

ONLINE RETAILING: MARKETPLACES AND PEER-TO- PEER SELLING – UK – 2026

As the market matures, differentiation through curation as well as capitalising on positive sentiment towards UK-sourced products will present key opportunities.



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Key issues covered in this report

- Sales and growth rates of online marketplaces and peer-to-peer platforms and how they compare with the wider UK online retail market.
- The impact of updated and new regulatory frameworks, including the Digital Markets Act, product safety law reform and the forthcoming abolition of the low-value import duty threshold (de minimis).
- The growing importance of sustainability and recommerce.
- The challenge from new forms of discovery that bypass traditional marketplaces in the product selection journey.
- Consumer demand for curation and edited ranges to combat decision fatigue.
- How trust and UK-based localisation have emerged as key differentiators.

Overview

Online marketplaces and peer-to-peer platforms now account for just under a third of UK online retail spending, reaching **£34.1 billion** in Gross Merchandise Value (GMV) excluding VAT for 2025. However, sector growth has slowed to 3.7% between 2024-25, lagging the wider e-commerce market and signalling the end of a period of higher growth rates. This shift reflects a sector settling into maturity, shaped by tougher regulation, new technology and shifting consumer confidence.

Stricter product safety rules and the phasing out of low-value import duty exemptions will increasingly favour domestic retailers – whom are more trusted platforms over discount-focused overseas rivals. AI is rapidly advancing personalisation, fraud detection and seller productivity, raising the stakes for seamless discovery and shopping experiences. However, as financial confidence recovers, the appeal of value-driven cross-border marketplace spending will lose some of its appeal.

The key growth opportunity is now in premium recommerce and frictionless, hyper-local second-hand shopping – contrasting with the risk of market share loss to social commerce (eg TikTok Shop) and AI-powered search if established marketplaces fail to differentiate on curation and trust.

EXECUTIVE SUMMARY

What you need to know

Growth appears to be slowing

UK marketplaces reached a GMV of **£34.1 billion in 2025**, nearly a third of all online spend. However, growth appears to be slowing, with an increase of just 3.7% in 2025. Recovering household finances and pending regulatory reforms mean higher operating costs but will likely favour domestic platforms in the years ahead.

Recommerce is now mainstream

While 60% of shoppers say buying second-hand stretches budgets, most will continue to do so after their finances recover. **Affluent households (£75K+)** are also highly active on eBay, Etsy and Vinted, signalling strong demand for upmarket, sustainable resale and a need to serve both cost- and value-driven consumers.

Rapid AI innovation

Amazon, eBay and Vinted have invested in tools to reduce friction for buyers and sellers, with retail-run marketplaces (eg Tesco, Superdrug, B&Q) leveraging loyalty, fulfilment and curation to create trust-led niches. Premium, professionalised seller experiences and recommerce are key battlegrounds for differentiation.

Outlook for online retailing: marketplaces and peer-to-peer selling

Now (2026)

Marketplace growth will slow as improving finances reduce the appeal of value-driven, peer-to-peer and cross-border discount platforms. The sector's share of online retail slips to 29.5%, and **regulatory compliance** costs rise.

Next (2027-28)

Local seller **curation**, embedded AI shopping tools and hybrid delivery options restore loyalty. UK-focused platforms benefit as the **phase-out of de minimis** hikes costs for overseas rivals, shifting more demand to trusted domestic and retailer-operated marketplaces.

Future (2029-31)

As de minimis on imports disappears, discount cross-border sites retrench and UK-centric platforms regain momentum. Market success will rest on blending **recommerce** credentials, **hyper-local fulfilment** and embedded AI assistants for seamless 'commerce anywhere' shopping and checkout experiences as standard.

Opportunities

Curation as a commercial differentiator

With **67% of shoppers preferring carefully selected ranges** over vast assortments, curation is no longer a nice-to-have but a structural differentiator. Marketplaces should evolve from presenting infinite choice to offering a clearer, guided journey that reduces decision fatigue, particularly for younger users who are most likely to feel overwhelmed.

A simple **dual-mode interface** – allowing shoppers to toggle between 'Curated Picks' and the 'Full Catalogue' – can immediately reduce cognitive load and give people control over how they browse. This can be reinforced with **expert-led micro-curation**, where small, clearly justified edits ("Certified by...") highlight the best options in visually saturated categories such as fashion, beauty, DIY and electronics. These edits should be capped at manageable volumes to avoid simply reintroducing clutter.

Curation can also become a **new revenue opportunity**. Retail media packages, paid inclusion and premium placement within certified edits offer monetisation routes that reward quality and relevance rather than scale. These curated experiences should sit across the full customer journey, from onboarding to search, helping reassert the marketplace's role in product discovery at a time when social commerce and **AI-powered search** threaten to bypass traditional browsing paths.

Turn local trust into a competitive advantage

With **87% of consumers** expecting a marketplace to have thoroughly vetted sellers, trust is becoming a defining battleground for marketplaces. Structural conditions now favour UK-centric operators and with the forthcoming abolition of the **de minimis threshold**, operators have a clear opportunity to reposition around local reliability, predictable service and authentic sellers.

Our research also finds **86% of marketplace shoppers** prefer UK-based sellers. Doubling down on **UK-based seller recruitment**, using competitive fees, onboarding support and targeted retail media incentives to expand domestic supply. Stronger seller authentication and clearer verification messaging will help address persistent anxieties around quality, counterfeits and returns, especially as new regulatory frameworks raise penalties for non-compliance. Even global rivals are localising: Temu has started recruiting UK suppliers and AliExpress is expanding its **Local+** logistics with UK warehousing and fast-delivery badging, signalling that 'local' is the next battleground.

Operationally, building **local warehousing, micro-fulfilment and store-network integrations** (eg click-and-collect, integrated locker returns) will offer practical proof of local convenience and help avoid the delays and border friction associated with overseas sellers. Marketing should express this clearly through a proposition built around '**Buy British, skip the border pain**', aligning with consumer desires for reliability, sustainability and community support.

By proactively adapting to regulatory shifts and leaning into national preference, UK marketplaces can turn compliance pressure into a strategic edge that is difficult for overseas discount rivals to replicate.

Evolve from AI tools to AI-driven seller performance standards

As second-hand becomes mainstream and **60% of consumers say it helps them get more for their money**, marketplaces need to ensure that rising participation does not dilute trust or quality. Many AI tools already exist, from photo-to-listing to automated categorisation, but the next competitive step is using AI not to *create listings*, but to **professionalise seller behaviour**, standardise service levels, and lift the entire buyer experience.

Rather than simply offering tools, marketplaces should introduce **AI-driven performance frameworks** that elevate reliability. This means dynamically monitoring listing accuracy, return rates, message response times and delivery consistency, and using these signals to **award seller tiers, visibility boosts and fee advantages**. The emphasis shifts from 'helping sellers upload' to **rewarding sellers who provide an experience that feels retail-standard**, which is where consumer trust gaps remain most acute.

AI can also support **predictive quality control**, identifying high-risk listings or sellers before problems escalate, a major weakness in peer to peer shopping today. Combined with unified fulfilment routes, QR-code postage and locker returns, this creates a buying journey that feels as reliable as first-party retail even when inventory is fragmented.

This approach reframes AI from incremental optimisation to **structural quality uplift** – strengthening trust, improving conversion and ensuring second-hand growth is commercially sustainable rather than chaotic.

THE MARKET

Snapshot – market size and forecast

MARKET SIZE 2025

**£34.1
billion**

is the current estimate for
the gross merchandise
value of sales of online
marketplaces and peer-
to-peer platforms

GROWTH 2020-25

3.7%

is the current estimate for
the growth in gross
merchandise value of
sales of online
marketplaces and peer-
to-peer platforms

Source: Mintel based on company reports & accounts/Mintel

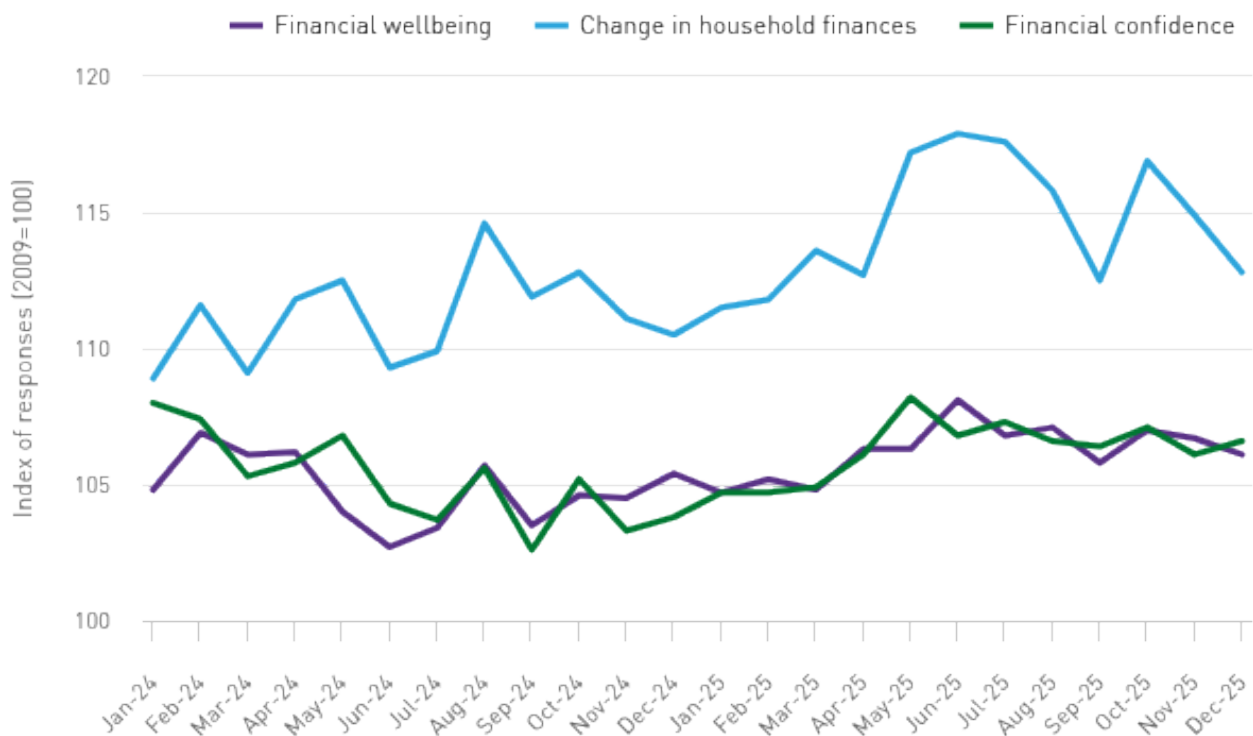
Economic outlook in UK continues to be difficult

The [economic outlook in the UK](#) continues to be difficult, with GDP growth slowing to just 0.1% in Q3 2025 and all three of Mintel's financial confidence indicators dipping in the run up to the late-November Budget, despite an [extended period of real income growth](#).

However, the recovery in household finances is slowly spreading to more income groups, having begun among higher-income households. Now more [people from households with an income of over £50K](#) say they are better off than a year or ago than say they are worse off.

Improvements in household finances are not necessarily good for online marketplaces and peer-to-peer platforms, particularly those focusing on value and/or second-hand items, since lower prices are a key purchase driver. As a result, operators will need to focus on other aspects of their offer in order to retain customers, such as authenticity guarantees, curation and recommerce.

UK: British household financial confidence, 2019-25



Base: 2,000 internet users aged 16+

Source: [Mintel, November 2025](#)

Changes to the 'de minimis' threshold will level the playing field

Currently, goods imported into the UK valued at £135 or less are exempt from customs duty. Critics argue this 'de minimis' threshold has allowed overseas marketplace sellers, like Temu and AliExpress, to ship low-cost goods directly to UK consumers, often undercutting domestic retailers.

In its [2025 Autumn Budget](#), the government announced it will abolish this exemption by March 2029. After that, all imported parcels – regardless of value – will be subject to customs duty and require full customs declarations. The [British Retail Consortium](#) has led a chorus of criticism of the lengthy timeline, asking for it to be implemented sooner. However, logistics firms have warned that scrapping the rule overnight could cause border chaos. The proposed phased approach is intended to give businesses time to adapt.

The move is designed to support UK retailers, address lost tax revenue, and tackle a surge in low-value imports. It comes after the US ended its \$800 de minimis threshold for Chinese goods in May 2025 and for all countries in August 2025. The [European Union will remove its €150 threshold](#) in 2028 and some member countries are introducing parcel admin fees of €2 as early as 2026.

What this means is that UK marketplaces will compete on a more 'level playing field' with overseas marketplaces and sellers after abolition of the threshold.

Many other factors are influencing demand

Legal requirements are tightening

The [Digital Markets, Competition and Consumers Act 2024](#) banned fake reviews and hidden fees, while the [Product Safety and Metrology Act 2025](#) moves marketplaces closer to the legal obligations of store-based retailers for unsafe goods – with fines leveled at those who do not comply.

