

Mastering the Marketplace in Retail and eCommerce

Leaders Share the Strengths and Opportunities of Their Marketplace Strategies



Foreword from the Producers

“How will our marketplace strategy change in 2026?” If you’re asking yourself this question, you’re in the right place. This research report from eTail Insights explores how successful brands are navigating multi-platform selling, including building competitive advantages across digital marketplaces.

Based on survey responses and conversations with senior retail and eCommerce leaders, our report provides insights into marketplace maturity, what’s working in real-world strategies, and where the most significant gaps and opportunities lie. Whether you’re managing inventory coordination across multiple channels, wrestling with data integration challenges, optimizing customer relationships across platforms, or struggling with profitability margins, these practical insights can help.

Our goal at eTail is simple: to equip you with the insights and connections you need to step up, level up, build up, and keep up as our industry evolves. We’ll continue these conversations with you at eTail Palm Springs in February 2026, where we’ll bring together retail leaders to share strategies, solve challenges, and explore the future of digital commerce together. We hope to see you there.



Elizabeth Robillard
Senior Portfolio Director
eTail



Zainab Hayat
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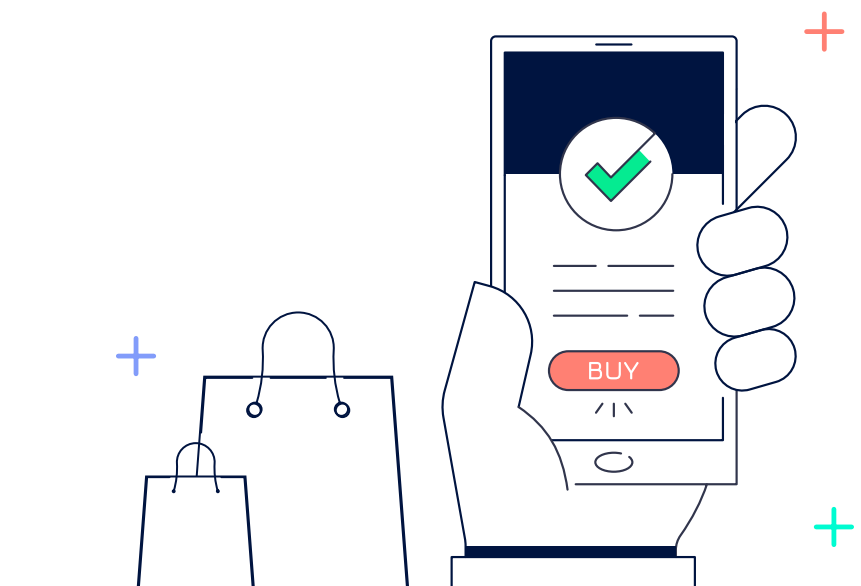


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Executive Summary

As digital commerce evolves, the ability to navigate multi-platform selling environments like marketplaces has become a key to success.

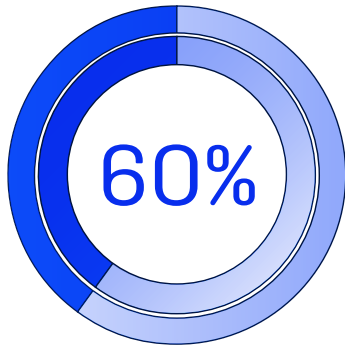
Organizations that master marketplace dynamics like inventory coordination, data integration, customer engagement, and brand storytelling can position themselves to capture incremental revenue streams. This will allow them to expand their market reach without significant infrastructure investments.

The results of the study suggest retailers must develop sophisticated marketplace capabilities that balance platform-specific optimization with seamless omnichannel integration. Using the right combination of technology and strategy, they can maintain profitable unit economics while supporting authentic customer relationships.

About the Respondents

eTail Insights surveyed 100 retail and eCommerce leaders across apparel, electronics, department stores, and other major sectors to generate the results featured in this report.

Annual Revenue



**\$500+ MILLION
ANNUAL REVENUE**

Roles:

- 38% Marketing
- 24% Customer Experience
- 22% eCommerce
- 16% D2C

Seniority:

- 25% C-suite
- 25% Vice President
- 24% Department Head
- 26% Director

Key Insights

The two leading marketplace challenges are:

- Coordinating inventory across platforms (40%)
- Integrating marketplace data (33%)

67%

are developing strategies to address marketplace challenges.

78%

rate their ability to increase product visibility on marketplaces "somewhat high."

The top three marketplace investment priorities for the next 12 months are:

- Customer service and review management systems (51%)
- Marketplace advertising and content expansion (46%)
- Competitive and dynamic pricing tools (41%)

96%

sell on Amazon and 77% sell on Walmart.com.

85%

rate their marketplace strategies at least somewhat effective for revenue.

100%

say their product listing optimization capabilities are at least "good."

33%

rate their customer review management capabilities as "fair" or worse.

