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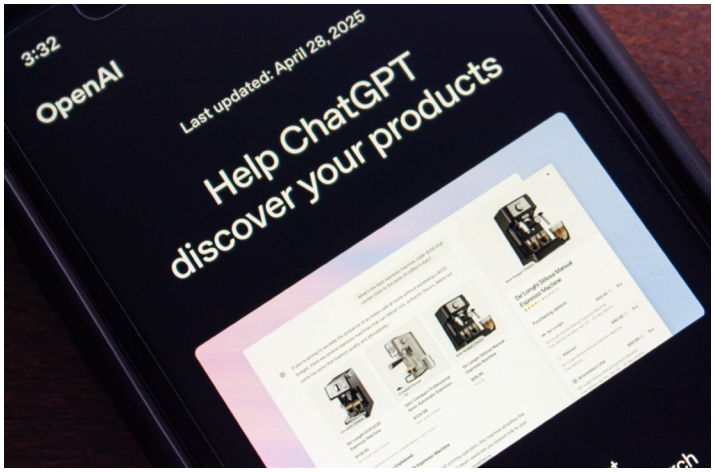
DIGITAL COMMERCE 360 RETAIL

2026 LEADING VENDORS TO THE TOP 1000 RETAILERS

Ranking, data and analysis of the top ecommerce technology providers



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OVERVIEW

For online retailers in 2025, artificial intelligence (AI) is already part of the landscape. Tools reaching across ecommerce technology stacks and facilitating customer experiences — both on and off of merchants websites — are impacting sales. More importantly, consumers are using them.

Survey results released by the consulting firm Deloitte ahead of the 2025 holiday season showed that a third of U.S. consumers planned to use generative AI tools for holiday shopping. For those using it, more than half (56%) expected to use those tools for research. 47% expected to use them for summarizing product reviews. And 33% planned to use them for generating shopping lists.

In this year's Leading Vendors report, Digital Commerce 360 and Bizrate Insights added fresh survey results about online shoppers' comfort levels with AI. Online retailers should be aware of their customers' curiosity, as well as how they are encountering product reviews and recommendations from ChatGPT, Perplexity and other AI platforms.

For now, these AI tools are mostly for discovery and insights. But now that some of these platforms are launching in-experience purchasing, there is a real test playing out ahead of this year's busiest shopping season to see how big of a role agentic commerce — purchasing guided and executed by AI — will play.

OpenAI, Perplexity and Google all have new AI-powered web-browser features ready to test the waters over the holidays, and the results may inform how retailers allocate their technology investments in 2026. **LV**

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THE AI TOOLS CUSTOMERS WANT TO USE

As online retailers enter the 2025 holiday season and look ahead to 2026, a new wave of consumer technology adoption has already arrived on generative artificial intelligence (AI) and agentic AI platforms. Now, merchants must calibrate their strategies to confront what comes next.

Tech companies including Alphabet, Microsoft, OpenAI and Perplexity are out to define the new era of web browser experiences, building in assistance from large language models and — in some cases — AI-powered agents that can browse websites and make decisions or execute transactions on behalf of users.

Meanwhile, platforms such as Salesforce are building AI agents into on-site experiences for discovery and customer service. In its holiday season forecast for 2025, Salesforce went as far as to predict that agentic AI will drive almost one-fifth of U.S. online holiday sales. It sees AI and agents playing significant roles $263 billion in online sales globally and $51 billion in the U.S. alone.

In new survey results from Bizrate Insights and Digital Commerce 360, online shoppers offered a glimpse into how AI has already entered their shopping experiences, as well as which use cases interest them most. While significant skepticism persists, a majority of survey participants appeared ready to put AI tools to work as they shop online.

MOST SHOPPERS ARE ALREADY USING AI TOOLS

Even though generative AI tools such as ChatGPT and Perplexity are not consistently present in consumers' online workflows, they are being leveraged for a variety of tasks that merchants need to understand. As of October, 51.9% survey respondents indicated that they had used AI tools to perform research on products they wanted to buy online.

This behavior has implications for ecommerce sites that range from how product listings appear to how OpenAI's ChatGPT, Anthopic's Claude and Google's Gemini see, understand and compare those listings when responding to users' prompts.

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ECOMMERCE SITES ARE STILL WHERE PURCHASES HAPPEN – FOR NOW

While research was common within AI tools, shoppers still appeared reluctant to make purchases directly through these platforms. Both OpenAI and Google (among other providers) have recently launched protocols to enable payments within LLM-powered experiences. ChatGPT's Instant Checkout has already rolled out for listings from Etsy's online marketplace.

Still, only 28.9% of online shoppers surveyed said they made purchases using links provided to them by ChatGPT, Perplexity, Gemini or a similar AI tool. Importantly, that share of shoppers is still substantial. However, the gap between this use case and those who have used such tools for research shows that in-app experiences with these tools have not yet become one-stop shops for consumers' ecommerce needs.

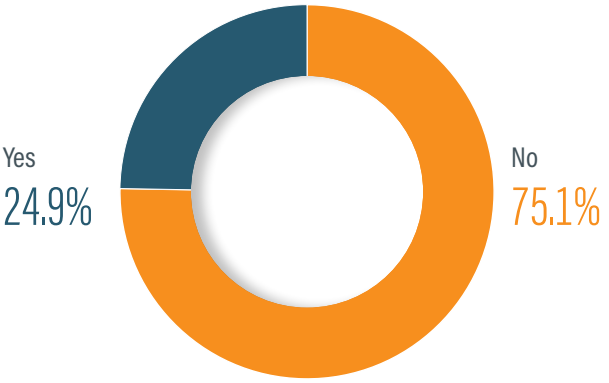
AI-ENABLED FEATURES THAT SHOPPERS USE MOST

For now, three AI-powered features proved to be vastly more familiar to online shoppers than others. Asked which features they had encountered while shopping, survey participants cited personalized product recommendations (39.5%), AI-powered chatbots or virtual assistants (36.7%) and AI-generated product descriptions or reviews (32.9%) about other options.

IN THE PAST MONTH, HAVE YOU USED ARTIFICIAL INTELLIGENCE TOOLS SUCH AS CHATGPT, PERPLEXITY OR GOOGLE'S GEMINI TO RESEARCH PRODUCTS YOU WANT TO BUY ONLINE?

Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

IN THE PAST MONTH, HAVE YOU MADE A PURCHASE DIRECTLY THROUGH A LINK THAT WAS RECOMMENDED TO YOU BY CHATGPT, PERPLEXITY, GEMINI OR A SIMILAR AI TOOL?