This gives an opportunity for UK-based operators to highlight that sellers on their platforms are subject to more intense scrutiny than those on overseas ones and thus it makes customers less likely to be scammed.

These measures will reward platforms operating in a safe and fair manner and punish operators who do not conform.

Environmental concerns remain high

While the cost-of-living crisis saw sustainability being deprioritised by [consumers](#) and [brands](#), concern about the environment still remain: with [72% of consumers](#) believing sustainability will become an even greater priority for brands over the next five years.

This is positive for online marketplaces and P2P platforms deriving a high share of sales from resale, because it will help push buyers towards re-use and repair, directly benefiting demand for second-hand goods and making online marketplaces and P2P platforms selling refurbished or pre-owned goods more appealing.

Technology reduces friction, increases trust

A mobile-first user experience, in-app payments, integrated shipping, and artificial intelligence listing tools have removed barriers to casual selling and buying.

AI now powers personalised discovery, image recognition, and fraud moderation, while category-specific authentication (eg trainers/sneakers) is opening up higher-value segments previously held back by counterfeit concerns.

Successful brands will be those that keep investing in technology to build trust, and hybrid fulfilment that makes third-party purchases feel indistinguishable from first-party.

Social media is becoming a significant competitor

Social media is providing an increasingly credible route to market for brands and retailers selling new items and is becoming a significant competitor to marketplaces and P2P platforms as a result..

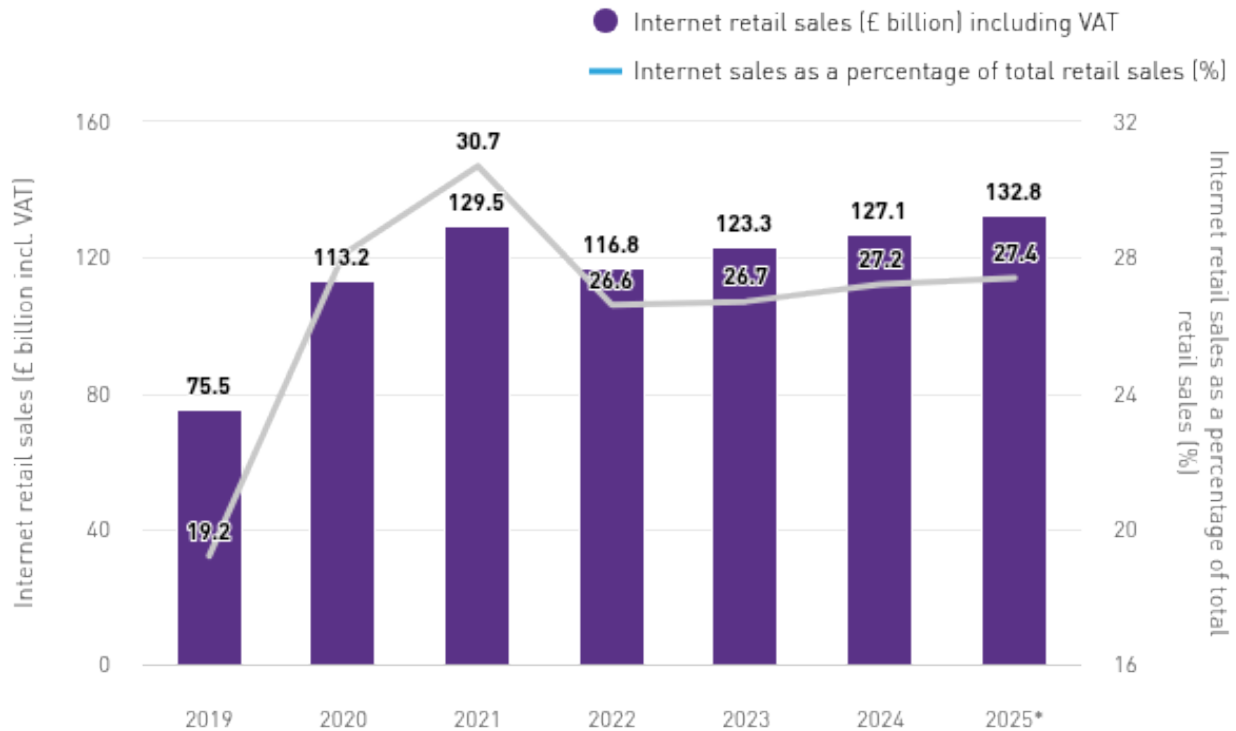
This is being led by the rapid growth of TikTok Shop, which reported a [131% annual increase](#) in the number of shoppers and a 180% year-on-year rise in revenue in 2024.

As of March 2025, it had over 200,000 active sellers, the majority SMBs, double the amount from the same time in 2024. Major brands using it include L'Oreal, Zalando, ASOS and Lidl.

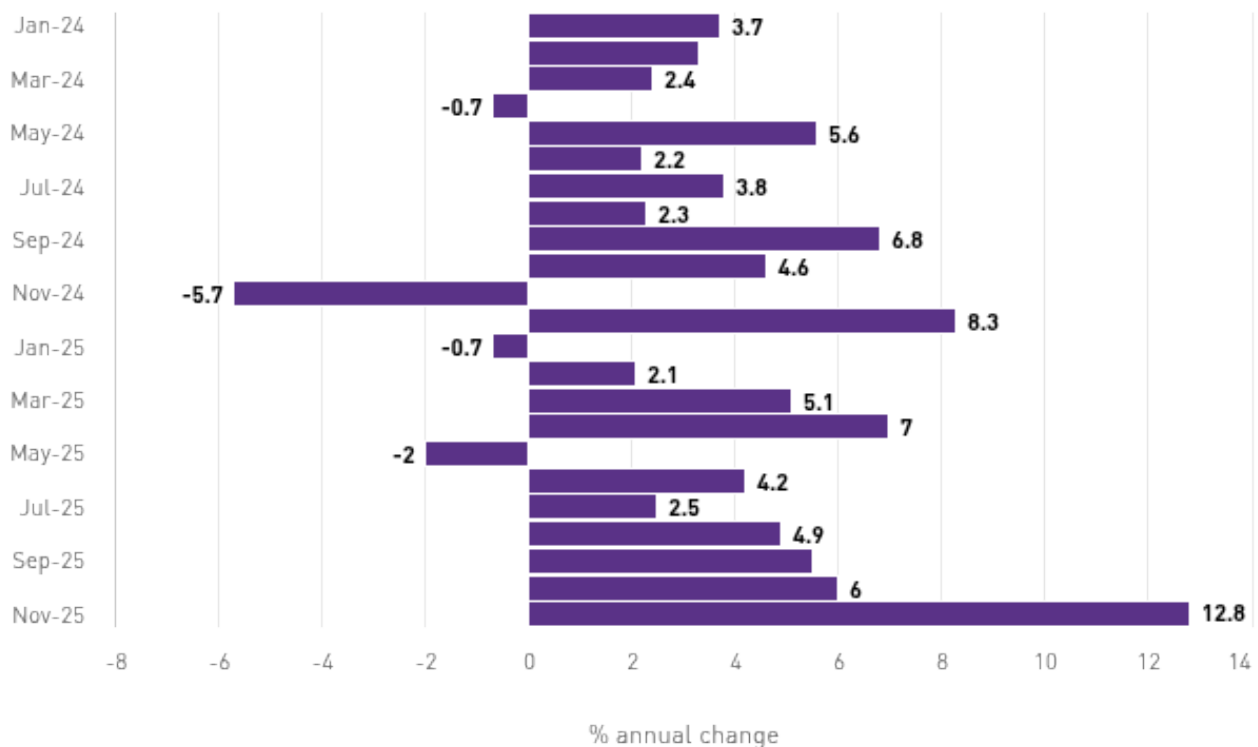
Online retail sales continue their recovery

After losing share in the wake of the pandemic, online sales have grown as a percentage of total retail sales every year since 2023.

UK: trends in online sales and online sales as a percentage of total retail sales, 2019-25



UK: annual changes in online retail sales**, by month, January 2024-October 2025



* moving annual total to November 2025; ** average weekly value

Source: Office for National Statistics (ONS)/Mintel

Online retail sales trends

On a moving annual total basis (as of October 2025) online retail sales are worth £132.8 billion at retail selling prices (£116.0 billion excluding VAT), which is 4.5% higher than the value seen for the full calendar year 2024.

Since 2023, online sales have grown faster than total retail sales, with the result that online's share has increased steadily, from 26.7% to 27.3%. We expect that, with continued improvements that make it easier and more convenient to shop online, this trend will continue between 2026-29.

The [removal of the 'de minimis' threshold](#), when it comes, will effectively eliminate the ultra-value segment of the market and level the playing field in terms of prices UK and overseas retailers are able to offer.

2025
**£34.1
billion**

estimated GMV sales
of marketplace and
peer-to-peer sites in
the UK

Combined sales of leading marketplace and peer-to-peer operators were up 3.7% in 2025

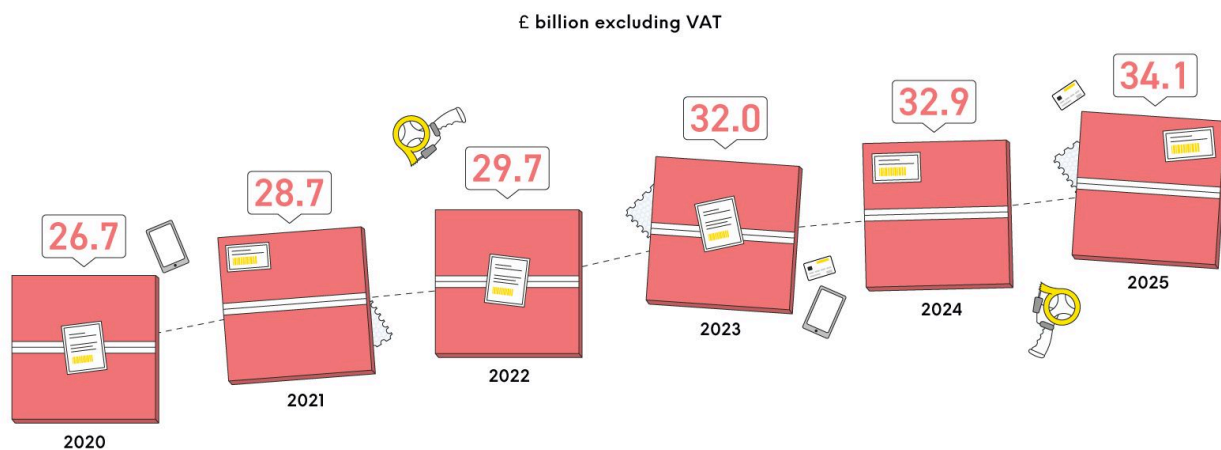
Our current estimates suggest growth of 3.7% between 2024-25 to reach a value of £34.1 billion, slightly below the expected 4.5% growth in total online sales. This is likely to see a small decline in the share of total online sales accounted for by online marketplaces and peer-to-peer platforms, to 29.5%.

As consumer finances gradually start to improve again, the financial rationale for buying and selling via these channels is reduced. Instead, to retain customers as their finances improve, operators must pivot to focus on the sheer breadth of range they can offer, the reassurances they have put in place when it comes to authenticity of the goods they sell, making the purchasing process as frictionless as possible and providing as many options for receiving goods bought as possible.

Source: Mintel based on company reports & accounts

Market valued at £34.1 billion in 2025

UK: estimated sales of online marketplaces* and peer-to-peer platforms, excluding VAT, 2020-25



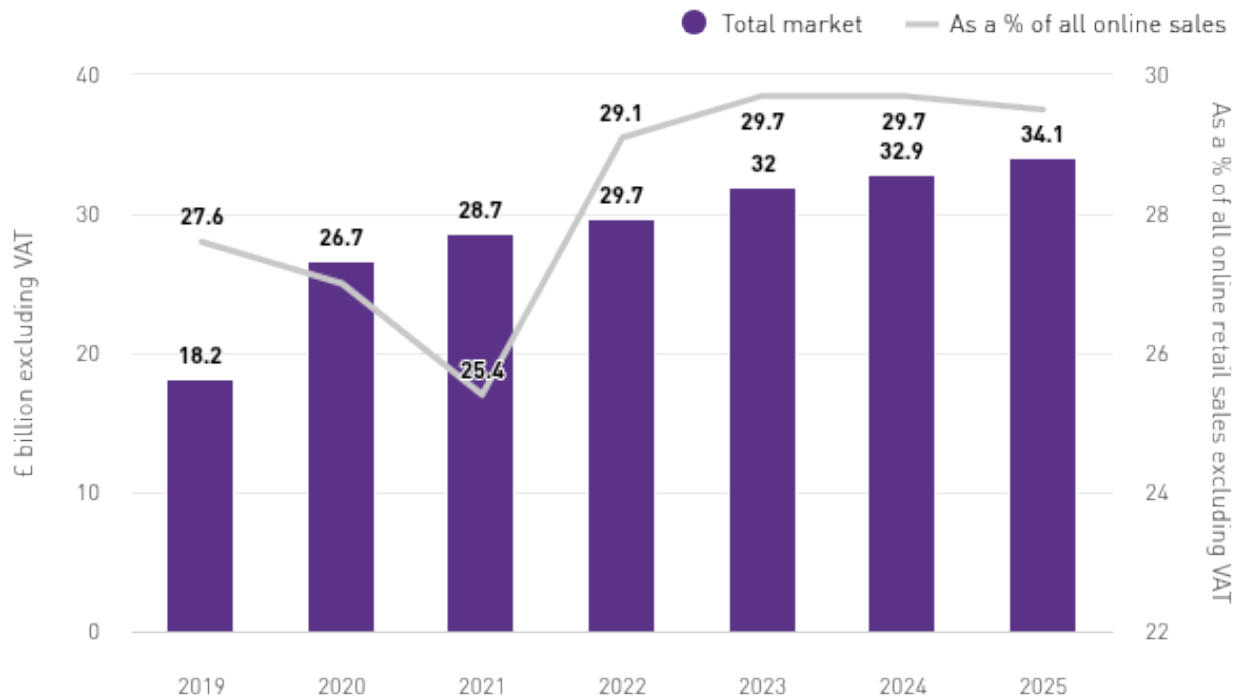
These figures are for online-only marketplaces and peer-to-peer platforms and exclude marketplace sales of store-based retailers. Please see appendix for details of [market size methodology](#).