81%

say marketplace sales will become more important for their overall strategies.



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Most Current Marketplace Strategies Are Driving Revenue Growth

Marketplaces have become essential sales channels for retail organizations, requiring leaders to make critical decisions about platform selection, resource allocation, and brand representation.



Balancing marketplace presence with direct-to-consumer operations now shapes how brands grow and connect with customers across digital storefronts.

Nearly all the organizations in the study sell through Amazon (96%), while most sell through Walmart.com (77%). Other channels, such as eBay, Target.com, and social media shops, are secondary. Although Amazon has long dominated the eCommerce space, these results suggest that Walmart.com is becoming a contender from a marketplace standpoint.

Through which of the following marketplaces does your company currently sell?



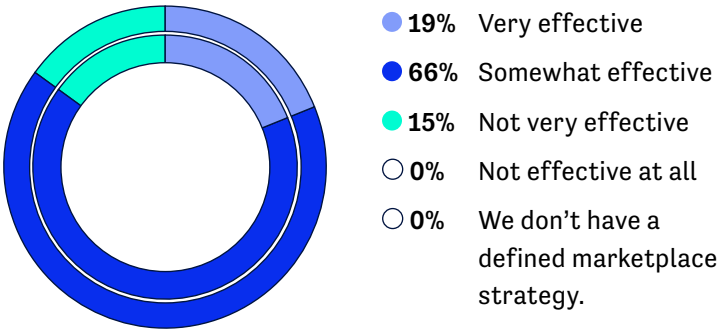
Most respondents rate their marketplace strategy as somewhat (66%) or very effective (19%) for revenue growth. Retailers likely view marketplace commerce as a core part of the business, so most have at least a moderate level of sophistication in their strategies.

Among only these companies, the top two most impactful factors to their success have been strong brand presence and storytelling (38%) and effective advertising and sponsored content (36%).

About one-third (33%) say cross-platform integration and consistency are one of the most impactful factors.

As expected, successful advertising drives results. However, the respondents' emphasis on brand storytelling suggests that marketplace success requires more than just paid visibility; it also demands a level of authenticity and added value that cannot be delivered through discounted products or sheer visibility.

How would you rate the overall effectiveness of your marketplace strategy in driving revenue growth over the past 12 months?



Since you indicated your marketplace strategy has been effective, what have been the top two (2) most impactful factors in your marketplace success?



Brands that can tell a compelling story, align with their customers' values, or offer customers a meaningful experience may succeed more than others.

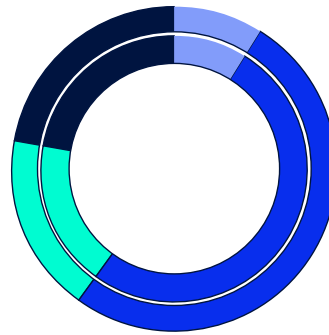
However, brands must balance their marketplace sales with their direct-to-consumer (D2C) strategies to connect with customers, as each plays a distinct role in the process.

While marketplaces offer brand reach, these channels tend to have uniform merchandising requirements that make differentiation challenging. Meanwhile, D2C channels offer more brand control, more chances to build lasting connections with customers, and the opportunity to create a more unique customer experience.

About half of the respondents (51%) say they use a balanced approach, with roughly equal emphasis on both channels.

Nonetheless, prioritizing either channel may not be necessary with a fully integrated omnichannel approach to sales, which 22% of the respondents use. When all touchpoints are connected and customer journeys are seamless, brands draw strength from each channel without internal competition for sales or acquisitions.

What is your company's current approach to balancing direct-to-consumer (D2C) sales versus marketplace sales?



- 9% We are primarily focused on D2C with limited marketplace presence.
- 51% We have a balanced approach with roughly equal emphasis on both channels.
- 18% We have a marketplace-heavy strategy with D2C as a secondary focus.
- 22% We have a fully-integrated omnichannel approach with no channel prioritization.
- 0% We are still determining our optimal channel mix.

In terms of marketplace capabilities, respondents rate their performance as either “good” or “excellent” in data analytics and performance tracking (81%), inventory management across channels (77%), and product listing optimization (100%) compared to others.