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

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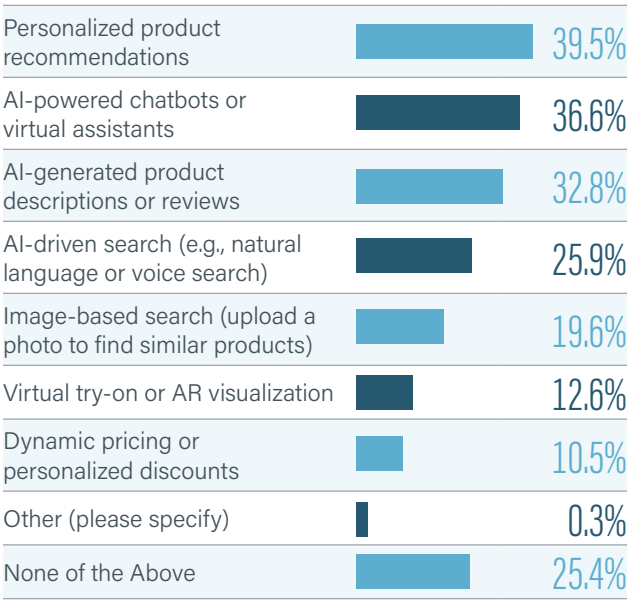
Among those options, shoppers were most likely to have used personalized product recommendations (38.8%) or AI-generated product descriptions or reviews (28.4%).

Meanwhile, more advanced features lagged behind, even as significant shares of respondents acknowledged encountering them. Noteworthy examples included virtual try-on (12.6%), dynamic pricing (10.5%) and image-based search (19.6%). In addition, younger shoppers (especially those aged 18 to 29) showed more awareness than older cohorts with AR and visual tools (18.1% vs. 12.6% overall).

WHICH OF THE FOLLOWING AI-POWERED FEATURES HAVE YOU ENCOUNTERED WHILE SHOPPING ONLINE?

(Select all that apply)



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

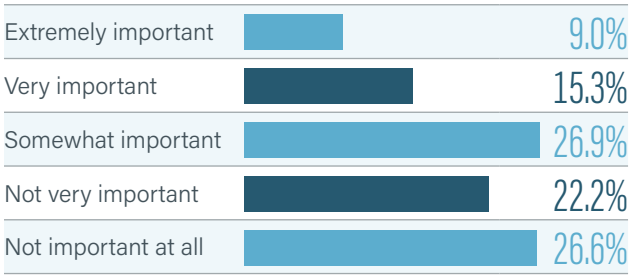
In these cases, it was clear that personalized results are catching shoppers' attention. As technology matures, the survey results demonstrated where retailers should watch to serve emerging habits among various age groups.

HOW INFLUENTIAL IS AI RIGHT NOW IN PURCHASE DECISIONS?

Overall, AI is not yet playing a decisive role in driving conversion. However, survey results showed that it carries weight. Shoppers were split, with a narrow majority (51.2%) saying that AI features were at least somewhat important in their decisions to make purchases.

Only 9.0% of survey participants called AI features extremely important in their purchase decisions. Yet, the fact that most shoppers considered these features to be important demonstrates that these tools should not be ignored.

HOW IMPORTANT ARE AI-POWERED FEATURES IN YOUR DECISION TO PURCHASE FROM A RETAILER?



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

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As for online retailers already deploying AI features on their sites, the results also underscore the importance of clear communication when convincing skeptics of the potential value in using this technology.

Asked which features shoppers valued most, personalized recommendations (22.1%) appeared most often, with virtual try-on and AR visualization (6.7%) the least valued.

WHICH AI FEATURE ADDS THE MOST VALUE TO YOUR SHOPPING EXPERIENCE?

Personalized recommendations	22.1%
AI-driven search	15.9%
AI-generated content (descriptions, reviews)	15.7%
Dynamic pricing / personalized discounts	15.6%
Image-based search	15.6%
AI-powered chatbots	8.4%
Virtual try-on/AR visualization	6.7%

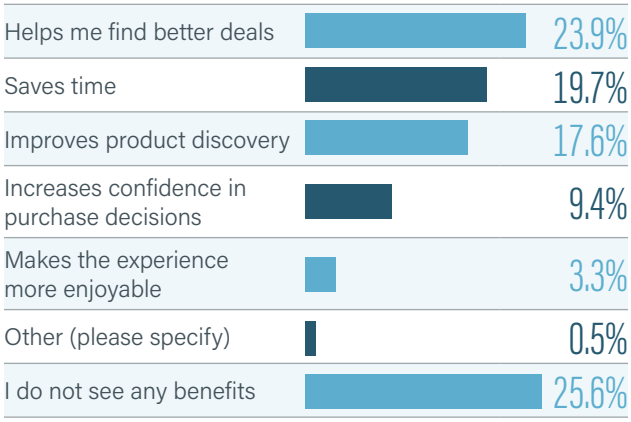
Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

WHY SHOPPERS USE AI TOOLS

Online shoppers' motivations for using AI tools were relatively easy to understand. The common perspectives came down to saving time or money.

At the top of the list was finding better deals (23.9%), followed by saving time (19.7%) and improving product discovery (17.6%). However, 25.6% of participants indicated that they did not see any benefits being provided from AI features.

WHAT IS THE PRIMARY BENEFIT YOU GET FROM AI FEATURES WHEN SHOPPING ONLINE?



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

BARRIERS TO ADOPTION

For AI skeptics among shoppers who were surveyed, concerns were also visible. 19.6% of survey takers indicated they either mostly or completely distrust AI recommendations. At the same time, 53.8% of shoppers cited privacy and data worries.

Asked which features they would like to see improved in the coming year, answers were mixed. However, a survey-high 21.2% cited dynamic pricing and personalized discounts when responding to this question.