Source: Mintel based on company reports & accounts

Online marketplaces and peer-to-peer platforms take almost a third of online spending

As consumers' financial situations gradually improve, the sector's share of total online sales plateaued in 2024 and it is set to decline slightly in 2025.

UK: estimated sales of online marketplaces* and peer-to-peer platforms, excluding VAT, 2019-25



These figures are for online-only marketplaces and peer-to-peer platforms and exclude marketplace sales of store-based retailers

Source: Mintel based on company reports & accounts

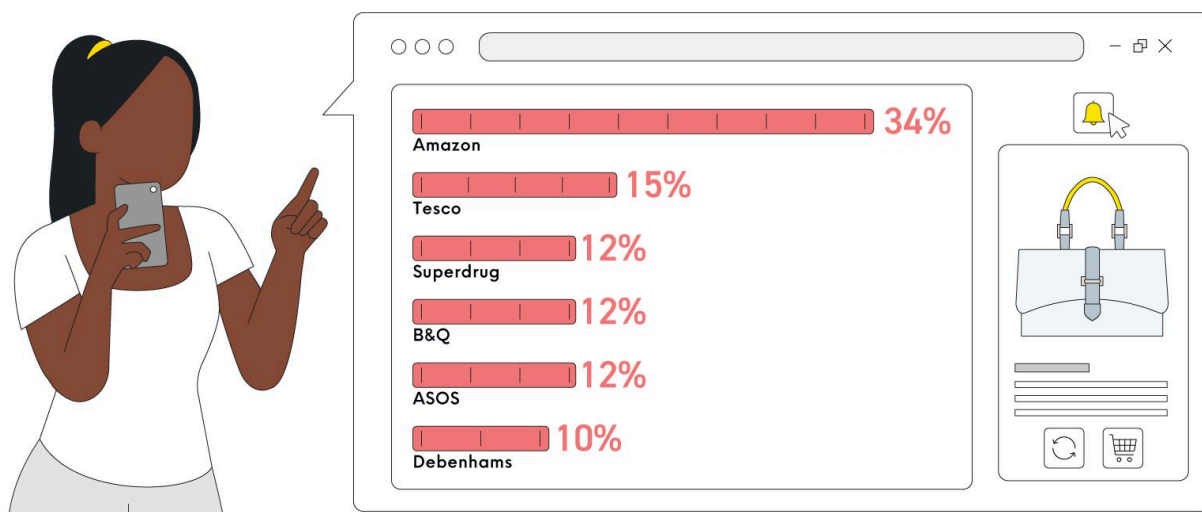
THE CONSUMER

For consumer survey questions, see the [Appendix](#)

Who shops with marketplaces and on peer-to-peer platforms

New momentum among retailer-run marketplaces

UK: marketplace shoppers at leading retailer-hosted marketplaces, 2025



Base: 1,939 internet users aged 16+ who shop online

Source: Mintel, October 2025

Online shoppers at retailer-run marketplaces skew clearly younger

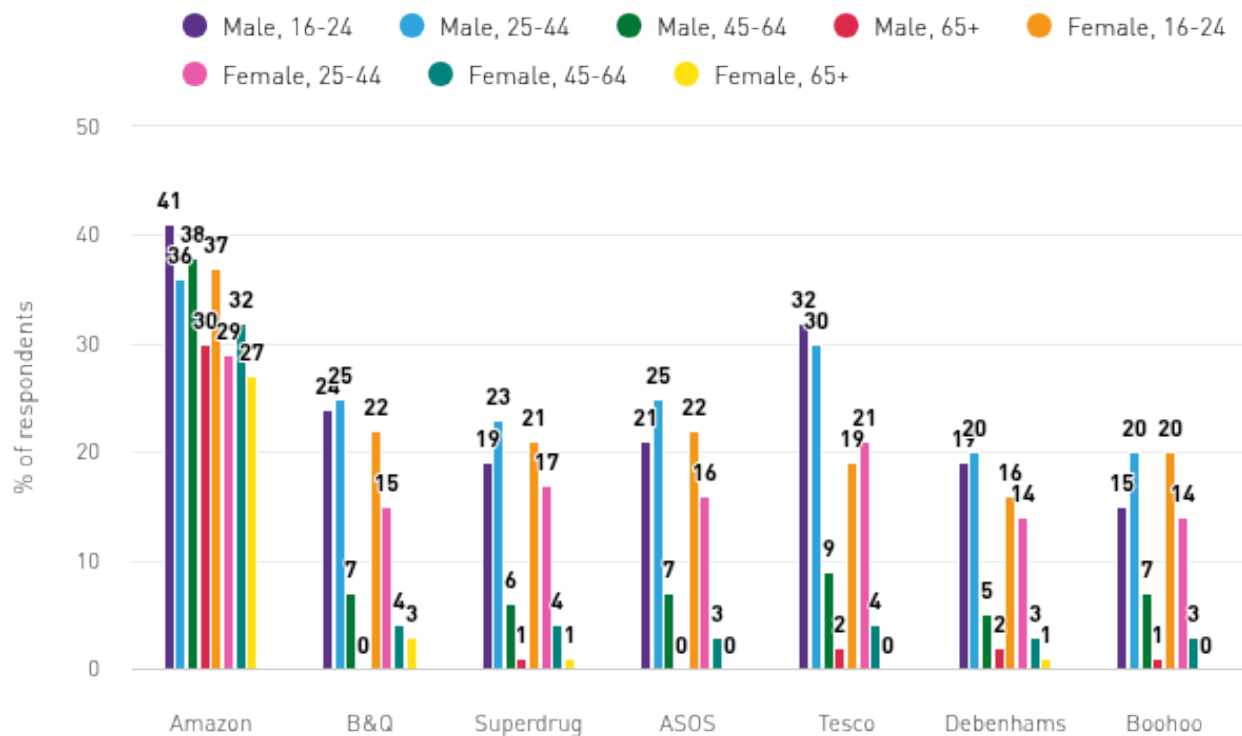
B&Q strongly overindexes among men aged 16-44.

Superdrug also leans young, with both young men and women over-represented, reinforcing its appeal among style- and beauty-driven 16-44s.

ASOS shows the sharpest youth skew, with significant over-representation among 16-24s and younger adults up to 44.

Marketplace participation is clearly concentrated among younger shoppers, highlighting opportunities to deepen relevance for 16-44s while addressing the barriers faced by mid-life and older consumers.

UK: demographics of shoppers at leading retailer-run marketplaces, by gender and age, 2025



Base: 1,939 internet users aged 16+ who shop online

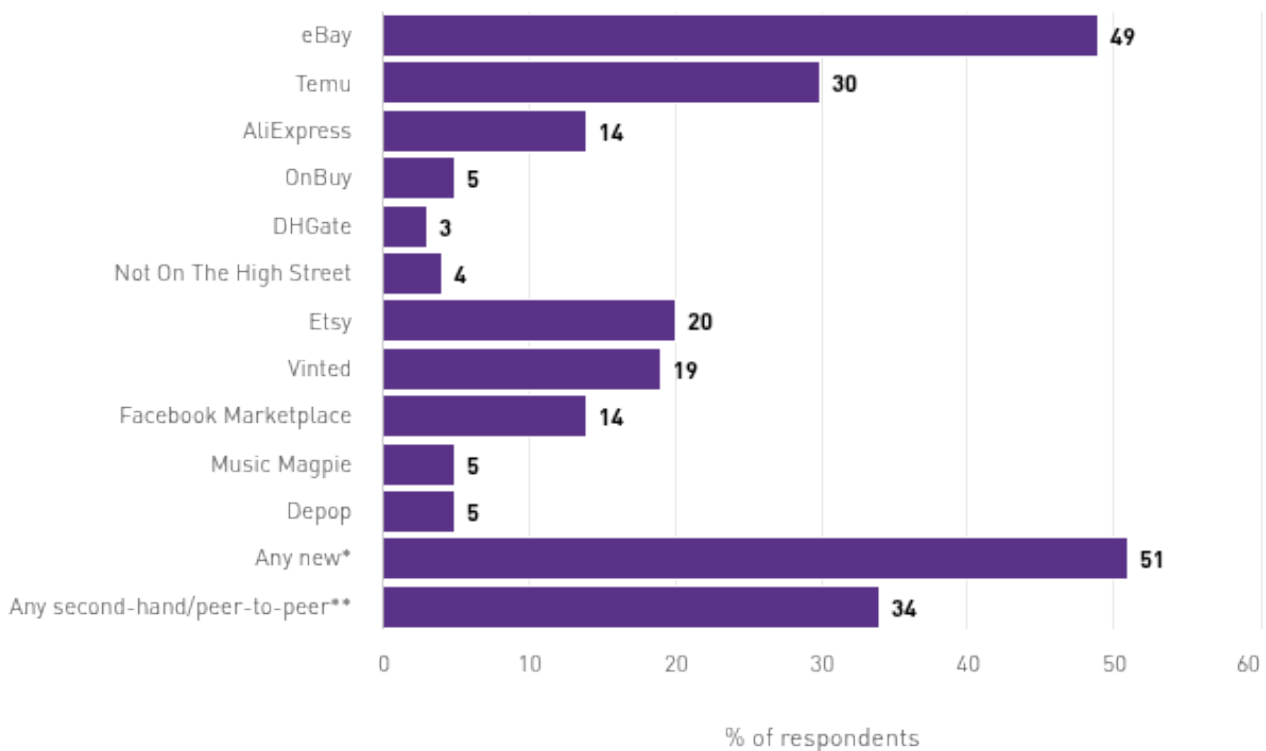
Source: Mintel, October 2025

Other marketplace choices reflect changing shopper priorities

eBay remains the leader in UK marketplace shopping, its success coming from a huge range availability, competitive pricing and strong buyer protections.

Features like managed payments, authenticity guarantees and quick dispute resolution make second-hand shopping there easy and reliable. A mobile-first experience and simple listing tools keep inventory fresh, attracting casual and professional sellers alike.

UK: marketplace shoppers at leading peer-to-peer, new and second-hand marketplaces, 2025



* Etsy/Temu/AliExpress/Not on the High Street/DH Gate/OnBuy/Other new marketplace; ** Vinted/Facebook/MusicMagpie/Depop/Other second-hand

Base: 1,939 internet users aged 16+ who shop online

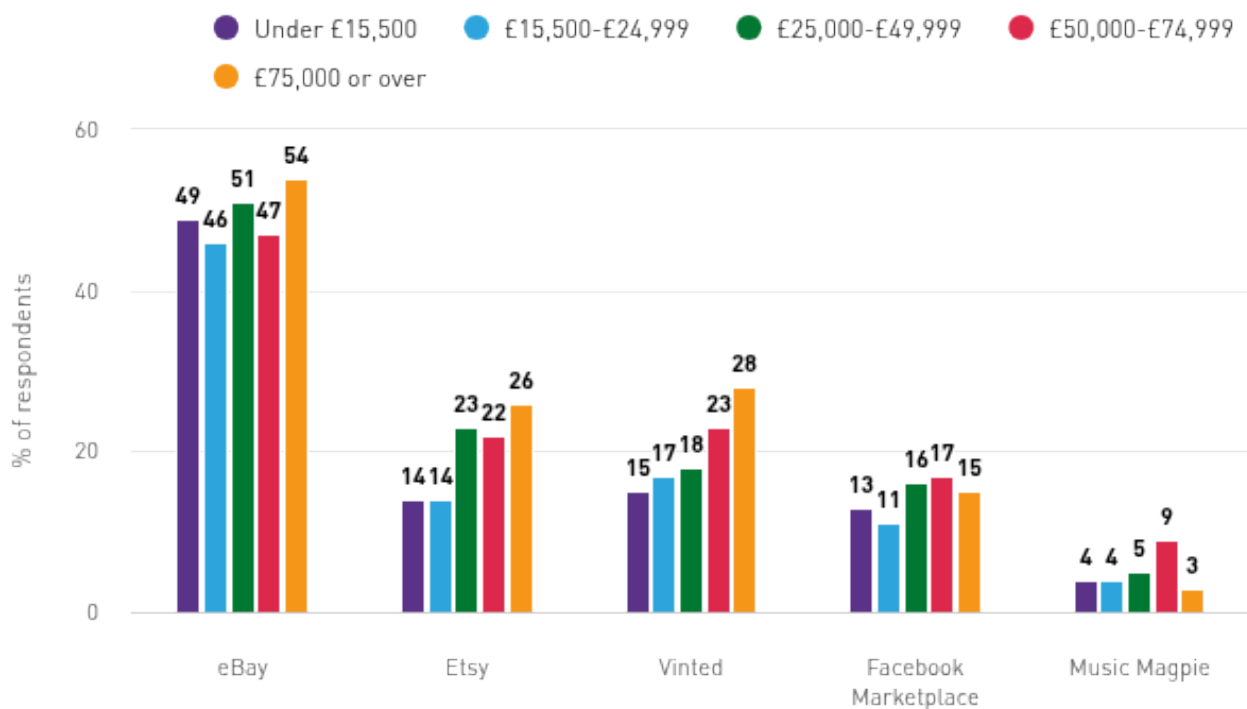
Source: Mintel, October 2025

Marketplace shopping is well established and motivated by more than saving money

Households earning £75K+ are the most engaged demographic shopping at eBay, Etsy and Vinted, highlighting that recommerce is not just a fallback during tough times but also an accepted choice for the affluent (who often seek luxury deals or sustainable options).