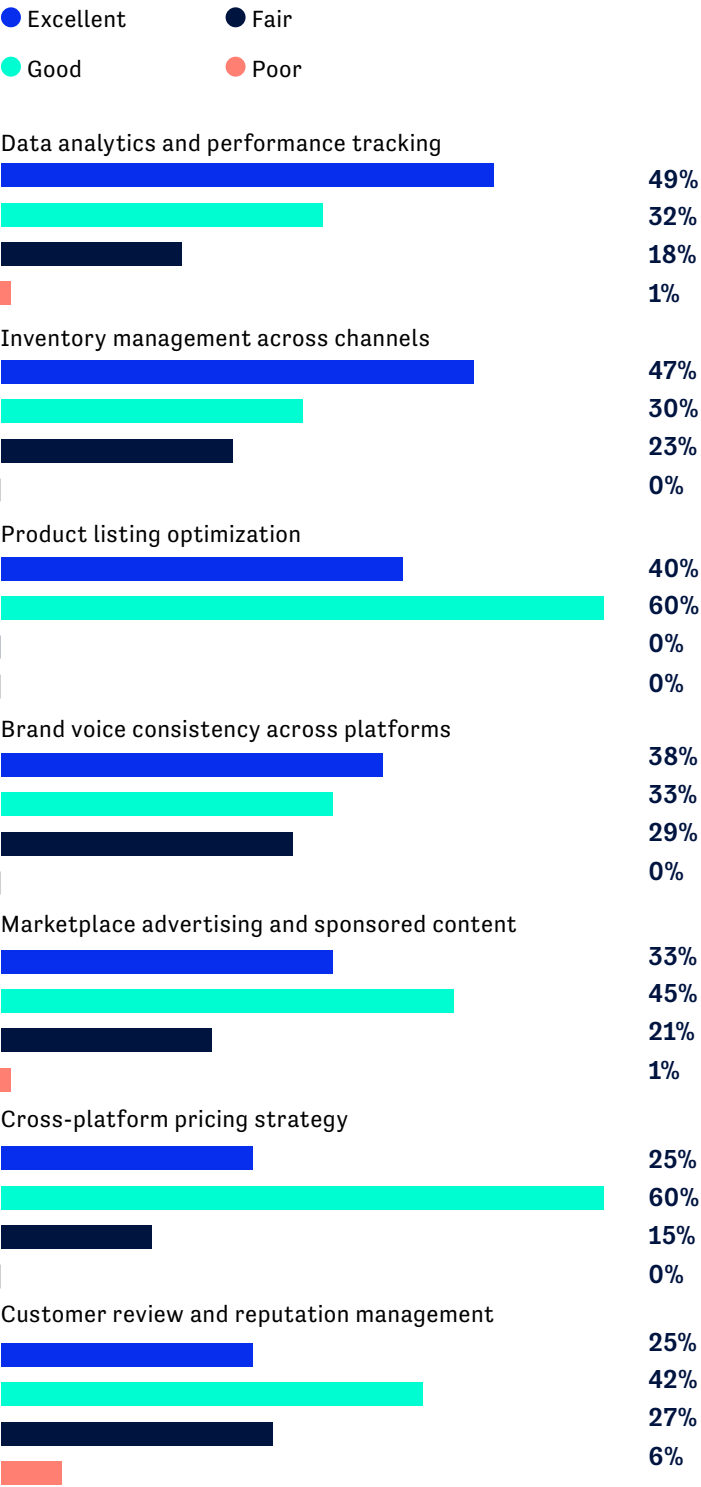
A significant 85% of the respondents also consider their cross-platform pricing strategies either good (60%) or excellent (25%).

The respondents’ universal confidence in listing optimization stands out sharply against lower ratings for capabilities that a significant number of respondents deemed “fair” or “poor.” These include customer review and reputation management (27% fair and 6% poor), brand voice consistency across platforms (29% fair), and inventory management and analytics (23% fair).

This pattern suggests organizations are perfecting their storefronts and pricing while under-investing in customer outreach, brand strategy, logistics, and operations.

Some of these issues could be solved with a holistic commerce solution that supports every aspect of the brand’s marketplace strategy. Instead of only prioritizing listings, brands must be able to strengthen brand communication, operational flexibility, and customer trust through the same tool.

From your perspective, how well does your organization perform the following marketplace capabilities?



Practitioner Perspectives: Treat D2C and Marketplaces as Distinct Sales Channels

Practitioners at both eTail Boston and eTail Palm Springs 2025 suggest treating D2C and marketplaces as distinct sales channels that must each prove their financial viability. For most brands, marketplaces began as part of a go-to-market strategy, but they have since evolved into rigorous channels requiring their own profit and loss analyses.

Practitioners report working closely with partners during pricing pressures. They've negotiated shared strategies in which both parties absorb portions of cost increases rather than passing full burdens to consumers.

Customer acquisition through D2C channels is becoming more expensive, but revenue generated through marketplaces comes with additional costs. Therefore, successful leaders must identify the purpose of each channel (marketplaces for acquisition, D2C for customer lifetime value).

"The brands that are winning on Amazon are those that are doubling down on volume-driving items that have strong organic traction and are a part of Amazon's [price-to-value] flywheel concept. We obsess every single day over 25 styles that we have on Amazon, tracking our search rankings and our conversion rates so we ensure they are going up."

Stuart Hogue, Senior Vice President, US Consumer, Lands' End, Panel Discussion: "Finding the Sweet Spot: Juggling D2C, Wholesale, and Marketplaces for Maximum Impact," eTail Boston 2025



Organizations Are Still Developing Plans to Address Key Marketplace Challenges

Digital marketplaces are evolving faster than ever, bringing a new set of operational and strategic hurdles for brands. Retail leaders must now address complex issues behind the scenes while keeping their offerings visible and profitable on multiple platforms.