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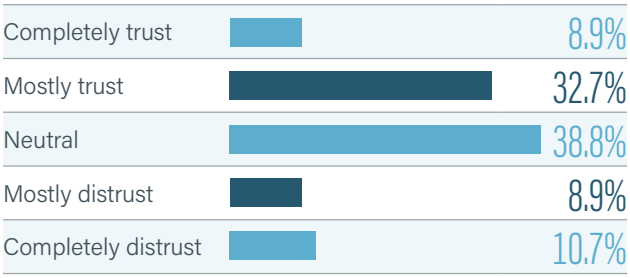
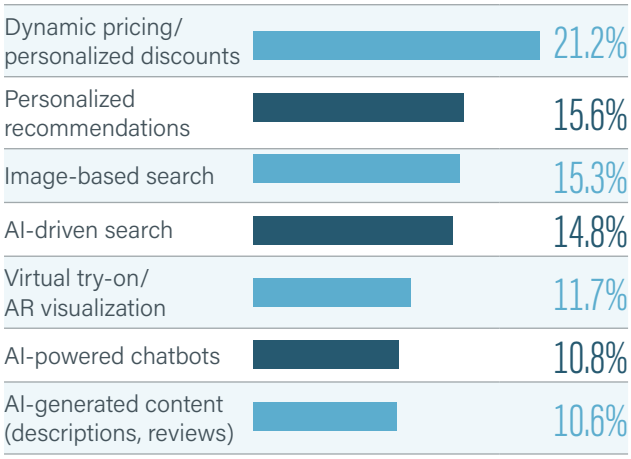
For online retailers looking to map their technology investments to what their customers want to see, this zone of personalized experiences and value appears to be where interest awaits. **LV**

HOW MUCH DO YOU TRUST AI-DRIVEN RECOMMENDATIONS AND CONTENT WHEN SHOPPING ONLINE?



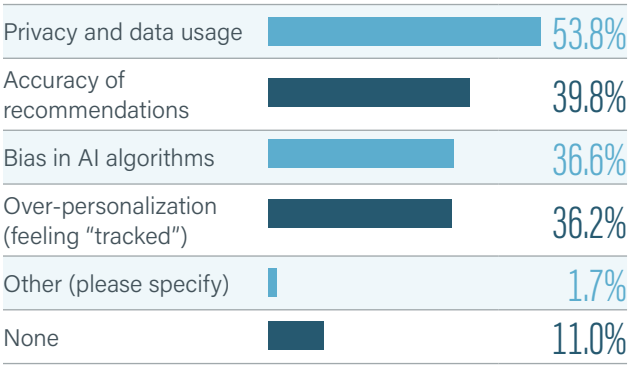
Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

WHICH OF THESE AI-POWERED FEATURES WOULD YOU MOST LIKE TO SEE IMPROVED IN THE NEXT YEAR?



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

WHAT CONCERNS, IF ANY, DO YOU HAVE ABOUT AI IN ONLINE SHOPPING?



Source: Digital Commerce 360 and Bizrate Insights survey of 1,026 consumers; October 2025

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HOW ONLINE RETAILERS ARE PUTTING AGENTIC AI TO USE

In July, Suresh Kumar, the global chief technology officer and chief development officer at Walmart, announced that a new, multipronged push that the retailer was making with its artificial intelligence efforts would bring automation and advanced decision-making capabilities to multiple areas of business and operations.

"We've been building agents — fast — for every aspect of the business," Kumar stated.

Specifically, he was referring to four AI agents — which Walmart calls "super agents." Walmart built them with large language models to not only execute tasks on behalf of humans, but also to operate less agents that function within the super agents' scopes of duty.

Examples include agents that help shoppers, as well as associates working within stores and even the developers that build Walmart's internal software. The vision echoes what Marc Benioff, the CEO and chairman at cloud software giant and ecommerce platform provider Salesforce, refers to as "the agentic enterprise." At the annual Dreamforce conference in San Francisco in October, Benioff described that vision as one "where AI elevates human potential like never before."

Salesforce announced its own agentic offering, Agentforce, at Dreamforce in 2024 and used the conference in 2025 to show off agentic use cases that extend to commerce, customer service and other operations-facing roles that initially characterized Agentforce's rollout.

Shibani Ahuja, senior vice president of enterprise IT strategy at Salesforce, frames most agentic AI offerings as falling into one of four levels of maturity. First, to be considered agentic, she says that AI must perform functions beyond fixed rules and repetitive tasks. She

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calls this first level "information retrieval agents," which are able to complete basic research and intuit the correct information to collect, browsing websites and files and even making recommendations as a result.

Subsequent levels involve tasks such as scheduling meetings and automating emails, on up to through the fourth level, which is characterized by working across systems and even with other agents, as Walmart super agents are designed to do.

As online retailers put these agents to use, here some of the most prominent use cases:

AGENTIC COMMERCE

In 2025, agentic commerce became a new battleground for generative AI in online retail. Some of the biggest names in technology and commerce, including OpenAI, Google, Amazon and Walmart, have made early moves, and web browsers are just one front where the results are playing out.

Agentic commerce can be characterized as the use of agentic AI for the purposes of shopping on behalf of customers. It was a use case for OpenAI's Operator agent, which debuted in January on a limited basis. Since then, the company launched its Atlas web browser, powered by ChatGPT, in October, which enables users to put the LLM to use browsing and interacting with websites, including ecommerce sites.

In addition, OpenAI rolled out its Agentic Commerce Protocol, co-developed with the payments vendor Stripe, for what it calls an "Instant Checkout" experience within ChatGPT. Early partners included Etsy and Shopify, with Salesforce and Walmart also announcing participation just weeks later.

In the meantime, Perplexity, a generative AI-based search platform, tested and made public its own Comet web browser, which competes with Atlas and Google's Chrome browser. For its part, Google also launched its own Agent Payments Protocol (AP2), to enable transactions with direct shopper involvement. Visa and Master unveiled tools as well.

Elsewhere, Amazon has built out its own capabilities through its Rufus assistant and new features bundled as Alexa+, which are introducing agentic options for its customers and Prime members.

AGENTIC SUPPLY CHAIN MANAGEMENT AND FULFILLMENT

Behind the scenes, other agents are focused on operations. Marty, one of Walmart's super

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agents, is tailored specifically for dealing with needs among the retail giant's partners, including suppliers, sellers and advertisers.

Meanwhile, Williams-Sonoma announced it was using Salesforce's Agentforce features to leverage agentic AI for its own supply chain needs, in addition to product development, merchandising and other areas.

At Amazon, the company is piloting its Project Eluna agent to aid operations at a fulfillment center in Tennessee. According to Amazon, the agent is meant to reduce cognitive loads for operations managers, automating some decisions and anticipating issues where intervention may be required. It is designed to field questions such as "Where should we shift people to avoid a bottleneck?" and respond with actionable recommendations.

CUSTOM SERVICE AGENTS

One of the most recognizable use cases for agentic AI in ecommerce is customer service. Chatbots have a long history of use on ecommerce sites, but new implementations are adding advanced capabilities and empowering agents to do more on behalf of shoppers.

Customer service was a point of emphasis for Salesforce at Dreamforce in 2025. The company showcased work it had done with the Danish jewelry retailer Pandora to create the brand's customized Clara agent. David Walmsley, chief digital and technology officer at Pandora, spoke about the goals it had with Clara, as well as another shopper-facing agent named Gemma, during Dreamforce's opening keynote.