While 60% of consumers say buying second-hand helps stretch their budget, most would continue using these platforms even with improved finances, a trend seen among those with healthy finances, as well as those who are struggling.

UK: demographics of shoppers at leading peer-to-peer/second-hand marketplace operators, 2025



Base: 1,939 internet users aged 16+ who shop online

Source: Mintel, October 2025

Platforms must cater to the needs of a diverse range of shoppers

This signals a more permanent behavioural change among more affluent demographics, similar to the enduring popularity of discount stores in the grocery sector. To keep higher-income buyers engaged as their spending power grows, platforms will need to expand the elements they already value; stronger authenticity checks for premium goods, clearer fraud prevention, faster and more reliable fulfilment, and a smoother end-to-end experience that feels closer to traditional retail. Meeting these expectations will help ensure affluent buyers continue treating recommerce as a first-choice channel, not a temporary tactic to save money.

Alongside cost-conscious users looking for low fees and strong value, there is a growing cohort of style-, eco- and quality-focused shoppers, including higher-income buyers, who will expect a more polished experience.

To meet these different motivations, platforms will need clearer seller standards, transparent pricing, category-specific authenticity checks for premium items, and delivery and returns options that feel closer to mainstream retail. Offering these layered experiences will help recommerce cater to both bargain hunters and affluent shoppers who now see second-hand as a deliberate and desirable way to shop.

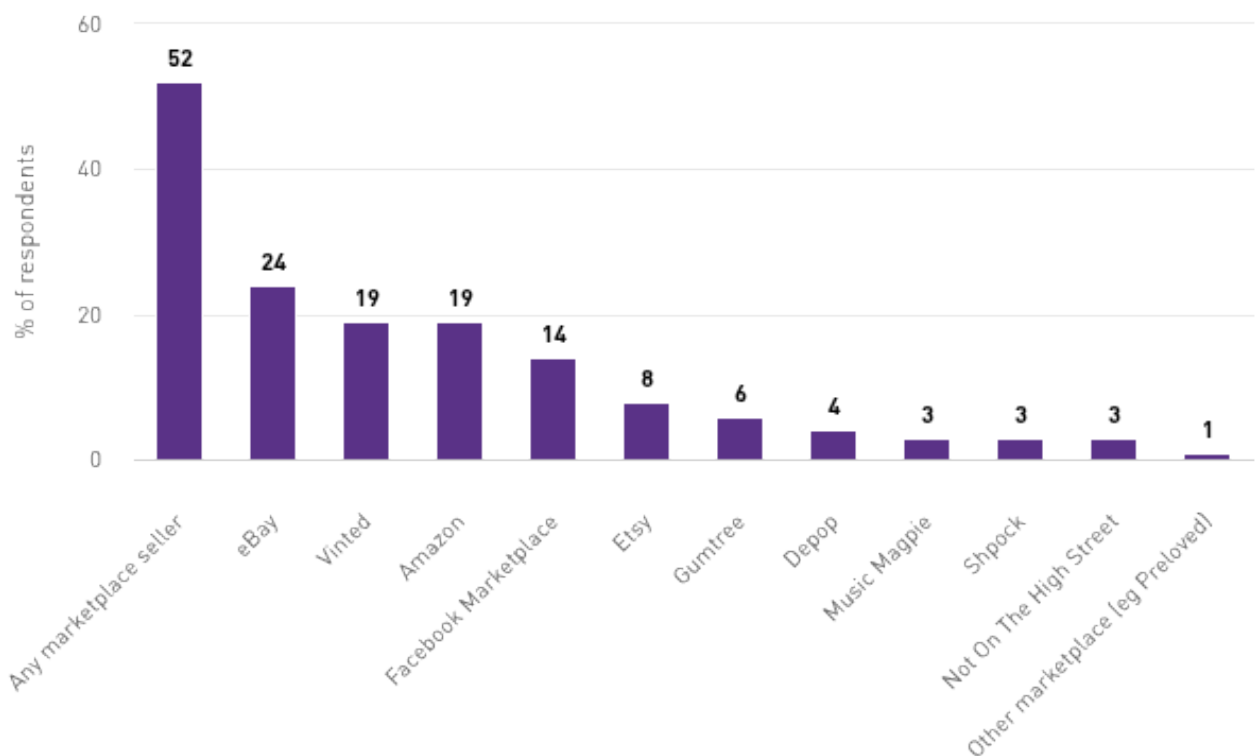
The rise of resale retailing

eBay holds the lead as specialist and social platforms rise

eBay remains the dominant selling platform, but specialist and social platforms are gaining ground. Vinted's growth is especially notable, [used by 19% of consumers in 2025](#), compared to just 8% in 2022. It has attracted sellers with a no-fee model and a strong focus on fashion, tapping into the mainstreaming of second-hand clothing and Gen Z's preference for resale. The addition of other categories, such as toys and electricals has widened its appeal.

Facebook Marketplace and Etsy also have significant shares, reflecting the importance of local, social and craft-focused selling. The diversity of platforms (including Gumtree, Depop, Music Magpie, Shpock, Not On The High Street and others) shows how the market is fragmenting to serve different niches and demographics.

UK: sellers at second-hand and peer-to-peer marketplaces, 2025



Base: 2,000 internet users aged 16+

Source: Mintel, October 2025



Selling activity is less common than buying

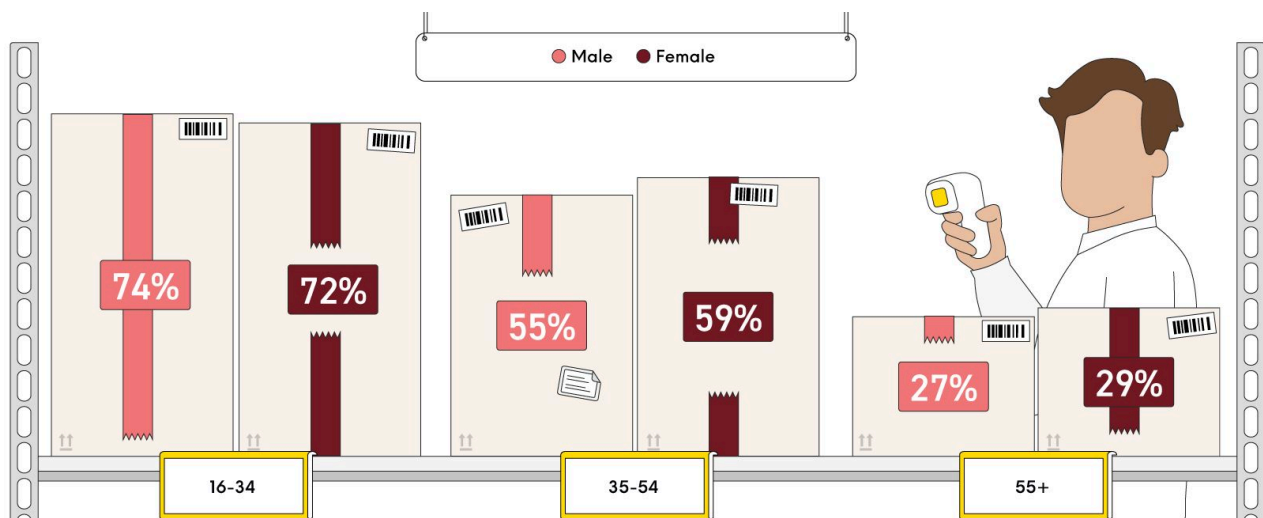
Selling personally is less widespread than buying, but still **52% of consumers** had done so over the last year, with **younger consumers** and higher earners showing a higher propensity to do so.

Selling is skewed towards younger demographics, with 16-34 year olds dominating participation. This reflects their **comfort with digital platforms**, ease with mobile-first selling tools and their familiarity with **second-hand culture**. This reinforces the need for platforms to keep investing in simple, intuitive listing and payment experiences that match how younger users expect to sell.

Engagement drops sharply after 55, highlighting barriers like digital confidence and perceived effort. This suggests that platforms need simpler listing journeys, clearer guidance and more trusted seller protections if they want to widen participation beyond younger users.

Younger men are the most likely to sell products online

UK: "any marketplace seller", by gender and age, 2025



Base: 2,000 internet users aged 16+

Source: Mintel, October 2025



Royal Mail's postbox of the future

Private sellers becoming more professional

A growing number of private sellers are adopting business-like practices – using better photography, detailed descriptions, and even offering returns – to attract buyers and build trust.

Algorithmic tech that highlights trending items or 'picked for you' selections can spark impulse buys, much like [TikTok's 'For You' page](#). These social-tech features make P2P shopping more interactive and engaging. As a result, users might browse without a specific purchase in mind, similar to scrolling through Instagram.

Platforms are adding features to improve professionalism, eg seller ratings, buyer protection and integrated shipping. Vinted and eBay now offer tools like postage integration, seller analytics and promotions similar to small business tools. eBay has also launched its [Managed Payments](#) system, handling card payments and Apple Pay directly, creating a more Amazon-like checkout experience that consumers are increasingly expecting.

Furthermore, the growing accessibility of different dispatch and collection points, such as InPost parcel lockers and the new postbox, is also making the whole process much more convenient.

P2P fuelling micro-entrepreneurship

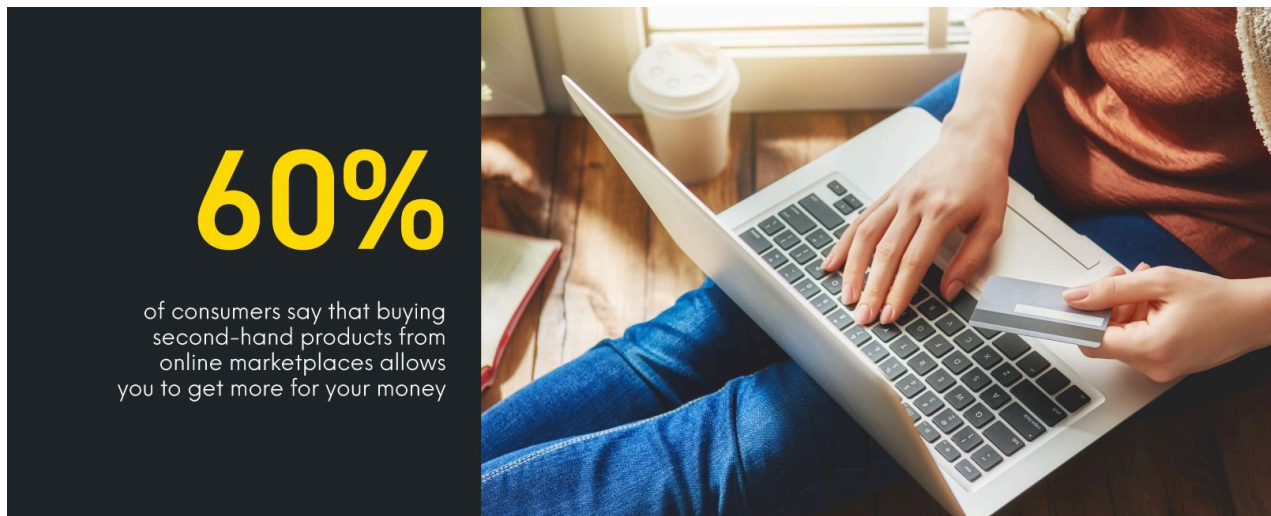
A notable economic aspect of P2P selling is how it enables micro-entrepreneurship. Thousands of UK residents now supplement their income – or even earn a living – by 'pro trading' on P2P platforms.