The top two challenges the respondents face when selling on major marketplaces like Amazon and Walmart.com are coordinating inventory across platforms (40%) and integrating marketplace data with internal systems (33%). These hurdles reveal that organizations struggle most with backend logistics and data usability rather than front-end marketing.

Coordinating inventory can be a significant challenge when some marketplaces make promises to customers like next-day delivery, regardless of the customer's location. Brands may struggle to allocate products to the right physical plants to fulfill such requests.

Which of the following are the top two [2] biggest challenges your organization faces when selling on major marketplaces?

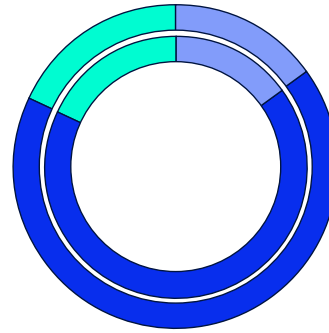


Marketplace data, while plentiful, can be difficult to integrate due to its complexity and lack of standardization, as well as the speed at which it is generated. Retailer and brand systems may not be able to synchronize the data fast enough to ensure their internal data matches that of the marketplace.

When data can't be synchronized, it can produce errors in the organization's inventory, pricing, orders, and customer data.

Addressing these challenges requires mature marketplace strategies and infrastructure. While 67% of respondents are still developing solutions and another 18% have only just begun, a mere 15% report having comprehensive strategies in place. This suggests that established brands are in the early stages of solving fundamental issues in marketplace operations.

How mature is your company's strategy for addressing the challenges you selected in the previous question?



- 15% We have a comprehensive strategy already in execution.
- 67% We're developing a strategy, but haven't implemented it yet.
- 18% We've identified our objectives, but haven't begun developing a strategy.
- 0% We're still evaluating these challenges.
- 0% Addressing these challenges isn't currently a priority.
- 0% I'm not sure.

"First-party data is gold, but it's becoming more challenging and more costly to obtain. We would love it if Macy's just handed over their list, but they aren't going to do that. That's why it has become so important to properly segment and personalize your lookalikes, so they can efficiently match what's happening in the marketplace."

Kristin Dicunzolo, CEO & President, WearLIVELY, Panel Discussion: "Finding the Sweet Spot: Juggling D2C, Wholesale, and Marketplaces for Maximum Impact," eTail Boston 2025

Product visibility is one of the most significant incentives for selling over marketplaces, but the respondents' view of their success in this area is mixed and generally modest. Most respondents (78%) rate their ability to increase visibility as only somewhat high, with performance varying across different channels. Another 9% report somewhat low visibility with inconsistent results.

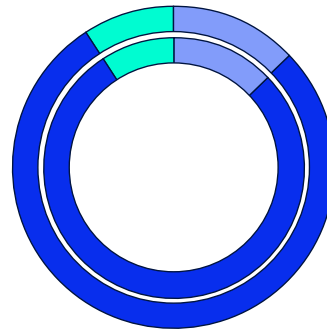
Just 13% have achieved very high visibility across all platforms, indicating that mastering discoverability remains elusive for most.

Marketplaces can deliver significant results in this area thanks to the capabilities they offer brands. However, it's often up to brands themselves to optimize product listings, content, images, video, and interactive elements, as these are what differentiate their products from others on the marketplace. In many cases, products must be optimized to ensure they are more attractive than products that can undercut them with lower prices.

Similarly, the respondents report mixed results on profitability across marketplaces.

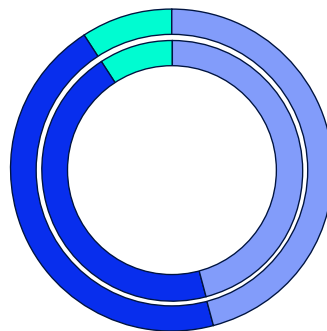
The results show a near-even split between those with strong control and clear visibility into margins (46%) and those maintaining only partial control while struggling with costs due to ads, fees, and logistics (45%). A small but notable 9% admit to limited control due to marketplace costs.

How would you rate your ability to increase your products' visibility across major marketplaces (i.e., share of voice for organic and paid placements)?



- 13% Very high: high visibility across most channels
- 78% Somewhat high: visibility varies by channel
- 9% Somewhat low: visibility is inconsistent
- 0% Low: we often struggle to get products seen

How much control do you have over profitability across marketplaces when factoring in advertising rates, commission fees, storage, and fulfillment costs?