"You could spend an hour in-store with one of our wonderful associates putting together a bracelet for your loved one and talking about your family," said Walmsley. "That richness of conversation is the heart of the Pandora experience and always will be. We want to figure out how to bring that online."

By giving Clara access to Pandora's customer data through Agentforce Commerce, the assistant can give customers context-aware feedback about shipment statuses or other inquiries, saving Pandora's valuable time for Pandora's human team members.

Pandora shared that Clara had already deflected 60% of customer service cases it encountered. In addition, the net promoter score increased by 10% when customers began using it. **LV**

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ECOMMERCE SITES/PLATFORMS

Ecommerce sites require year-round maintenance and upgrades. Thanks to competition and customer behavior, retailers need to constantly adjust their websites to add better technology. On the front end, that may mean tech that makes shopping easier on consumers — or just looks better.

Think: Easier navigation, better page design or fewer pages at checkout. On the back end, merchants may invest in tech that comprehensively collects all the data retailers gain from transactions and consumer shopping behaviors, making it easier to analyze and plan ahead.

In either case, a site's evolution is nonstop. Slow, visually unpleasant and outdated ecommerce websites can hinder the consumer experience. What retailers prioritize must factor in their own needs as well as emerging consumer trends.

SHARKNINJA'S NEW DTC ECOMMERCE SITE

Consumer electronics brand SharkNinja long operated two distinct ecommerce websites. One was for its Shark brand, known for its vacuum cleaners and related devices. The other was for its Ninja brand, which is known for its blenders and other kitchen appliances.

The two brands were distinct companies prior to a 2015 merger. For SharkNinja, a website relaunch served two key purposes:

1. To unify its two brands onto a single ecommerce website.
2. To adopt new technology; namely: artificial intelligence (AI) agents.

Selecting Salesforce as its ecommerce platform of choice, SharkNinja's CEO said the software provider's technology accelerates the retailer's ecommerce capabilities.

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Now, SharkNinja is using Salesforce's Agentforce primarily for customer support. In doing so, the platform allows the retailer "to focus on high-value interactions that deepen consumer relationships. In parallel, SharkNinja is extending this support to its wholesale partners, helping to enhance their own digital storefronts to deliver stronger, more connected shopping experiences for consumers everywhere," SharkNinja announced in October.

The new website also includes recipes, community stories and user-generated content, the retailer noted. It uses Salesforce Commerce Suite.

The retailer added that its new website "integrates a social-first experience" to help consumers learn more about its products and engage with the company. Post-purchase, consumers can access a hub for warranty information, frequently asked questions (FAQs), parts and accessories.

SharkNinja's new website launched in October 2025, but the brand had been preparing for the relaunch since at least June. It uses a Salesforce-powered AI agent for a chatbot-like feature that helps SharkNinja learn about the conversations consumers are having, according to Calvin Anderson, senior vice president of global digital experience.

"It's certainly more than a standard [chatbot], just like ChatGPT is just wildly different than a Google search was," said Anderson. "It is finally worth giving your attention to AI and chat on a website. That is the primary consumer experience."

HIBBETT SPORTS DEBUTS A WEBSITE FOR KIDS' PRODUCTS

Hibbett Sports launched a new website and mobile app with a specific goal in mind: boost sales of products for kids.

It created a dedicated site for youth sports, KidsHibbett.com, that includes integration with its rewards program as well as customer service chat and buy now, pay later (BNPL). The retailer focused on efficiency and search options in creating the site. Consumers can filter search results by new arrivals, gender, size, color, brand, price, clothing or shoe type and trend.

The launch came as Hibbett extended its contract with Digital Wave Technology. The software provider's product experience management (PXM) software helps improve how — and what — consumers see on the retailer's product listing page. That kind of experience can quickly make or break a sale. The data needs to be clear, informative and searchable.

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Hibbett said the contract renewal reflects its commitment to achieving a measurable impact on scaling product content, streamlining internal processes and enhancing its digital shopping experience.

"Digital Wave's PXM has been instrumental in improving content accuracy, team alignment and time to market," said Bill Quinn, Hibbett's chief information officer, about the renewal.

Digital Wave's solution helps Hibbett improve its operational efficiency, expand its merchandise assortment and manage inventory, according to the retailer — all of which play a role in improving customer experience.

AI AGENTS ARRIVE TO ECOMMERCE SITES

Already among the leading ecommerce platforms in online retail, Salesforce, which builts its name in cloud and customer relationship management software, wants to cement its name in yet another sphere: agentic commerce.

Working with OpenAI, other technology companies and a variety of retailers already using its platform, Salesforce recently launched its Agentforce 360 platform. Building off of its existing Agentforce offering, the platform is what Salesforce refers to as the technology suite that enables its clients to create new artificial intelligence (AI) agents to cater to clients' respective needs.

Agentic AI refers to layers of software that can proactively make decisions for users. Extending that concept to online purchasing, agentic commerce allows AI to make purchases on users' behalf within specified parameters. That could include, for example, a consumer asking ChatGPT to find a product with certain specifications and purchase it for the user. On websites where retailers open their software to such functionality, that would mean an AI agent could browse a site, add one or more items to a cart, then check out on behalf of the user — without the user having to oversee each part of the process.

And for ChatGPT, specifically, that would include leveraging OpenAI's "Agentic Commerce Protocol." Along with payments provider Stripe, OpenAI co-developed and open-sourced the protocol. The companies said the protocol allows ChatGPT to send "necessary details" to a merchant's back end upon initiating an order. From there, a merchant can accept or decline the order. Merchants that are existing Stripe customers have the option to enable payments within their site's code, OpenAI noted.

Some of North America's leading online retailers already use Salesforce's Agentforce. It's clients include:

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- Williams-Sonoma. Using Agentforce to develop interior design agents that can understand consumers' preferences surrounding style and products. They also walk consumers through the entire process, helping the retailer to deliver interior design services "at a scale and level of quality that's just unprecedented," according to Sameer Hassan, chief technology and digital officer.
- SharkNinja. Primarily using AI agents for customer support so it can "focus on high-value interactions that deepen consumer relationships," said CEO Mark Barrocas.
- PepsiCo. Tasking its AI agents with customer service, field sales, marketing and supply chain execution. The brand is also using Agentforce to reshape its ecommerce strategy to support a growing ecosystem of retailers, distributors and digital marketplaces.
- Saks Fifth Avenue. Using it "to meet luxury consumers' increasing demands for a highly personalized shopping experience," according to Saks Global CEO Marc Metrick.