For example, a savvy seller might frequent charity shops or clearance sales, then flip items online for profit, essentially running a one-person retail business via eBay or Depop. The government has recently drawn attention to the fact that [anyone earning over £1,000](#) from 'side hustles' must declare income, with plans to raise this threshold to £3,000 and simplify reporting for smaller traders. Digital platforms now share earnings data with HMRC, making undeclared income easier to detect.

Platforms must consider the needs of these 'power sellers' – many of whom now expect more professional tools (analytics, bulk listing interfaces, shipping integration) and will gravitate to marketplaces that treat them well.



Value for money is an important driver for second-hand marketplace purchases



Base: 2,000 internet users aged 16+

Source: Mintel, October 2025

Multiple drivers underpin the appeal of P2P platforms

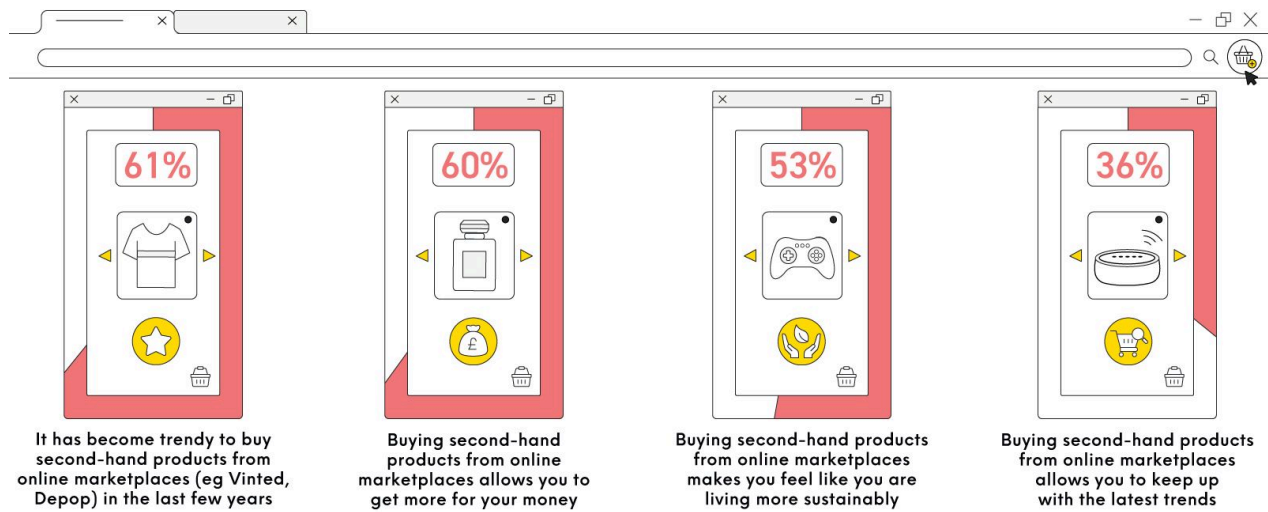
Buying second-hand is often driven by the thrill of saving money or finding quality items at a fraction of retail price. This overlaps with economic motive but is also a cultural aspect. Britain has a long car-boot sale and charity shop tradition, and online P2P is the digital extension.

Youth culture is a driving force, with younger generations embracing resale for moral, style and budget-friendly reasons, as well as finding unique fashion. Platforms like Depop and Vinted have capitalised on this by creating app experiences that feel like social networks, where users curate personal 'shops' and build style-driven communities.

Environmental and ethical motives are rising rapidly as consumers seek ways to live more sustainably. [Younger generations and families](#) embrace the idea that extending a product's life reduces carbon impact, while many avoid fast-fashion brands or support local sellers. This gives these platforms a positive moral dimension and fosters loyalty beyond price. Here's also a growing sense of community in peer-to-peer shopping, as consumers seek out more personal interactions. Such transactions often feel more meaningful than buying from large corporations, reinforcing trust and social bonds.

Second-hand is now mainstream

UK: attitudes to buying and selling second-hand, 2025



Base: 2,000 internet users aged 16+

Source: Mintel, October 2025



Traditional retailers are raising the bar

As resale establishes itself in the mainstream, and retailers such as [Levi's](#) and [Zara](#) launch in-house resale, competition is intensifying and raising consumer expectations for quality and experience. These additions effectively build P2P into their own offer, further normalising it in retailing

When building a second-hand offer, retailer-run operations should seek to frame second-hand as aspirational, not budget-driven. Marketing should emphasise style, sustainability and uniqueness, not just affordability, especially for luxury and collectible categories.

Driving higher standards in premium recommerce

To build this premium image, factors such as curated edits (eg 'editor's picks', seasonal drops) and high-quality photography can replicate the polish of new-product marketing. Patagonia's [Worn Wear](#) and Lululemon's [Like New](#) show how storytelling around product journeys and condition grading can elevate pre-owned items; UK retailers could adopt similar narratives in fashion, home and even electronics.

There are also opportunities to build recommerce-ready ranges (with an eye to future condition grading, repairability and information on authenticity and provenance). Some luxury goods, such as [Gucci](#) are incorporating technology such as pre-configured NFC authenticity tags, that are integrated into the product to help verify its authenticity and provide product information, with scope for this to be used in other, less high value categories such as upmarket fashion brands or high quality electrical items.

Emulating dealers of second-hand cars, where some have moved beyond simple listings to offer curated, brand-aligned selections and after-sales support. Second-hand car brands often encourage trade-ins and highlight future resale value. Fashion and luxury retailers can adopt similar models, encouraging customers to trade or recycle items, and even offering personalisation or resale value tracking as added incentives.

The trust challenge in marketplace shopping

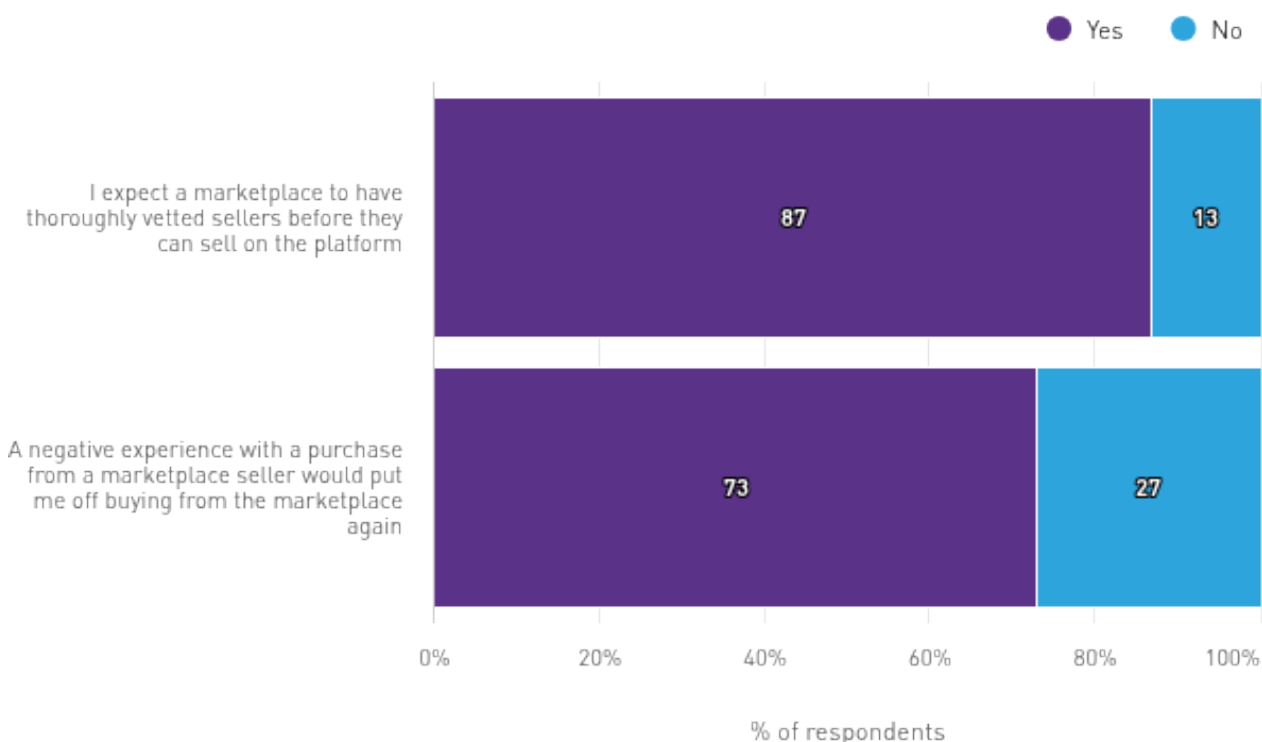
Trust is a vital element

Trust is a critical battleground in engaging consumers with a retailer-run marketplace or peer-to-peer site. Media coverage of [scams, counterfeits and fraud](#) is widespread, and while some platforms provide cheap prices, there is widespread consumer anxiety about quality, returns and service.

There are also social trust issues in peer-to-peer exchanges – people worry about getting scammed, receiving items not as described, or dealing with strangers.

As marketplaces add more third-party sellers, services and cross-border options, the risk of inconsistent experiences rises. As we see in the Mintel Trend [Prove It](#), consumers are quick to penalise retailers and platforms for negative encounters – it only takes one negative experience to deter someone from returning.

UK: trust related attitudes to marketplace shopping, 2025



Base: 1,618 internet users aged 16+ who have bought products from an online marketplace in the last 12 months

Source: Mintel, October 2025

Vast majority prefer to buy from UK-based marketplace sellers



Base: 2,000 internet users aged 16+

Source: Mintel, October 2025

Marketplaces can use localism to counteract concerns about buying from abroad

Against the backdrop of [ongoing disruption](#) to global supply chains, consumer trust in overseas sellers remains fragile. With [79% of online marketplace shoppers](#) saying that worries about poor customer service would make them less likely to buy from an overseas marketplace seller, [localism](#) is emerging as a powerful differentiator for UK marketplaces.

Platforms and retailers are doubling down on UK-based seller networks, local warehousing and domestic logistics to mitigate risks from tariffs, regulatory changes and currency fluctuations. This approach not only improves operational resilience, but also aligns with consumer sentiment favouring local and domestic brands and services

Even global players are adapting. [Temu](#) has launched a UK-local supplier strategy, recruiting domestic sellers to offer faster delivery and support local businesses. [AliExpress](#) is following suit, expanding its Local+ logistics service and opening its platform to UK-based suppliers, with products stored in local warehouses and marked with a 'Local+' badge for fast, reliable delivery.

UK marketplaces should promote 'local trust' as USP, using marketing narratives that emphasise supporting UK businesses. They could also leverage local sourcing as a brand story, tapping into the growing consumer desire for sustainability and community support.

Convenience as a growth engine

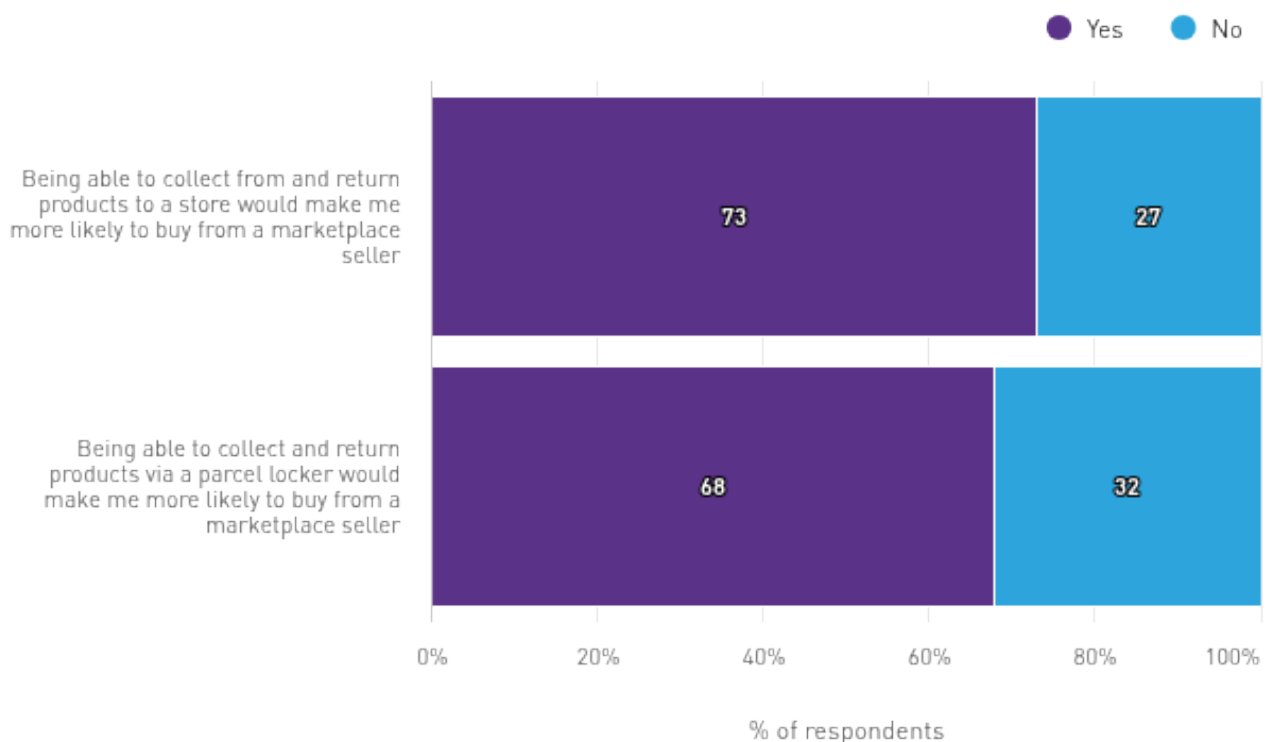
Convenience is becoming a differentiator

Convenience is a primary growth engine for online marketplaces. UK shoppers increasingly demand frictionless, time-saving experiences across the entire journey, from product discovery to purchase and fulfilment.