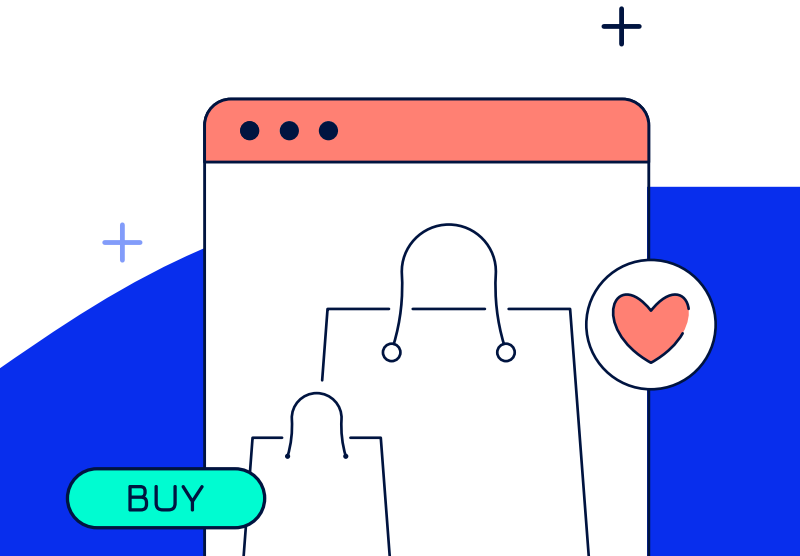
- 46% We have strong control and clear visibility into margins.
- 45% We have partial control but struggle with certain costs (e.g., ads, fees, logistics).
- 9% We have limited control and often sacrifice margin for growth.

This aligns somewhat with findings from the question about respondents' top two challenges. Specifically, 29% say balancing marketplace fees with profitability is a top challenge.

This divide suggests that pricing power and cost management separate the leaders from those still finding their footing.

The ability to maintain strong contribution margins appears to be a critical differentiator for successful marketplace sellers. Brands must factor in not only gross profit but also advertising costs, platform fees, and fulfillment expenses.

Organizations that lack this comprehensive view of their unit economics risk making decisions based on incomplete data, resulting in costly mistakes. For example, they could potentially scale unprofitable channels while missing opportunities to optimize their most lucrative marketplace relationships.



Practitioner Perspectives: Inventory Coordination is Possible Even When Data Integration is Elusive

Practitioners at eTail Boston 2025 agreed that one of their biggest challenges is managing inventory across shared systems. Retailers agree that shared inventory models create agility and provide valuable customer data across channels.

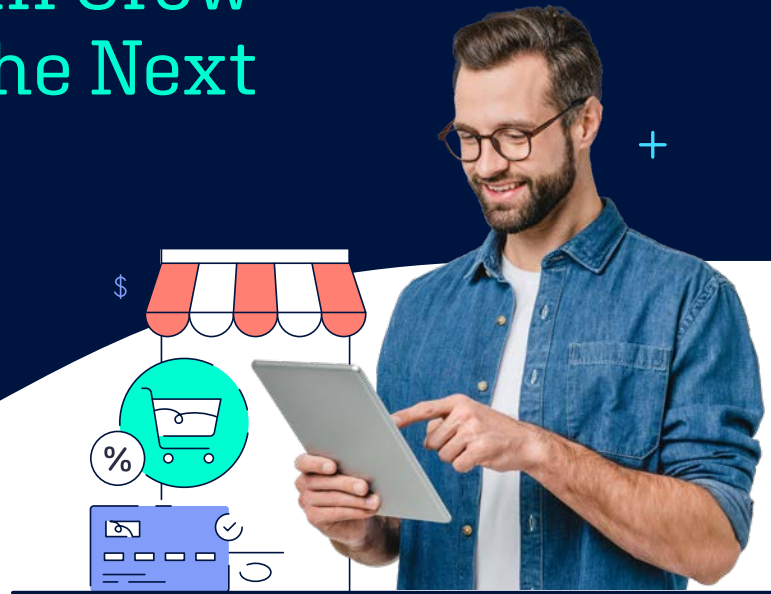
However, using this model requires sophisticated fulfillment tracking capabilities, as this allows retailers to understand where products are shipping from and who the ultimate customer is.

Data fragmentation is a persistent challenge, with leaders acknowledging that first-party data becomes increasingly limited and costly as marketplace presence expands. Marketplace partners rarely share customer lists, forcing brands to develop internal segmentation strategies and lookalike audiences from owned channels to maintain marketing efficiency.

One speaker at eTail Boston 2025 said retailers need “multiple data lenses” to gain true visibility. This means combining fulfillment data, customer service insights, and direct customer polling to build an understanding of cross-channel shopping behaviors.

Marketplace Sales Will Grow in Importance Over the Next 12 Months

Looking toward 2026 and beyond, marketplace sales are expected to become more important for overall strategy.



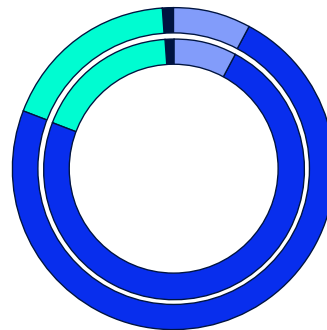
Most of the respondents (73%) anticipate marketplace sales to increase in importance somewhat, while 8% project them to increase significantly.