Meanwhile, in addition to working with Salesforce, OpenAI has launched "instant checkout" for online marketplace Etsy. OpenAI is also working with eBay and Instacart, with plans to extend its technology to Shopify merchants. **LV**

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ONLINE MARKETPLACE MANAGEMENT

In 2025, some of North America's largest online retailers have launched or upgraded their digital marketplaces — and in a variety of ways. Others have navigated the online marketplace space in a way that allows them to capitalize on fulfillment services from retailers with marketplaces such as Amazon, Walmart, Target, Best Buy and Ulta.

In the case of Liquid I.V., success selling on Amazon has helped expand brand awareness. For the third year in a row, it became a top seller during Amazon's summer Prime Day event. It took third in 2025 for the most sold product on Amazon's marketplace during the event. It was also in the top five the prior two years.

Aaron Jones, vice president of ecommerce for the brand, identified availability as a key factor.

"We are so frequently being shipped on the same day that people order it," Jones told Digital Commerce 360. "The ability to have an order come to your house on the same day, or next day, or morning of is a really, really powerful benefit that Amazon has, of course, and their reach and ability to find new customers is just really unparalleled. It definitely plays a unique portion within our business."

Liquid I.V. also benefits from offering subscriptions through Amazon as well as on its own direct-to-consumer website. However, it offers subscriptions differently depending on the channel. On Amazon, consumers can choose from pre-set options that Amazon will automatically replenish. On its own site, consumers can mix and match products to create a more customized set with each delivery.

MIRAKL'S MARKETPLACE SOFTWARE

Best Buy and Ulta Beauty both launched online marketplaces in 2025 using technology from software provider Mirakl.

Best Buy made its marketplace available through its website and mobile app. By adding third-party merchandise, it has more than doubled the number of products consumers can buy online through the retailer.

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Frank Bedo, Best Buy's chief digital officer, described the marketplace as an extension of the retailer's existing platform rather than a separate channel.

"In addition to the products you know and love from Best Buy, you'll now also see items sold by third-party sellers, all in one seamless experience," he said after the retailer launched the platform.

Best Buy sells its marketplace items exclusively online but will tie them into store operations. Customers will be able to return most third-party purchases to Best Buy locations. Store associates will also assist customers by building shopping carts online, even for items not stocked on shelves.

The move places Best Buy in line with competitors Walmart and Target, both of which have expanded their third-party seller marketplaces to broaden assortments and drive ecommerce growth.

Similarly, Ulta Beauty has launched what it calls the UB Marketplace. The online platform expands the retailer's product assortment beyond its traditional beauty lines and into wellness and lifestyle categories. As with Best Buy's, consumers can access the UB Marketplace through Ulta's website and app.

Shoppers can search and buy from both Ulta Beauty and UB Marketplace through one account and checkout process. Eligible purchases earn Ulta Beauty Rewards points and can be returned by mail or at any of Ulta's 1,400 stores through Happy Returns, according to the retailer.

Lauren Brindley, chief merchandising and digital officer, said the online marketplace gives Ulta Beauty a way to add products quickly while maintaining quality control.

"UB Marketplace allows us to deliver more newness, faster entry into emerging subcategories and trends, and deeper category authority — while keeping the guest experience unmistakably Ulta Beauty," Brindley said.

Ulta has also limited marketplace participation to brands it has invited rather than third-party resellers. It said that helps ensure consistency in product quality and service.

Also in 2025, Mirakl and Shopify expanded their partnership with a software integration aimed at helping enterprise merchants launch and manage online marketplaces more efficiently. The new Mirakl Platform Connector for Shopify allows large businesses to integrate marketplace operations such as product catalogs, orders, taxonomy and seller data directly within Shopify's commerce platform. According to

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both companies, the tool is designed to reduce setup time by up to 80%.

The connector builds on Mirakl's existing presence in the Shopify App Store through its Mirakl Connect app and adds support for enterprise needs, including mixed first-party and third-party checkout and compatibility with both Shopify storefront themes and headless architectures.

"Enterprises are increasingly looking to launch marketplaces as part of their commerce strategy," said Bobby Morrison, chief revenue officer at Shopify. "This integration simplifies that process."

ALDI'S DELIVERY-FOCUSED MARKETPLACES

Grocery chain operator Aldi is managing two delivery-centered marketplaces: Instacart and Uber Eats.

Aldi operates an ecommerce website of its own, as well as one using Instacart technology. Additionally, it also offers a storefront on Instacart's marketplace. In September 2025, Aldi announced it would sell through the Uber Eats platform as well.

Aldi operates more than 2,500 locations in the U.S., which Uber Eats said makes the retailer "instantly" one of the largest grocery banners on its platform.

Aldi joins Best Buy, Dollar Tree, Sephora and DSW in joining Uber Eats since August. At the end of August, Merchants Distributors began working with Instacart to offer same-day delivery to independent grocers. In January, Home Depot added delivery options through both DoorDash and Uber Eats.

Whereas Uber Eats, Instacart and DoorDash operate differently than other marketplaces, they play key roles in expanding the customer bases and fulfillment speed of retailers with physical stores. Instacart has added in-stock visibility features to its platform — a move that could please consumers and retailers alike. It's attempting to avoid these unwanted substitutions and lost sales with new features it is calling Store View and Second Store Check.

"Each customer order updates our view of what's in a store, and what's not, one item at a time," according to Daniel Danker, chief product officer.

He added that Instacart's network of approximately 600,000 shoppers already collect over 10 million data points daily as they pick orders, identify out-of-stocks, and make substitutions.

"When we combine all of this information, Instacart can form a more accurate, real-time understanding of what's happening in a grocery store, so you get the ingredients you need when you want them," Danker said. **LV**

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EMAIL AND DIGITAL MARKETING

The way merchants approach digital marketing is shifting as retailers increasingly develop and flesh out their retail media networks. And they're fueling them through membership and loyalty programs, apps, ecommerce websites and more.

Albertsons, Kroger, Walmart, Target and Costco are all increasing their online grocery sales by learning from the first-party data they gather. These retailers are in perhaps the best position to grow their retail media networks, with large physical-store presences, trusted ecommerce sites and millions of rewards-program members.

Costco has "launched more relevant messaging" on its homepage to highlight different offers depending on individuals' membership type and co-brand credit card status, according to chief financial officer Gary Millerchip.

The increase in site traffic and Costco's targeted "digital capabilities are also a key enabler for retail media, as they allow us to target specific ads that deliver greater value for both members and suppliers while always honoring the privacy choices of our members," he added.

And its 81 million paid household members — and 145.2 million cardholders — are making decisions in their in-store and online shopping daily that Costco factors into its digital marketing.