This is particularly important for **busy urban professionals**, families managing multiple schedules, and younger consumers who expect digital-first, mobile-enabled experiences.

Retailers and platforms need to prioritise convenience at every touch point – integrating technology, partnerships, and flexible delivery and collection options to meet these rising expectations.

UK: convenience-related attitudes to marketplace sellers, 2025



Base: 1,618 internet users aged 16+ who have bought products from an online marketplace in the last 12 months

Source: Mintel, October 2025

Enhancing convenience in second-hand

Improving access to locker networks for pick up and drop off to marketplace buyers and sellers is making second-hand transactions easier. [Royal Mail and Vinted](#) recently expanded their partnership, allowing members to collect and send orders via Royal Mail's 2,000 lockers and nearly 8,000 Collect+ Parcelshops across the UK.

[Royal Mail's](#) modernised, solar-powered postbox, with a larger opening for parcels, a barcode scanning system, and the ability to request proof of posting via the Royal Mail app, will also expand the number of drop off points to sellers.

There is scope for resale platforms to offer concierge or 'done-for-you' services for busy or affluent users looking to sell their used items. In the US, for example, [ThredUp's Clean Out](#) service removes all friction for sellers – just send in a bag, and ThredUp does the rest.

Backmarket's first physical retail store in New York also hints at potential for an omni-channel approach to buying refurbished.



[Backmarket](#) has opened its first retail store in New York.



Omnichannel and loyalty perks can enhance convenience at retailer-run marketplaces

As most retailer-run marketplaces have been set up in response to Amazon, they need to build and enhance their offer not only in terms of range, but also in the convenience of shopping with them.

They should leverage the things that Amazon does not have, including their store networks to make the purchase experience easier and quicker. [B&Q](#) for example recently launched a click and collect (and returns) service for select products sold by third-party sellers on its marketplace.

[Tesco](#) now allows shoppers to earn Clubcard loyalty points on all marketplace purchases at the same rate as groceries, enabling it to keep non-food spend inside its ecosystem instead of leaking to other retailers.

Development opportunities here could include enabling loyalty points redemption at marketplace sellers and member-only pricing or discounts on third party purchases.

A single reliable touchpoint for shoppers at retailer-run marketplaces

The next phase for retailer-run marketplaces will move beyond expanding product ranges. Growth will come from **strengthening trust** through clear seller standards, consistent quality checks and convenience that feels genuinely better than online-only players.

A practical opportunity lies in building **integrated fulfilment**, using stores to offer returns, collection and combined delivery for both the retailer's own range and marketplace sellers. This gives shoppers a single, reliable touchpoint and removes much of the friction that comes with buying from multiple third parties.

Implementing this would mean onboarding only sellers whose stock can be routed through the retailer's existing logistics network, aligning packaging and returns processes, and enabling shoppers to track mixed baskets in one place.

Over time, this could evolve into curated marketplace zones in high-traffic stores, allowing customers to discover third-party products in-person while still benefiting from the retailer's fulfilment and service guarantees. This is a realistic way for supermarkets and other store-based retailers to differentiate from Amazon and emerging disruptors, using assets competitors cannot easily replicate.

Base: 1,618 internet users aged 16+ who have bought products from an online marketplace in the last 12 months

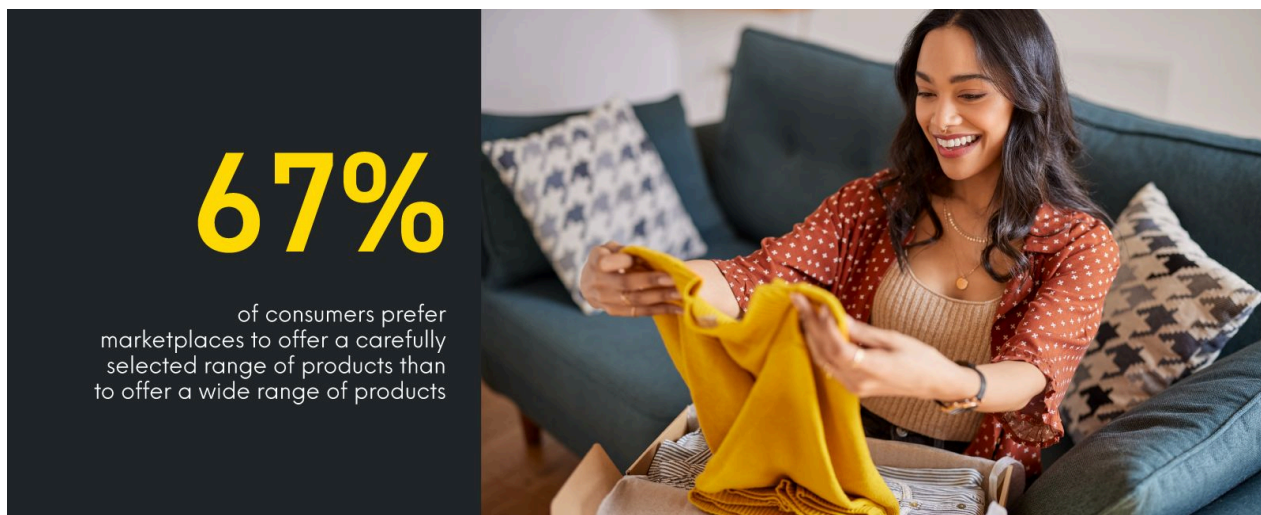
Source: Mintel, October 2025

69%

of UK marketplace users say their favourite retailer offering a marketplace on their website would make them shop with that retailer more often

From choice overload to curated commerce

Two thirds prefer curation over choice



Base: 1,618 internet users aged 16+ who have bought products from an online marketplace in the last 12 months

Source: Mintel, October 2025

Curation vs all things

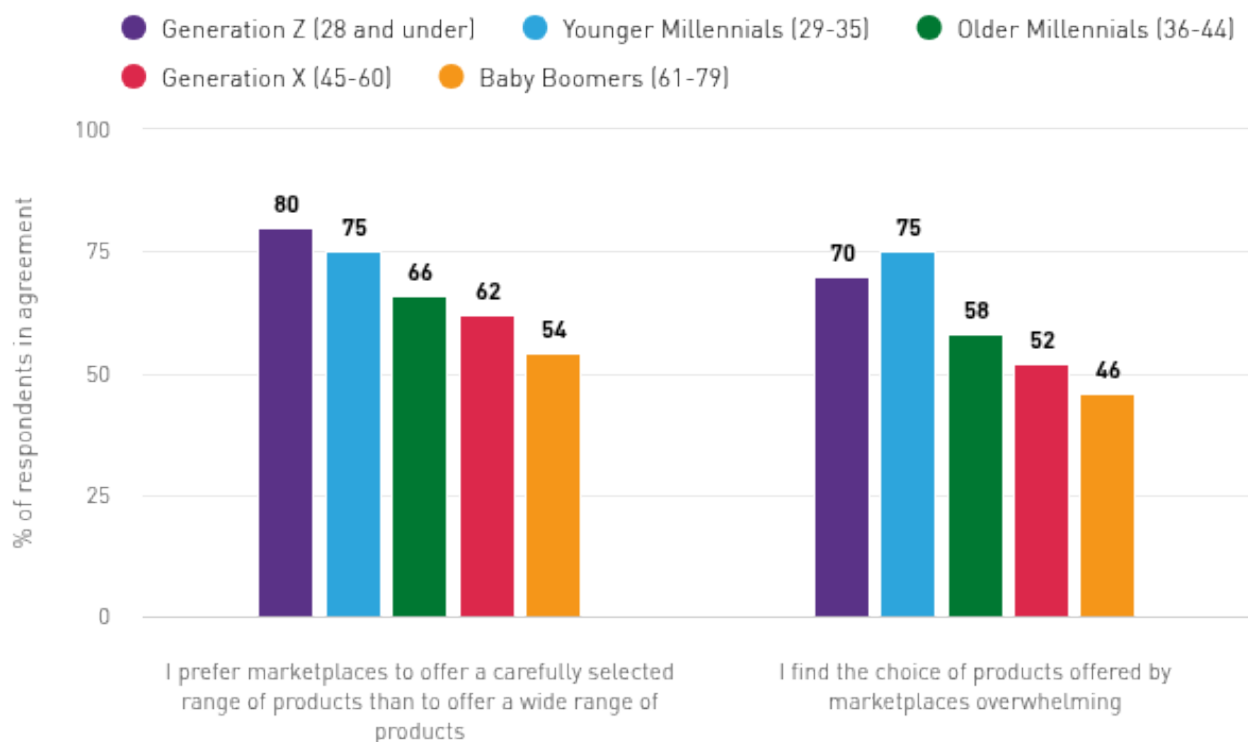
The 'endless aisle' is a double-edged sword. While marketplaces like Amazon, eBay and Temu attract shoppers with vast assortments, the sheer volume of options can paralyse decision-making and reduce satisfaction.

This can lead to basket abandonment, lower repeat rates and negative perceptions of the platform.

Gen Z are much more likely to feel overwhelmed and prefer a marketplace with pared down ranges. They are the most active users of online marketplaces and social platforms, and encounter a much larger volume of products, ads and recommendations daily, which increases decision fatigue.

This perhaps goes against the high levels of usage of sites like Temu [among younger generations](#), but is equally an indicator of some of the negatives associated with this kind of retail.

UK: attitudes to choice when shopping on marketplaces, 2025



Base: 1,618 internet users aged 16+ who have bought products from an online marketplace in the last 12 months

Source: Mintel, October 2025

Turning overwhelm into opportunity

To combat this potential overwhelming of consumers, an approach from managing sellers to **managing shoppers' cognitive load**, empowering shoppers by giving them control over their choices. A simple toggle, like 'Curated Picks' for guided shopping and 'Full Range' for bargain hunters or power users, allows customers to instantly switch between a tightly edited selection and the full catalogue. By framing this as a time-saving convenience feature, marketplaces can empower users to choose between fewer, better options or the entire assortment, helping them avoid decision fatigue.

As Mintel trend [Guiding Choice](#) explores, another powerful approach is certified micro-curation. This would involve presenting small, expert-led edits, capped at around 25 items to ensure the best options stand out. These selections, clearly labelled as a clear 'Certified by [Expert]' label and a short why-this-made-the-cut. The promise is **fewer, better choices** that save time and build confidence. This strategy is particularly effective in sectors like fashion and beauty for clarifying trends, DIY and home for achieving project goals, and tech for identifying reliable accessories. By positioning bundles and filters as ways to 'shop smarter, not harder', marketplaces can significantly enhance the customer experience.

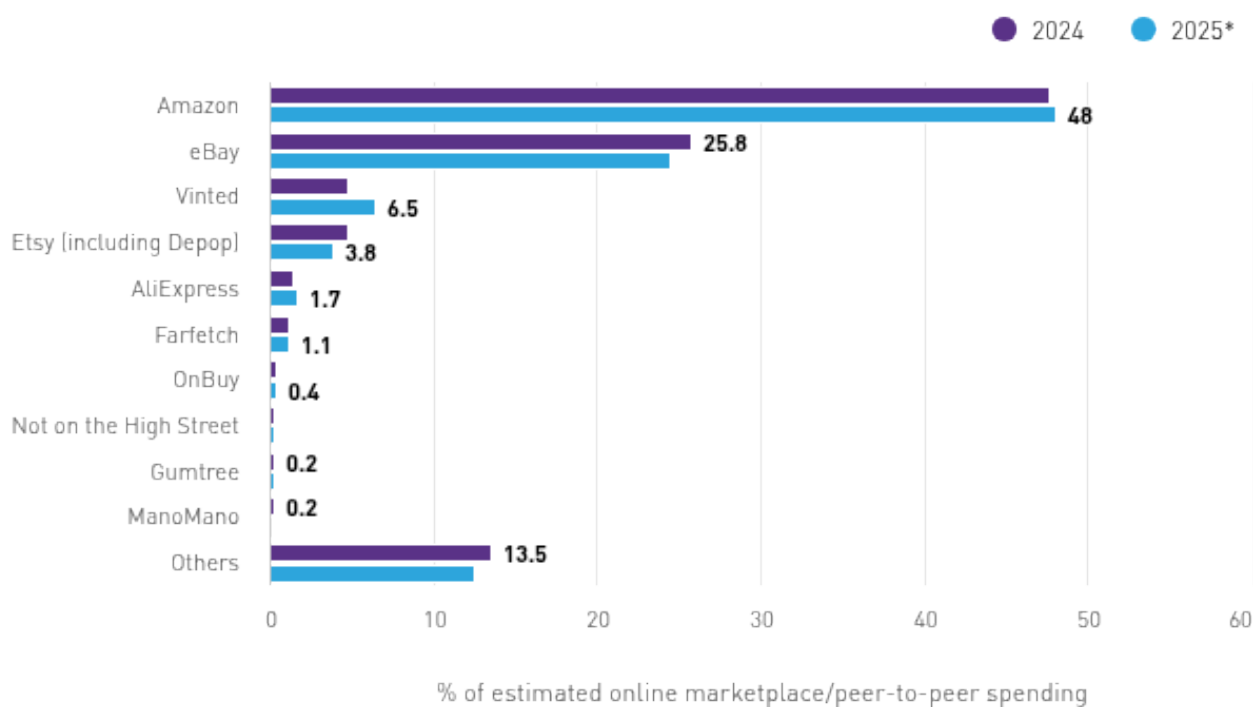
RETAILER ACTIVITY

Leading retailers and platforms

Amazon stretches its lead

Amazon Marketplace now accounts for approaching 50% of pureplay online marketplace/peer-to-peer spending in the UK, while eBay has seen its share fall back slightly.