Only 1% foresee declining importance.

Marketplaces enable brands to rapidly expand their reach to new customer segments without significant infrastructure investments, which makes them a competitive option for start-ups. Additionally, marketplaces deliver powerful network effects and high-traffic environments that drive increased sales opportunities and brand exposure.

They are a strategic channel for tapping into incremental revenue streams as competition intensifies and traditional customer acquisition costs rise. This momentum behind marketplaces reflects the ways retailers are choosing to shift their resources.

Looking toward 2026 and beyond, how do you expect the importance of marketplace sales to change for your organization's overall strategy?



- 8% Become significantly more important
- 73% Become somewhat more important
- 18% Remain at current levels of importance
- 1% Become somewhat less important
- 0% Become significantly less important

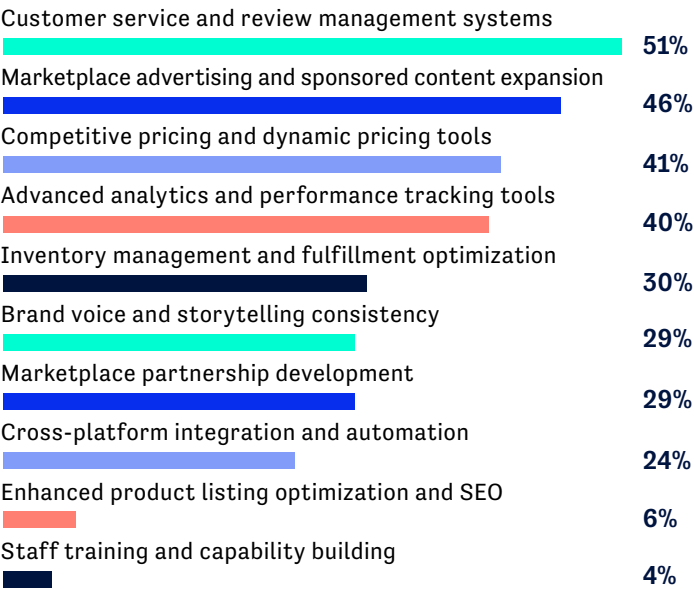
Respondents were asked to identify their top three marketplace investment priorities for the next 12 months among a series of choices. More than half of them (51%) say customer service and review management systems are a top investment. The next two are marketplace advertising and sponsored content expansion (46%) and competitive pricing and dynamic pricing tools (41%).

Almost tied for the third-most important investment are advanced analytics and tracking tools, selected by 40% of the respondents.

What stands out is the primacy of customer service infrastructure over advertising spend. This suggests that many retailers recognize that marketplace success depends first on operational excellence, such as managing reviews and customer interactions. Investments in this area must come before scaling paid promotion efforts.

The emphasis on pricing tools as the third priority reveals an ongoing struggle to maintain margins while meeting marketplace price expectations. Analytics and performance tracking tools can assist in this area, but developing these capabilities may require a new platform for some retailers.

Looking ahead to the next 12 months, what are your top 3 marketplace investment priorities?



Practitioner Perspectives: Drive Revenue with High-Performing SKUs and Knowing Your Customer

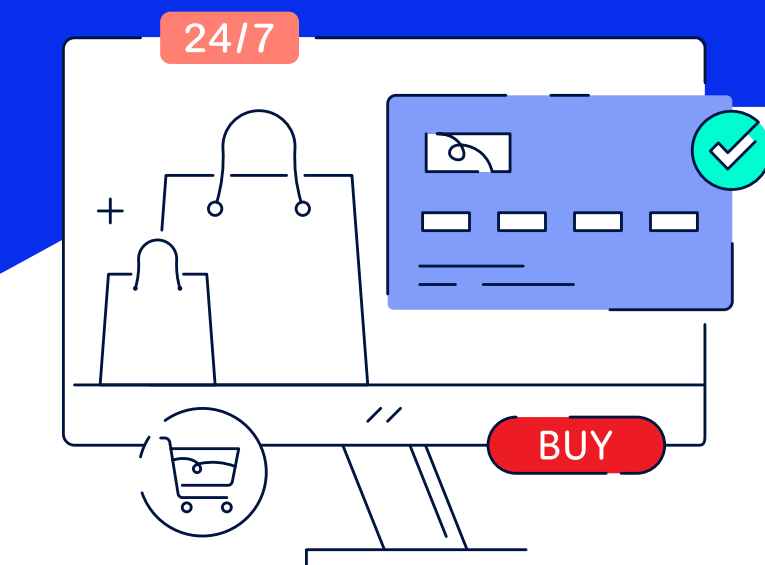
Practitioners tell eTail Insights that they see marketplace expansion as critical for generating revenue and essential to meeting customers where they already shop. The challenge is identifying the strengths and weaknesses of each platform, as well as what best serves the interests of the brand.