Millerchip provided an example to investors that Costco launched a series of marketing campaigns for Kimberly-Clark, which produces products from brands including Kleenex, Huggies and Scott. Costco's retail media campaigns for Kimberly-Clark generated:

- 14:1 return on ad spend
- 22% increase in traffic to product detail pages (PDPs)
- 45% increase in digital sales for the promoted items

Costco uses the GrowthLoop platform and its Compound Marketing Engine to inform its retail media network approach. For Costco, that means guiding how it segments audiences and leverages first-party member data to better target its advertising.

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Costco's retail media team uses GrowthLoop's tools to optimize relevant messaging and content for advertisers looking to reach Costco members.

TARGET PUTS FIRST-PARTY DATA TO USE FOR RETAIL MEDIA

Meanwhile, Target has added an artificial intelligence (AI)-powered feature to its retail media network, Roundel, called Precision Plus. It helps advertisers optimize offsite campaigns by using Target's first-party data. Target said more than 30% of Roundel's partner media spend now happens off its owned platforms, including placements on social, streaming and other digital channels. That compares with a 15% industry average for offsite spend in 2023, per Advertiser Perceptions.

According to Target, early results from internal Roundel data showed:

- 55% reduction in cost per thousand impressions (CPM)
- 843% increase in click-through rate (CTR)
- 103% lift in return on ad spend (ROAS)

ALBERTSONS CONNECTS DATA INSIGHTS ACROSS CHANNELS

For Albertsons, growing its retail media collective is one of its top five strategic priorities.

"While our ecommerce penetration is still below industry peers, it is one of our biggest growth customer acquisition and customer retention opportunities for 2025 and beyond," said CEO Susan Morris.

Albertsons has partnered with TransUnion, a credit reporting firm known for data and analytics, to bring in its TruAudience marketing mix modeling (MMM) solution. The tool helps brands connect the dots between their ads and real-world business results. Together, the solutions aim to help brands better optimize their ad strategies, with the ultimate goals of increasing sales and return on investment.

According to Albertsons, the aggregate-level campaign data is sent directly to a brand's own dashboards or analytics tools, as well as agencies and measurement partners. Since the sharing happens in near real-time, advertisers can quickly see how their campaigns are performing and make adjustments, like changing targeting or budgets.

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ACE HARDWARE'S EXPANDING AD CAPABILITIES

Outside of the grocery space, Ace Hardware is selling advertising to brands through a variety of digital and in-store channels. To deliver those ads, it's using a platform from Epsilon Retail Media.

Ace Hardware listed Pacvue, Flywheel and Skai as platforms with which its retail media network will be interoperable.

Among the places where Ace will display RedVest advertising:

- On-site premium ads, search and display
- Email and push messaging
- In-store signage
- Off-site programmatic: display, video, connected TV (CTV) and mobile

It prioritizes control and visibility, providing brand partners with real-time ad campaign performance that will track impact, as well as ecommerce conversion.

PETCO SHARES ITS MEDIA NETWORK WITH THIRD-PARTY BRANDS

Petco has also opened its retail media network to brands that don't sell their products through the retailer.

Working with ecommerce technology provider Rokt, Petco is allowing non-endemic brands to advertise through its retail media network platform.

"With Rokt's network of non-endemic advertisers, we're delivering offers and resources that are highly relevant to our online customers, enhancing their overall customer experience," said Tony Gabriele, vice president of digital strategy.

Gabriele said partnering with Rokt has helped the retailer bring "more relevant and thoughtful offers" to consumers. By working with brands that don't sell through Petco, the retailer is opening its platform in a way that gives consumers more choices.

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In summer 2025, Rokt announced it would acquire Canal, a San Francisco-based ecommerce platform. The companies' leaders heralded what the deal could mean for checkout and other experiences they are able to provide.

"This acquisition not only expands our products and the Rokt Network; it redefines the advantage we provide to our ecommerce partners," said Bruce Buchanan, CEO and co-founder of Rokt. "By integrating Canal's catalog with our AI-powered Rokt Brain, we're unlocking a new level of relevancy that makes the shopping experience better for every consumer."

NEWELL BRANDS PICKS UP GENERATIVE AI TOOLS TO MAKE CONTENT

Newell Brands — the maker of consumer products including Sharpie and Rubbermaid — is expanding its use of Adobe's generative AI tools to improve marketing operations and content production across its global portfolio.

It will integrate Adobe Firefly and Adobe Express into its marketing workflows. The aim is to speed up content creation, standardize branding across regions, and support omnichannel campaigns amid growing demand for digital assets on social media, ecommerce and retail platforms.

"We ultimately decided to expand our partnership with Adobe, with tools that can be used directly in our existing workflows," said Melanie Huet, co-CEO of Newell's home & commercial segment.

Newell will use Adobe's Firefly Services to automate time-consuming tasks such as image resizing and background replacement. Newell also plans to implement Firefly Custom Models, trained in its proprietary brand assets, to ensure consistency in visual output.

According to the company, early adoption of Adobe Express led to a 75% reduction in content production time for Paper Mate packaging and a 33% improvement in social media asset creation for the Oster brand in Latin America. **LV**

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FULFILLMENT

Ecommerce fulfillment is no longer a background function — it's a front-line differentiator. In 2025, the most successful brands and distributors are transforming fulfillment from a cost center into a growth engine by fusing automation, network design and real-time visibility.

Consumer expectations have changed permanently. Two-day shipping is now the baseline, and shoppers expect constant order updates, fast and transparent returns and minimal environmental impact. In this climate, fulfillment providers have become partners in brand experience, not just shipping contractors.

Third-party logistics (3PL) companies and software vendors are responding with a wave of innovation. Multi-node networks are replacing centralized distribution, enabling inventory to move closer to demand. Autonomous mobile robots and automated picking systems are cutting labor bottlenecks while improving accuracy. Post-purchase software platforms now extend visibility beyond the warehouse, providing customers and service teams with real-time delivery and return data.

The newest fulfillment trend is orchestration — using predictive analytics and automation to decide, in real time, which node should ship an order, which carrier to use and how to communicate every step to the customer.

RADIAL HELPS COYUCHI SCALE

Organic home-goods retailer Coyuchi turned to fulfillment partner Radial after a single season exposed the limits of its in-house operation.

The Northern California brand — known for organic bedding, linens and apparel — saw online sales soar 400% above forecast during a critical holiday period. The spike came as Coyuchi was migrating its ecommerce platform and preparing a new gifting program, leaving little room for error. To compound the challenge, a supplier delay forced a last-minute substitution in its gift-with-purchase promotion, compressing timelines and threatening to derail order fulfillment.