UK: estimated share of total GMV of leading identified marketplace and peer-to-peer sites, 2024 and 2025*



* 2025 figures are estimates

Source: Mintel based on company reports and accounts

Amazon shifts its stance on working with third-party AI

Amazon gains ground but AI is changing how people shop

We estimate Amazon's UK marketplace sales grew by 15.1% in 2024, slightly down on 2023.

Mintel's estimates based on interim reports suggest much lower growth of around 6.5% in 2025. We think this is due to increased use of AI assistants and chatbots, which direct users to other marketplaces.

Platforms such as ChatGPT have become critical in the information search part of the purchase journey but OpenAI, and others, want to control more of the purchase journey funnel, ultimately allowing in-platform checkout.

Although it has strongly resisted doing so to date, it appears that Amazon has accepted that it will have to work with the leading AI platforms if it is not be left behind.

eBay move to drop seller fees slows sales fall

The UK is eBay's second largest market after the US, accounting for 13.9% of its net dollar revenues in the first nine months of 2025, down from 15.3% in the same period of 2024.

In 2024, we estimate that eBay's UK GMV revenues fell by 6.7%, mainly due to challenging macroeconomic conditions and lower consumer confidence. Its October 2024 decision to drop selling fees for private sellers meant net revenues fell by 7.6%.

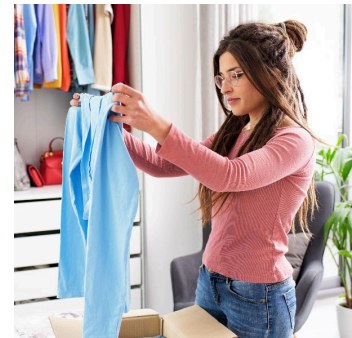
Main growth areas 2024 were parts & accessories and consumer to consumer volumes (suggesting that the decision to abolish fees did help to stimulate private seller activity).

Based on interim results, we expect eBay's UK GMV to decline by 1.5% and net revenues to fall by 7.7% in 2025, the latter mainly due to having a full year with no private seller fees revenues.

Vinted spreads its wings

Vinted will surpass €10 billion (£7.9 billion) in global revenues during 2025, 40% higher than 2024. In the UK, its GMV is estimated to have been worth around £1.6 billion and will grow to over £2.2 billion in 2025, making it the second largest market for Vinted after France. This strong growth reflects its expansion beyond fashion into electronics, books, and toys, positioning itself as a one-stop shop for all things pre-loved.

The UK is also the second-largest market for Etsy, behind the US. The vast majority (96% and growing) of its sales come from the core Etsy marketplace, which concentrates on selling unique, handmade and vintage goods for independent sellers. Peer-to-peer platform Depop has not thrived since Etsy acquired it in 2021 with sales less than half their level in 2019 and contracting by around one third each year. It has been totally overshadowed by Vinted and would seem to have little realistic prospect of challenging its larger rival in the long-term.





ASOS and Debenhams/Boohoo pivot towards marketplace models

ASOS is currently integrating its ASOS Marketplace, featuring over 900 boutiques, directly into ASOS.com. This hybrid fulfilment model ensures a consistent delivery and user experience, highlighting curated offerings like vintage boutiques alongside mainline brands.

Debenhams has adopted a marketplace-led department store model, scaling its range through vetted third-party sellers using a drop-ship approach. The brand leverages its department-store heritage to emphasise curation across fashion, beauty and home categories. This strategy has revitalised the platform's profitability, showcasing how curated breadth, rather than indiscriminate scale, can drive commercial success for a legacy retail brand.

Source: ASOS

Retailer-run marketplaces – different approaches to curation

Tesco's marketplace launch in June 2024 shows how quickly a trusted UK brand can gain traction by leveraging its scale, loyalty programme, and a curated offer. At launch, it was carefully curated, featuring a vetted group of UK sellers and around 10,000 non-food items, all marked with a Marketplace badge. The initial focus on tighter assortment and high-quality standards was a deliberate strategy to avoid overwhelming customers with excessive choices. However, the assortment has since grown to over 600,000 products.

Tesco's marketplace is not just about assortment expansion – it's a direct response to Amazon's dominance and changing consumer expectations for 'one-stop' convenience. By using marketplace data to identify and fill gaps in its offer, Tesco can keep more spend within its ecosystem and reduce customer leakage to rivals.

The seamless integration of Clubcard points on marketplace purchases is also a key differentiator, encouraging existing grocery shoppers to trial the new platform and deepening loyalty within Tesco's ecosystem.

B&Q pilots click and collect for marketplace items

B&Q ensures quality by working with verified sellers and using tighter standards. Third-party items are integrated into the checkout, and customers can return them to any of B&Q's 300 stores.

A pilot program for Click and Collect on marketplace items adds more flexibility. These measures maintain a broad yet controlled product range, preventing shoppers from having to sift through low-quality listings. Since its launch in March 2022, B&Q's Marketplace has seen strong growth reaching 45% of B&Q's ecommerce sales in Q1 2025/26. B&Q's ecommerce sales increased by 17% year-on-year across 2024/25 representing 15% of B&Q's total sales.

Superdrug uses a Mirakl marketplace solution for its own platform, treating marketplace listings organically in site search. It initially doubled its SKUs by on-boarding 300 curated brands, later expanding into fashion while maintaining a focus on trend-right and indie brands. This editorial approach, combined with planned store and app integration, aims to broaden the product range without causing decision fatigue for its core beauty shoppers.

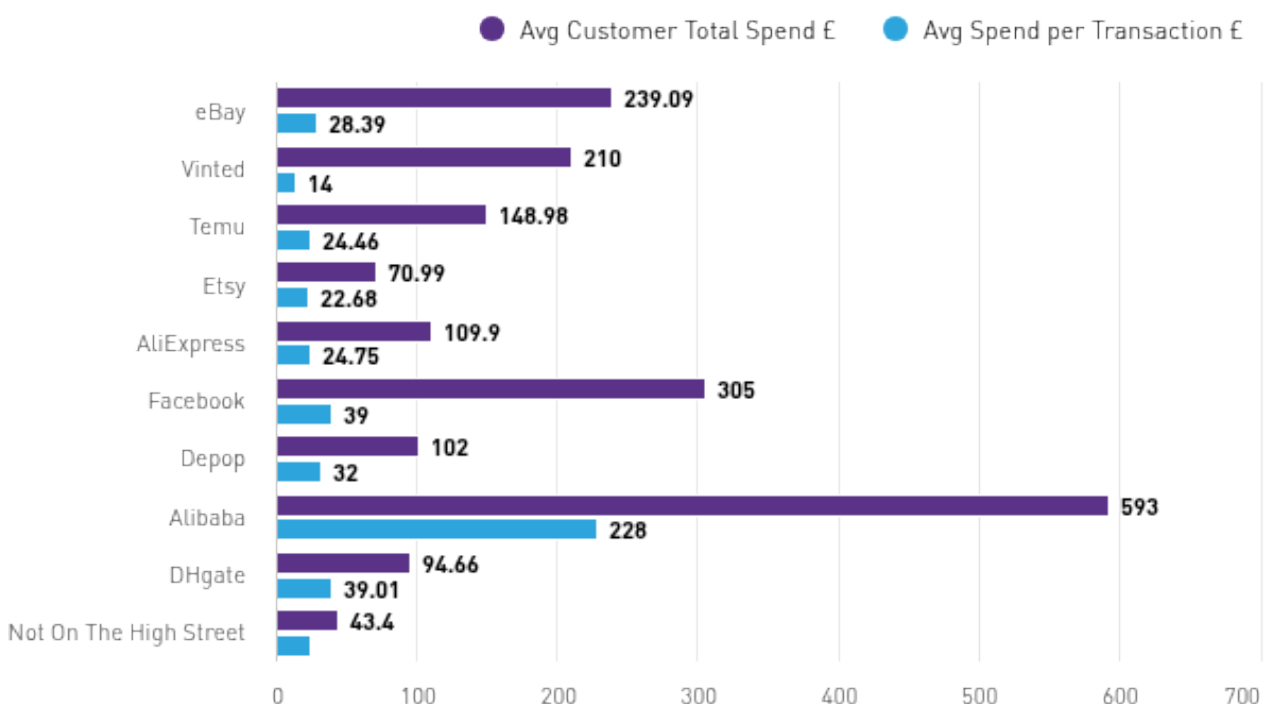
Vinted has the highest customer frequency

SpendMapper data reveals Vinted has the lowest average spend per transaction of the top ten online marketplace and peer-to-peer platforms ranked by total customer spend but still has a good average customer total spend at £210 per year.

This reflects the high average number of transactions (15) of its customers per year. In contrast, rival Depop only has an average of just over three transactions per customer per year. Other brands with high transaction numbers include eBay and Facebook, each with eight.

Alibaba has the highest average customer total spend but its customers in the UK only order from it an average of 2.5 times a year. Facebook's high average total spend reflects a greater focus on cars, bicycles and furniture, which tend to have a higher than average selling price.

UK: top 10 marketplaces and peer-to-peer platforms by total customer spend, average customer spend and average spend per transaction, November 2025



Source: Snoop SpendMapper/Mintel, November 2025

INNOVATION AND MARKETING

Launch activity and innovation

AI tools and personalisation come to the fore

Across leading marketplaces, AI and machine learning have become core to personalising the customer experience. Amazon's 2024 expansion of its Virtual Try-On for fashion with AI-driven size recommendations has been so effective in terms of customer satisfaction that it retired its try-at-home programme by early 2025. In August 2025, Amazon also introduced an AI assistant called Rufus to answer customer queries in natural language and used AI during Prime Day 2025 to tailor deal suggestions (including via Alexa voice shopping).

Like Amazon, [eBay](#) has been piloting a conversational AI shopping assistant (tested in the US mid-2025) to guide buyers to listings with a chat interface. On the site's homepage and emails, eBay's algorithms now dynamically highlight 'Picked for You' deals and trending items tuned to each user's interests.

[Etsy](#) improved its search engine to deliver more tailored results and rolled out a Gift Mode in late 2024 that uses machine learning to suggest gift ideas based on a recipient's tastes (eg suggesting wine-themed handmade items if they've been browsing wine racks).

Depop launched an Outfits collage tool in early 2025 that, while not AI, allows users to creatively personalise their shopping by assembling looks from listed items – driving engagement through customisation.



Sustainability continues to drive demand for resale

UK online marketplaces made significant strides in sustainability and circularity during 2025, [directly fuelling the growth of resale](#).

Amazon integrated used and refurbished products directly into its main listings, while its Climate Pledge Friendly scheme expanded, making it easier for customers to find eco-certified products. Also, its packaging initiatives reduced single-use plastics and promoted recyclable mailers.

eBay launched its first Pre-Loved Fashion Week in London and expanded its partnership with ITV's Love Island. It also partnered with Marks & Spencer to launch a dedicated resale shop. eBay's Imperfects outlet and Certified Refurbished programmes further widened the array of value options, while new features like the Resell on eBay button in digital product passports will make it seamless to give products a second life.

Etsy joined a consortium to pilot new emissions tracking for circular shopping and Depop co-developed a method to quantify how resale displaces new purchases – research published in August 2025 showed [68% of UK Depop buys replace potential new item purchases](#).

Source: eBay

Advances in seller tools look to boost seller numbers

In 2025, UK marketplaces significantly upgraded their seller tools. Amazon introduced an [AI Seller Assistant](#) to automate inventory, pricing and advertising, while its [Opportunity Explorer](#) identified unmet consumer demand. The platform also streamlined FBA logistics and expanded its lending partnerships to support business growth.

eBay launched its [Magical Listing AI](#), which generates listings from a single photo. New bulk listing tools, an Inventory Mapping API and enhanced Seller Hub analytics helped sellers scale operations and track profitability. An AI Messaging Assistant was also added to improve buyer communication.