Many brand leaders say they tend to focus on selling a handful of high-performing items through marketplaces instead of their entire catalogs. According to one practitioner, the idea is to acquire new customers with limited SKUs, then move those customers to their direct channels to generate high lifetime value.

Understanding varying shopper mindsets across platforms is also key. Amazon shoppers tend to search and convert quickly, while Target boosts brand discovery and drives results in other channels. Understanding these nuances allows brands to use each marketplace accordingly.

“We started with D2C first and then expanded into wholesale retail stores and most recently into marketplaces, including Amazon. Now, we have more insight into a broader marketplace. We’re pairing those customer insights and data points with our product development team to map out and shape our product roadmap.”

Calvin Lammers, fmr. Senior Vice President of Digital & Media, Necessaire Inc., Panel Discussion: “Navigating the Next Phase of the D2C Revolution,” eTail Palm Springs 2025



Leaders Identify Opportunities for Improving Marketplace Performance

Retail and eCommerce leaders have many perspectives on where the greatest opportunities lie in marketplace improvement over the next year. Many of those perspectives align with where they say they plan to invest.



There are three core and noteworthy themes in their responses. These examples reveal where industry leaders plan to focus their attention and how these priorities will change the landscape of digital marketplace sales.

Deepening Customer Relationships

Improving customer retention, trust, and personalized experiences stands out across many responses.

Leaders emphasize that retention is key to driving marketplace growth. One respondent says, “Transforming one-off buyers into loyal, repeat customers is our biggest opportunity.”

Another respondent highlights loyalty as well. They say, “Creating loyalty programs that go beyond transactions, encompassing both online and offline experiences, will help reach deeper engagement.”

This focus suggests a move toward strategies that foster long-term relationships, such as rewards, referrals, and community-driven content. Enhancing post-purchase engagement and communication, as well as introducing more flexible return options, is viewed as critical for building trust and maintaining momentum beyond the initial sale.

Refining Data Integration and Technology

Several leaders see technological integration and data-driven decision-making as crucial. For instance, one participant plans to “bring together marketing, customer support, and sales data,” as this “will create more proactive and helpful experiences” for customers.

Others point to automation and artificial intelligence as value drivers.

“Leveraging AI for search, recommendations, and fraud detection enables us to adapt quickly to market shifts and protect the business,” says a respondent.

Many stress the importance of using analytics to forecast trends and respond to buyer demand before competitors can. This implies that marketplace success depends not only on having data but also on connecting, interpreting, and acting on it swiftly.

Enhancing the Buyer Experience

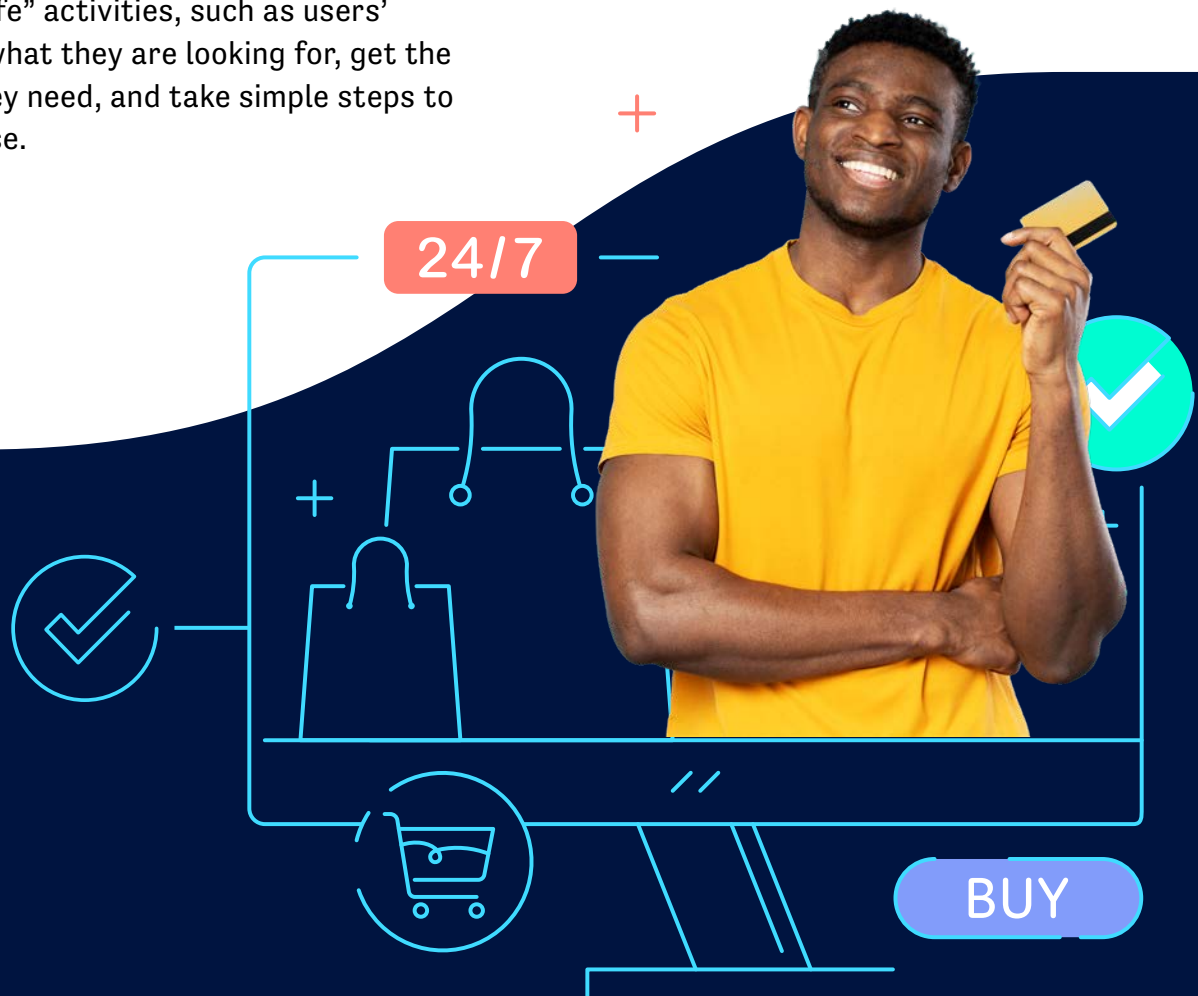
Similar to brands’ desire to deepen customer relationships, many believe their biggest opportunity lies in optimizing the user experience. Although similar, UX concerns generally apply to “quality of life” activities, such as users’ ability to find what they are looking for, get the information they need, and take simple steps to make a purchase.