Radial responded by flexing labor across its network and rebalancing inventory to the nodes closest to demand. The 3PL's fulfillment centers already managed omnichannel brands with fluctuating peaks, allowing it to absorb Coyuchi's surge without disruption. Radial also executed specialized packaging and unboxing

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requirements designed to protect Coyuchi's premium image — no small task given the spike in order volume.

"Radial is a valuable partner who truly understands the needs of a growing ecommerce business like ours," said Marcus Chung, chief operating officer at Coyuchi. "Their ability to scale quickly and offer tailored solutions not only helped us navigate a demanding peak season but also gives us the confidence to explore future initiatives."

Sustainability was central to the plan. Radial placed Coyuchi's inventory in a facility with renewable-energy operations and route optimization that reduced transportation emissions by 13% compared with the company's previous 3PL. Returns processing was redesigned to speed up refunds and inspection cycles, cutting turnaround times for resale of returned goods.

Radial's fulfillment systems and data tools gave Coyuchi real-time visibility into order flow, enabling same-day reporting on service-level adherence and exceptions. That visibility proved critical when demand continued to exceed expectations throughout the season. The company maintained on-time delivery performance near 100%, according to Radial's report, and avoided the customer complaints that often accompany rapid scaling.

What could have been a chaotic peak instead became a validation of a new model — flexible, sustainable and data-driven. Radial's approach allowed Coyuchi to preserve its brand values of quality and environmental responsibility while building the operational muscle to support future growth.

GEODIS AND BLACK RIFLE COFFEE BOOST THROUGHPUT WITH WAREHOUSE ROBOTS

Geodis and Black Rifle Coffee Company are proving that automation and human expertise can coexist to deliver faster, more reliable fulfillment.

The veteran-founded coffee brand has built a loyal following through direct-to-consumer sales and subscription programs, but growth had outpaced the capacity of its legacy systems. To manage higher order volumes and rapid promotions, Geodis designed a new fulfillment hub in Mount Juliet, Tennessee, built from the ground up for robotics integration.

The facility features Locus autonomous mobile robots (AMRs) that work alongside human pickers to transport items across the warehouse floor. The deployment immediately delivered results: picking productivity jumped from 100 to 170 units per hour, a gain of 70%, while new-employee training time fell by 95%, from a full shift to about 20 minutes.

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"During peak, Locus support was on-site to make any necessary adjustments to the LocusBots in real time," said Theresa Marsic, director of operations at Geodis. Aaron Gettler, senior operations manager, added that the short training curve allowed teams to bring seasonal labor up to speed instantly.

The robotics system integrates with Geodis's warehouse-management and execution platforms, optimizing travel paths and order batching. Real-time data dashboards help supervisors track pick density, congestion and cycle times, allowing them to reallocate labor or re-route robots on the fly. When a traffic bottleneck emerged during the first holiday rush, Locus engineers adjusted navigation software in minutes to restore flow.

Geodis said the model improves not only efficiency but also morale. Employees now focus on quality checks and exception handling instead of long-distance travel between aisles. The collaborative setup reduces fatigue while maintaining the precision demanded by Black Rifle Coffee's fast-moving product lines.

The partnership demonstrates how robotics are reshaping fulfillment economics. Instead of hiring waves of temporary labor each quarter, Geodis can maintain a smaller, skilled workforce supplemented by automation that scales instantly for surges. The Mount Juliet facility has since become a template for other Geodis clients seeking to modernize their direct-to-consumer operations.

For Black Rifle Coffee, the impact is measurable in both service speed and consistency — critical advantages for a consumer brand built on fast shipping and reliability.

NARVAR HELPS FORTNUM & MASON TURN TRANSPARENCY INTO A COMPETITIVE EDGE

Luxury retailer Fortnum & Mason has cut customer inquiries about order status by 50% after integrating Narvar's post-purchase communication platform, demonstrating how software-driven visibility can elevate even centuries-old brands.

Fortnum & Mason, founded in 1707, is synonymous with high-end gifting — from tea hampers to fine chocolates — but the move to digital sales during and after the pandemic exposed weak spots in delivery communication. Customers were inundating call centers with "where-is-my-order" (WISMO) questions, particularly during Christmas and Valentine's Day, when gifts must arrive on precise dates.

To fix that, Fortnum adopted Narvar Track & Notify, which automates proactive delivery updates for both senders and recipients. The system sends branded notifications as soon as

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an order is processed and continues through each carrier scan, including pre-transit alerts before packages enter the mail stream. Narvar also integrated its tracking data into Zendesk, enabling support agents to view shipment progress without toggling between systems.

"With gift giving there comes a certain amount of anxiety for the giver," said Rhonda Floyd, head of customer success at Fortnum & Mason. "If there's any uncertainty around where the package is and when it will be delivered, it can ruin the entire experience." She added that the Narvar-Zendesk integration "makes it much quicker for support representatives to access tracking information."

After rollout, WISMO inquiries fell by half, and Trustpilot ratings climbed from 1.9 to 4.5, reflecting customers' improved confidence. Encouraged by the results, Fortnum extended the system to returns and exchanges. Using Narvar Returns & Exchanges, the retailer now provides automated status updates when a return is received, inspected and refunded — reducing the number of follow-ups calls about refunds.

Narvar's platform reinforced Fortnum's reputation for reliability without altering its logistics infrastructure. The software simply made shipment and return data visible to both customers and service teams in real time. That transparency became a brand asset — transforming post-purchase operations from a reactive cost center into a proactive customer-experience tool.

The project also positioned Fortnum for global growth. With its ecommerce volume increasing in Asia and North America, the retailer can now deliver the same standard of service to international buyers that London customers experience in-store. As Floyd noted, transparency isn't just about information; it's about preserving the sense of care that defines the brand.

For retailers and distributors alike, the message is clear: fulfillment has evolved into the ultimate brand touchpoint. Whether it's a robot moving coffee, a warehouse team preparing a luxury bedding order or a digital alert confirming a gift's arrival, every step now matters to customer loyalty. **LV**

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CONCLUSION

No area of ecommerce technology has been untouched by AI, and the judgment calls retailers face involve where, when, how and why to use AI for the best results. The arrival of AI agents has put additional pressure on chief technology officers to not only choose the best vendors and software, but also ensure that new solutions receive the necessary supervision, data and strategic guidance to provide return on investment.

From customer service and marketing to supply chain management and fulfillment, the largest players in online retailers are already rolling out agents widely across operations. While most retailers lack the internal resources of Amazon and Walmart, vendors are competing to reach everyone else with ecommerce sites, agents and other offerings that can help merchants to punch above their respective weight classes and compete at higher levels.