Vinted introduced [Vinted Pro for business sellers](#), offering bulk uploads and analytics with no commission fees. The platform focused on creating a frictionless experience with AI-assisted listings and printer-free shipping options.

Etsy and Depop also enhanced their tools. Etsy provided real-time listing quality feedback and a Search Visibility Dashboard. [Depop](#) rolled out AI-generated descriptions and a PhotoRoom integration to speed up the listing process for its sellers.

Advertising and marketing

eBay urges shoppers to think of the possibilities of selling for free

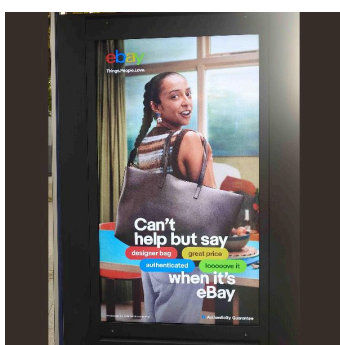
With **46% of consumers** agreeing that an improvement in their financial situation would make them less likely to sell/start selling on a marketplace, eBay has sought to attract new sellers and encourage existing sellers to list more items by highlighting its abolition of selling fees for private sellers.

As consumers' financial situations gradually improve, the imperative to sell items to generate extra cash becomes less important.

Dropping selling fees is seen as a way of maintaining or increasing the base of people selling on eBay, which is crucial to maintain the attractiveness of marketplaces and generating sales revenues.

YouTube seeks to encourage shoppers to think of the possibilities now selling is free

[View Original Post](#)



eBay works to reassure by expanding authenticity guarantees

In 2025, eBay sought to reassure consumers concerned about the authenticity of goods sold on marketplaces (particularly with luxury goods) by promoting its Authenticity Guarantee.

During the year, eBay expanded its Authenticity Guarantee programme to cover 70 luxury and premium brands in clothing, shoes and accessories, building upon its existing guarantees in the trainers/sneakers, watches, handbags and fine jewellery segments. This made the UK eBay's first country market to deliver a comprehensive luxury goods authentication scheme.

Source: Nielsen Creatives

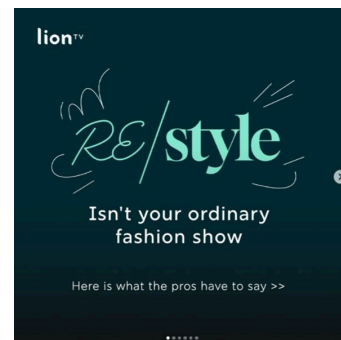
Vinted sponsors RE/style TV show

Vinted has launched RE/style, a new TV series that showcases recycled design as the future of fashion.

The six-part series on Prime Video in October 2025 will feature eight emerging fashion designers – from Europe and the UK – competing to create capsule collections and catwalk-ready looks exclusively from second-hand items. The winning collection will be showcased at London Fashion Week and sold exclusively on Oxfam's Vinted page.

This is the first time Vinted is using long-form branded content and follows eBay's partnership with Love Island.

Source: [Instagram/liontelevision](#)



Vinted Re/style TV show

Vinted's 'New Eras Again' campaign

Vinted

[View Original Post](#)

This campaign from September 2025 positions second-hand shopping as an essential part of life's transitions, from moving to a new home to exploring fresh hobbies.

Highlighting Vinted's expansion into categories like electronics, books and homeware, the campaign blends emotional storytelling with practical benefits.

It emphasises Vinted's role as a lifestyle enabler, going beyond a simple transactional platform to become a trusted partner in life's journey.

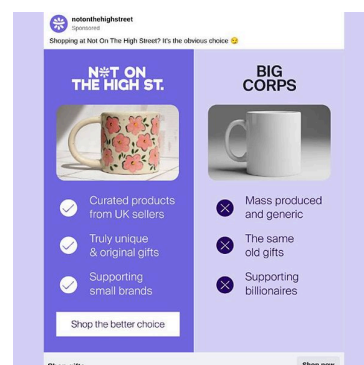
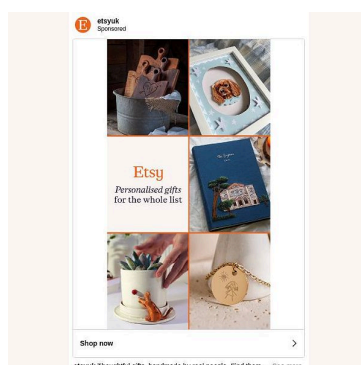
Etsy and NOTHS look to distance themselves from other marketplaces

Both Etsy and Not on the High Street (NOTHS) seek to use their advertising to clearly differentiate themselves from other marketplaces focusing on price and breadth of choice.

Etsy seeks to focus on the option for buyers to choose from a selection of personalised gifts, with something to suit all tastes.

Meanwhile, NOTHS highlights its curated offer, that its products are unique and its support for independent sellers.

Source: Nielsen Creatives



APPENDIX

Consumer Data

Change in shopper demographics at leading retailer-operated marketplaces

UK: marketplace shopping at key retailers, by demographics, percentage point change 2024-25

	Amazon	B&Q	Superdrug	ASOS	Tesco
All	1	2	4	3	5
Generation					
Generation Z (28 and under)	3	3	6	4	9
Younger Millennials (29-35)	-1	2	3	1	5
Older Millennials (36-44)	-1	3	1	-2	4
Generation X (45-60)	0	2	4	3	4
Baby Boomers (61-79)	-1	1	2	1	2
Gender and age					
Male 16-24	7	-1	7	-2	13
Male 25-44	1	4	3	2	10
Male 45-64	1	4	4	4	7
Male 65+	1	-1	1	0	1
Female 16-24	4	8	3	7	-2
Female 25-44	-3	3	6	4	6
Female 45-64	1	1	3	3	2
Female 65+	-8	2	1	0	0
Household income					
Under £15,500	-3	-2	1	0	2
£15,500 - £24,999	2	3	5	2	3
£25,000 - £49,999	-1	3	5	3	7
£50,000 - £74,999	-3	9	6	4	10
£75,000 or over	3	-10	-6	-7	-3

Demographics of those that said they had bought products online from a marketplace seller at each retailer

Base: 1,931 internet users aged 16+ who shop online (2024), 1,939 internet users aged 16+ who shop online (2025)

Source: Mintel, [September 2024](#), [October 2025](#)

Market definition

This Report explores online marketplaces and peer-to-peer sites. For the purpose of this Report, Mintel has defined these two types of operations as:

Marketplaces: marketplaces refers to either an entire B2C website, or an aspect of a website, which typically allows any – usually subject to checks – businesses and individual sellers, often referred to as 'third-party sellers', to use that website to sell goods to consumers. Products sold on marketplace are predominantly done at a fixed price. The marketplace operator will then typically receive a fee or portion of the sale for products sold through the site. Some marketplaces also involve end-to-end handling of goods, from warehousing to delivery, either as a requirement of using the platform or as an additional service with added cost for sellers (eg Fulfilled by Amazon).

Peer-to-peer: refers to any website, or aspect of a website, that facilitates individual sellers to sell to other individuals. Goods sold through such sites are often, but not exclusively, second-hand and many allow negotiation on price between seller and buyer. In most instances, the seller retains all responsibility for communication and distribution to buyers.

The definitions above are broad, and a number of businesses profiled in this Report operate across both definitions (such as eBay). There may be overlap in certain business models within this categorisation. 'Closed marketplaces' or 'platforms', such as Next Total Platform, are not included in the core definition, as access to these platforms is not universal and in most instances subject to B2B contracts to list on these sites.

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Market Size methodology

We have used a ground-up market size based on published data from the leading online-only operators and Mintel's own estimates. This market size is a 'GTV' market size excluding VAT, meaning it represents total sales through such sites, rather than the net revenue generated by operators/platforms, as we feel this gives the best representation of the scale of demand and impact of such sites on the wider retail sector.

Advertising and marketing

UK: total above-the-line, online display and direct mail advertising by online marketplace operators, ranked by top 10 advertisers in 2024, 2021-25*

	2021 £000	2022 £000	2023 £000	2024 £000	2025* £000
Whaleco UK Ltd (Temu)	-	-	198,178	140,498	21,552
eBay Inc	66,229	61,280	52,954	45,747	56,202
Vinted Ltd	39,603	35,136	22,916	26,725	27,341
Etsy Inc	7,698	29,533	32,175	20,725	4,541
Alibaba Group (China)	707	13,676	9,122	13,307	8,986
Notonthehighstreet Enterprises Ltd	2,665	12,210	11,874	8,355	8,714
Gumtree Com Ltd	2,811	1,299	2,563	2,187	3,925
Depop Ltd	1,698	429	768	1,107	0
Wish.com	1,120	3,659	1,810	853	507
Vestiaire Collective	205	74	15	34	26
Others	6,786	2,845	49	16	45
Grand Total	129,523	160,140	332,425	259,556	131,841

* 1 January to 31 September

Source: Nielsen Ad Intel/Mintel

Social media is the leading advertising channel for online marketplaces

UK: proportional distribution of above-the-line, online display and direct mail advertising by online marketplace operators, by media type, 2021-25*

	2021 %	2022 %	2023 %	2024 %	2025 %
Social	7	24	56	51	49
Digital	35	40	29	29	25
Tv	47	28	11	13	20
Outdoor	5	4	3	3	1
Radio	5	4	1	3	4
Cinema	0	0	0	0	1
Press	1	0	0	0	0
Door Drops	0	0	0	0	0
Grand Total	100	100	100	100	100

* 1 January to 31 September

Source: Nielsen Ad Intel/Mintel

The consumer

Consumer research questions

Frequency of shopping online (including groceries) 'How frequently do you typically shop online (including online grocery shopping)?'

Shopping at selected retailers online, directly or from a marketplace seller 'Have you bought products online from any of the following retailers in the last 12 months? Please select all that apply.'

Other marketplaces used to shop online 'And which other marketplaces have you bought products from online in the last 12 months? Please select all that apply.'

Marketplaces used to sell online in the last 12 months 'Which of the following marketplaces have you used to sell products online in the last 12 months? Please select all that apply'

Frequency of online shopping at marketplaces in the last 12 months 'In the last 12 months, have you bought products online from marketplaces more, about the same, or less frequently than you did 12 months ago?'

Attitudes to second-hand shopping at online marketplaces 'Do you agree or disagree with the following statements?'

Attitudes related to shopping at online marketplaces 'Do the following statements about online marketplaces apply to you?'

Consumer research methodology

Mintel commissioned consumer research* for this Report to assess usage of online marketplaces and peer-to-peer platforms and related behaviours and attitudes. Research was carried out by Kantar Profiles among 2,000 internet users aged 16+ in October 2025. Detailed demographics are given in the [Databook](#).

* for further details, see the [research methodology](#)

UK generation groups

Generation Alpha	Born 2013-present.
Generation Z	Born 1997-2012. In 2025, members of Generation Z are aged up to 28.
Millennials	Born 1981-96. In 2025, Millennials are aged 29-44.
Younger Millennials	Born 1990-96. In 2025, Younger Millennials are aged 29-35.
Older Millennials	Born 1981-89. In 2025, Older Millennials are aged 36-44.
Generation X	Born 1965-80. In 2025, members of Generation X are aged 45-60.
Baby Boomers	Born 1946-64. In 2025, Baby Boomers are aged 61-79.
Swing Generation/World War II	Born 1945 or before. In 2025, Swing Generation/World War II members are aged 80 or older.

Other data source methodologies

Nielsen Ad Intel coverage

Nielsen Ad Intel tracks advertising via the following channels: television, radio, press, internet display advertising, outdoor, radio, cinema, direct mail, door drops and social media. Social media advertising tracked includes image and video ads, video polls, carousel and slideshow ads, instant experience, lead and dynamic ads where available on Facebook, Instagram, X (formerly Twitter) and TikTok. Spend on sponsorship and search are not currently measured by NAI. For most channels covered, NAI does not measure expenditure directly, but estimates it by monitoring usage and applying average measures of expenditure.

Abbreviations and terms

AI	Artificial Intelligence
ATL	Above-the-line
B2B	Business to Business
CMA	Competition and Markets Authority
DIY	Do It Yourself
D2C	Direct-to-Consumer
FBA	Fulfilled by Amazon
GDP	Gross Domestic Product
GMV	Gross merchandise value/volume
HMRC	His Majesty's Revenue and Customs
NAI	National Audit Office
NFC	Near-field communication
NOTHS	Not on the High Street
ONS	Office for National Statistics
P2P	Peer-to-peer
SMB	Small and Medium-sized Businesses
USP	Unique selling proposition
VAT	Value Added Tax



Meet the expert

Natalie Macmillan

Senior Retail Analyst

Natalie is a senior analyst with over 25 years' experience researching and writing reports for Mintel's retail team. She has a BSc in Linguistic and International Studies from the University of Surrey and has previously written about the French market.

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