The respondents see improving site speed, checkout processes, mobile usability, and seamless payment options as immediate opportunities.

“Streamlining our checkout and offering more payment choices will drive better conversion rates,” observes a respondent.

Another leader says, “Simplifying friction points across the customer journey boosts satisfaction and repeat purchases.”

These comments highlight the growing pressure to remove barriers, make discovery and comparison easier, and ensure every aspect of the marketplace is efficient and rewarding.



Conclusion: Navigating Marketplace Maturity

Brands have demonstrated that they have confidence in certain marketplace capabilities, but they are still struggling with underlying weaknesses in others.

For example, while brands demonstrate strong competency in product listing optimization and pricing strategy, they simultaneously acknowledge significant gaps in customer relationship management, operational integration, and brand consistency across platforms. This divergence suggests that many organizations have prioritized the tactical elements of marketplace presence, underinvesting in the strategic infrastructure required for sustainable success.

Marketplace excellence cannot be achieved through fragmented point solutions or isolated optimizations. Instead, retailers must embrace

holistic commerce platforms that unify inventory management, data analytics, customer engagement, and brand storytelling.

Importantly, the respondents' emphasis on customer service infrastructure over advertising spend signals a maturing understanding of how future marketplace strategies should develop. Long-term marketplace success depends less on paid visibility and more on operational excellence, authentic relationships, and the ability to transform one-time buyers into loyal advocates who return for more.

Key Suggestions

Prioritize integrated technology over isolated fixes: Invest in platforms that connect marketplace data with internal systems in real time, ensuring coordinated inventory, unified customer profiles, and full margin visibility across channels.

Build loyalty strategies beyond transactions: Focus on retention programs like post-purchase engagement, flexible returns, and value-driven rewards to turn marketplace shoppers into loyal advocates who value trust and experience.

Establish storytelling frameworks that outshine discounts: Develop compelling narratives and brand experiences that set your marketplace presence apart from competitors who focus on price or paid ads.

Implement full-scale margin management: Gain visibility into all marketplace costs—including ads, fees, and fulfillment—to determine which channels truly drive profits and where investment should go.

About the Author

eTail Insights

eTail Insights, the industry research and digital publishing arm of eTail, delivers cutting-edge data and analysis on trends, challenges, and opportunities in the retail and eCommerce sectors. Through comprehensive research reports, webinars, and thought leadership initiatives, we empower senior-level retail leaders to make informed strategic decisions and stay ahead in the rapidly evolving digital landscape.

Our deep industry intelligence not only informs retail leaders but also connects innovative solution providers with key decision-makers, fostering a dynamic ecosystem that drives the future of digital retail.

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Top global retailers and brands, including Adidas, Best Buy, B&Q, Draper Tools, The Home Depot, and Zalando, trust Rithum to streamline their commerce operations and maximize results. With teams based in the U.S., U.K., Ireland, Spain, and Australia, we partner with clients worldwide to make commerce smarter, faster, and more connected.

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