Club | 8 | P4H | ✓ |
| Ritchie | 8 | P4H | ✓ |
| Wiggle Waggle | 7 | P4H | ✓ |
| marta.sobkowiak9911 | 7 | FreeAds | — |

LICENSE TRACKING (3+ LISTINGS)

| PLATFORM | SELLERS | TRACKING | DISPLAY % |
|------------|---------|----------|-----------|
| FreeAds | 74 | None | 0% |
| Pets4Homes | 54 | Yes | 81% |
| Preloved | 8 | None | 0% |

HOW PLATFORMS MANAGE REGULATION

Gumtree
2-litter limit with verification. Sellers listing a 3rd dog must provide license proof. Vetting for licensed breeders & rescues.

FreeAds
No license verification or seller limits. High-volume sellers operate freely with no accountability.

63% of Gumtree listings are under 7 days old — freshest by far

MEDIAN LISTING AGE BY PLATFORM



■ Fresh (<14d) ■ Good (14-30d) ■ Moderate (30-60d) ■ Stale (>60d)

AGE DISTRIBUTION

| Platform | <7D | 7-30D | 30-90D | >90D |
|----------------|-----|-------|--------|------|
| Gumtree | 63% | 37% | 0% | 0% |
| Pets4Homes | 15% | 45% | 38% | 2% |
| FreeAds | 27% | 20% | 39% | 7% |
| ForeverPuppy | 4% | 24% | 61% | 2% |
| Preloved | 5% | 22% | 43% | 31% |
| Puppies.co.uk | 1% | 22% | 38% | 39% |
| Gundogs Direct | 8% | 17% | 31% | 43% |
| Petify | 2% | 4% | 17% | 71% |

Petify — Unusual Pattern

71% of listings over 90 days old, yet puppies average 13 weeks. Ages may be frozen or listings refreshed with new litters.

80-100% of listings are puppies under 1 year — Preloved & Gundogs Direct skew adult

AGE DISTRIBUTION BY PLATFORM



KEY INSIGHTS

~80%

The big 3 marketplaces (P4H, Gumtree, FreeAds) are 72-86% puppies under 1 year old

100%

Kennel Club, ForeverPuppy and Champdogs are puppy-only platforms

40-62%

Preloved and Gundogs Direct skew adult — rehoming and trained working dogs

■ <8 weeks ■ 8-12 weeks ■ 3-6 months ■ 6-12 months ■ Adult (>1yr)

97-100% of under-8-week puppies on Gumtree & P4H have future ready-to-leave dates

UK LAW: 8-WEEK MINIMUM

Weeks minimum age

8 Under the Animal Welfare Regulations 2018 (Lucy's Law), puppies cannot leave their mother before 8 weeks. Early separation causes behavioural issues, anxiety, and health problems. Platforms should enforce future ready-to-leave dates for young puppies.

READY-TO-LEAVE ENFORCEMENT

| PLATFORM | <8WK | PROTECTED | % |
|------------|-------|-----------|------|
| Gumtree | 516 | Enforced | 100% |
| Pets4Homes | 2,433 | Enforced | 97% |
| FreeAds | 559 | Optional | 4% |

HOW PLATFORMS PROTECT PUPPIES

Pets4Homes & Gumtree

Mandatory ready-to-leave field. 100% of under-8-week puppies have future dates set. Buyers cannot collect early.

FreeAds Gap

559 puppies under 8 weeks — 96% have no ready date. Of those with dates, many say "Now". Field is optional with no enforcement.

French Bulldog is most popular with 3,675 dogs — Irish Wolfhound commands highest prices at £3,000

TOP 10 BREEDS BY DOGS FOR SALE

| # | BREED | DOGS | % |
|----|----------------------------|-------|------|
| 1 | French Bulldog | 3,675 | 6.5% |
| 2 | Labrador Retriever | 3,639 | 6.5% |
| 3 | Cockapoo | 3,300 | 5.9% |
| 4 | Miniature Dachshund | 3,177 | 5.6% |
| 5 | Cocker Spaniel | 3,065 | 5.4% |
| 6 | German Shepherd | 2,084 | 3.7% |
| 7 | Dachshund | 1,812 | 3.2% |
| 8 | Cane Corso | 1,601 | 2.8% |
| 9 | Staffordshire Bull Terrier | 1,429 | 2.5% |
| 10 | Chihuahua | 1,162 | 2.1% |

MOST EXPENSIVE BREEDS (AVG PRICE)

| # | BREED | DOGS | PRICE |
|----|----------------------------|------|--------|
| 1 | Irish Wolfhound | 59 | £3,000 |
| 2 | Bernedoodle | 98 | £2,500 |
| 3 | Italian Greyhound | 120 | £2,400 |
| 4 | Pekingese | 59 | £2,350 |
| 5 | Australian Labradoodle | 128 | £2,250 |
| 6 | Old English Sheepdog | 68 | £2,225 |
| 7 | Australian Shepherd | 79 | £2,125 |
| 8 | Miniature Goldendoodle | 75 | £2,050 |
| 9 | Boxer | 296 | £2,000 |
| 10 | Dachshund (Miniature Long) | 111 | £2,000 |

Wisbech emerges as a breeder hotspot — a small town ranking #8 nationwide for dogs listed

TOP 10 CITIES BY DOGS LISTED

| # | CITY | DOGS | LISTINGS |
|----|------------|------|----------|
| 1 | London | 869 | 267 |
| 2 | Doncaster | 809 | 238 |
| 3 | Manchester | 766 | 240 |
| 4 | Birmingham | 691 | 252 |
| 5 | Liverpool | 657 | 205 |
| 6 | Nottingham | 591 | 172 |
| 7 | Leeds | 566 | 259 |
| 8 | Wisbech | 562 | 150 |
| 9 | Sheffield | 447 | 145 |
| 10 | Hull | 424 | 141 |

TOP 5 REGIONS BY DOGS LISTED

| # | REGION | DOGS | LISTINGS |
|---|-----------------|-------|----------|
| 1 | West Midlands | 1,685 | 482 |
| 2 | Greater London | 1,641 | 456 |
| 3 | South Yorkshire | 1,336 | 352 |
| 4 | West Yorkshire | 1,317 | 381 |
| 5 | Kent | 1,095 | 301 |



Wisbech Breeder Hotspot

Small town (pop. 35k) with 3 of UK's top sellers

Ritchie — 11 listings, Bulldogs, P4H (licensed)

justdogz — 9 listings, Cockapoos, FreeAds

Zoe — 5 listings, Mixed, P4H (licensed)

Dogs pilot proves the model



Market sizing works

10 platforms, 19k listings, 59k dogs, 893k/year annualised



Seller behaviour visible

Multi-homing patterns, concentration, platform preferences



Compliance gaps quantified

42% of high-volume sellers on platforms with zero enforcement



Gumtree advantages surfaced

Freshest marketplace (63% <7 days), strong compliance policies

This is what every vertical can look like with the intelligence engine

One engine, multiple verticals

| METRIC | PETS | MOTORS | PROPERTY | RECOMMERCE | JOBs | SERVICES |
|-----------------------|------|--------|----------|------------|------|----------|
| Market share | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Listing freshness | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Price tracking | ✓ | ✓ | ✓ | ✓ | — | — |
| Seller behaviour | ✓ | ✓ | ✓ | ✓ | — | ✓ |
| Compliance | ✓ | ✓ | ✓ | — | — | ✓ |
| Cross-platform dedupe | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

Same pipelines, different schemas — infrastructure is vertical-agnostic

From listings to intelligence

Turning the open web into decision infrastructure

Kim Faura

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