When used well, AI can deliver wins for retailers' customers, team members and bottom lines. As with other aspects of business, getting the right mix can be art, as well as a science, but — thanks to AI — the science and analysis is getting easier, even at scale. **LV**

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LEADING VENDORS CATEGORIES

METHODOLOGY

The following pages identify the Leading Vendors to the Top 1000, a ranking of the ecommerce technology and service companies that the Top 1000 e-retailers in North America rely on the most.

To determine each vendor's ranking, Digital Commerce 360 compiled a list of clients each vendor serves among the retailers ranked in the 2025 Digital Commerce 360 Top 1000, totaling the number of clients across 24 categories. Rankings are based on the number of Top 1000 clients held by each company in each technology category and include both technology platforms and agencies. Only parent companies of retailers are included.

Digital Commerce 360 identifies merchants' technology providers by confirming them directly with retailers, through a third-party data source, or via the vendor.

Charts and rankings take into account consolidation among ecommerce technology providers, unless otherwise noted. Client counts for some vendors in the rankings include the services provided by companies they've acquired or merged with in recent years.

Full-page company profiles are paid for by advertisers and the rankings were compiled by Digital Commerce 360 researchers and editors. **LV**

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CUSTOMER RATINGS & REVIEWS

Ratings and reviews can help inform a retailer's business and product decisions. Retailers can harness feedback data to ensure customers are satisfied and improve upon any issues. Vendors can enable retailers to have a ratings and reviews platform on their product detail pages with comments, as well as photos, to better inform both the retailer and other customers who are shopping for the same, or similar, products. Retailers can also use social media posts to gather customer feedback and data about products.

1. Bazaarvoice
2. Bizrate Insights
3. Trustpilot
4. Google
5. PowerReviews
6. Pixlee TurnTo
7. Yotpo
8. Verint
9. Shopper Approved
10. ResellerRatings

Source: Digital Commerce 360

Category leaders are ranked on the total number of clients they have in the 2025 Digital Commerce 360 Top 1000. Only parent companies of the retailers are included.

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BIZRATE INSIGHTS

RANK IN CATEGORY 2

bizrate insights

2025 TOP 1000 RETAIL CLIENTS 117

Bizrate Insights, a People Inc. company, is one of the largest sources of verified customer-generated seller ratings and reviews, helping both retailers and consumers make informed decisions. It collects over 25 million surveys annually from thousands of retailers across North America, making it a top source for UGC like verified customer reviews, syndicated seller ratings, and product feedback. These are aggregated to deliver real-time KPIs for a 360° view that enables merchants to create outstanding customer experiences, reduce site abandonment, and sharpen their marketing strategies.

PRIMARY URL

bizrateinsights.com

YEAR LAUNCHED 1996

TOTAL 2025 TOP 1000 CLIENT WEB SALES $47.46 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: 58 Chain: 25 Manufacturer: 22 Direct Marketer: 12

TOP 1000 CLIENTS BY WEB SALES

$40M or less: 0 $40-125M: 50 $125-500M: 49 $500M or more: 18

KEY CLIENTS

The Estee Lauder Cos. Inc.
Newell Brands
VitaminShoppe.com
Spencer Gifts and Spirit Halloween
Camping World Holdings Inc.
Crutchfield.com

PRODUCTS & SERVICES

Voice-of-Customer Ratings, Reviews, and Data.

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CORPORATE

East Building, Suite 300
225 High Ridge Road
Stamford, CT 06905

MANAGEMENT

Jack Griffin, CEO
Sierra McGuire, President
Lindsay Martinez, SVP, Client Experience & Marketing

Source: Digital Commerce 360

Category leaders are ranked on the total number of clients they have in the 2024 Digital Commerce 360 Top 1000. Only parent companies of the retailers are included.

READING THE LINES OF DATA AND EVERYTHING IN BETWEEN

An executive conversation with **Cheryl Zajac,** Senior Vice VP, Client Insights, Bizrate Insights

Cheryl Zajac, VP, Client Insights at Bizrate Insights shares the types of context its team looks for to pull the most useful information out of survey results — and how human understanding factors in.

Amid the millions of survey questions you handle each year for clients, how do you ensure the human stories behind those numbers aren't lost?

This has been one of the biggest shifts for us in recent years. At Bizrate Insights, we've always been good at scale, millions of surveys and data points, but it's easy to become so focused on the numbers that you lose sight of the nuance behind them. That's something we've been very intentional about, leaning into this area to ensure that we don't lose sight of the people behind the numbers.

To bring that to life, we recently formed a Client Insights Team, a newer function at Bizrate that's reshaping how we interpret and deliver data. They're insights experts who connect the dots between ratings and reviews to uncover why customers feel the way they do. We sometimes pair human expertise with AI to surface patterns more quickly, but we never lose sight of the human nuance. Our insights process always begins and ends with real people.

How do you help retailers connect feedback across online, mobile, in-store and call-center experiences?

Most customers don't think about their shopping experience by channel; they're trying to solve a need. For our clients, connecting these moments into a single story is challenging, so we focus on making holistic journey measurement easy, allowing them to see the end-to-end experience from their customers' perspectives.

Every Bizrate Insights client has access to our full suite of journey measurement surveys, including pre-purchase, purchase/post-purchase, and post-delivery surveys, with no additional fees or survey limits. This flexibility enables them to gather robust feedback to represent various audiences across the entire customer journey, without worrying about budget or data caps.

All this data feeds into our data platform, VitalSigns, where our clients can see how one small friction point in checkout might ripple into service calls or even store returns, for example. Some clients prefer a hands-off approach and review insights independently, while others want us working right alongside them to dig into the results and plan next steps. Either way, the goal is the same: to provide a holistic view of their customer journey and make it as simple as possible to turn that feedback into action.

What approaches do you see help the most in translating data collection to meaningful change for your clients?

The biggest difference with Bizrate Insights is that we're a managed service, not just a survey provider or a data dashboard. We take the time to learn about our clients and their goals, understand their strategy, and become familiar with their customer base, so that when the data comes in, we can read it in context.

That's what turns reporting from data into real insight. A dip in satisfaction doesn't mean the same thing for every retailer. Sometimes it's a supply chain delay, sometimes it's expectations set by competitors or an overall market downturn. We stay close to the data and to the people behind it so that the numbers don't just sit on a report. They drive decisions that enhance the customer experience.

How do you balance quantitative metrics like satisfaction scores with qualitative feedback to surface emotional drivers and customer sentiment?

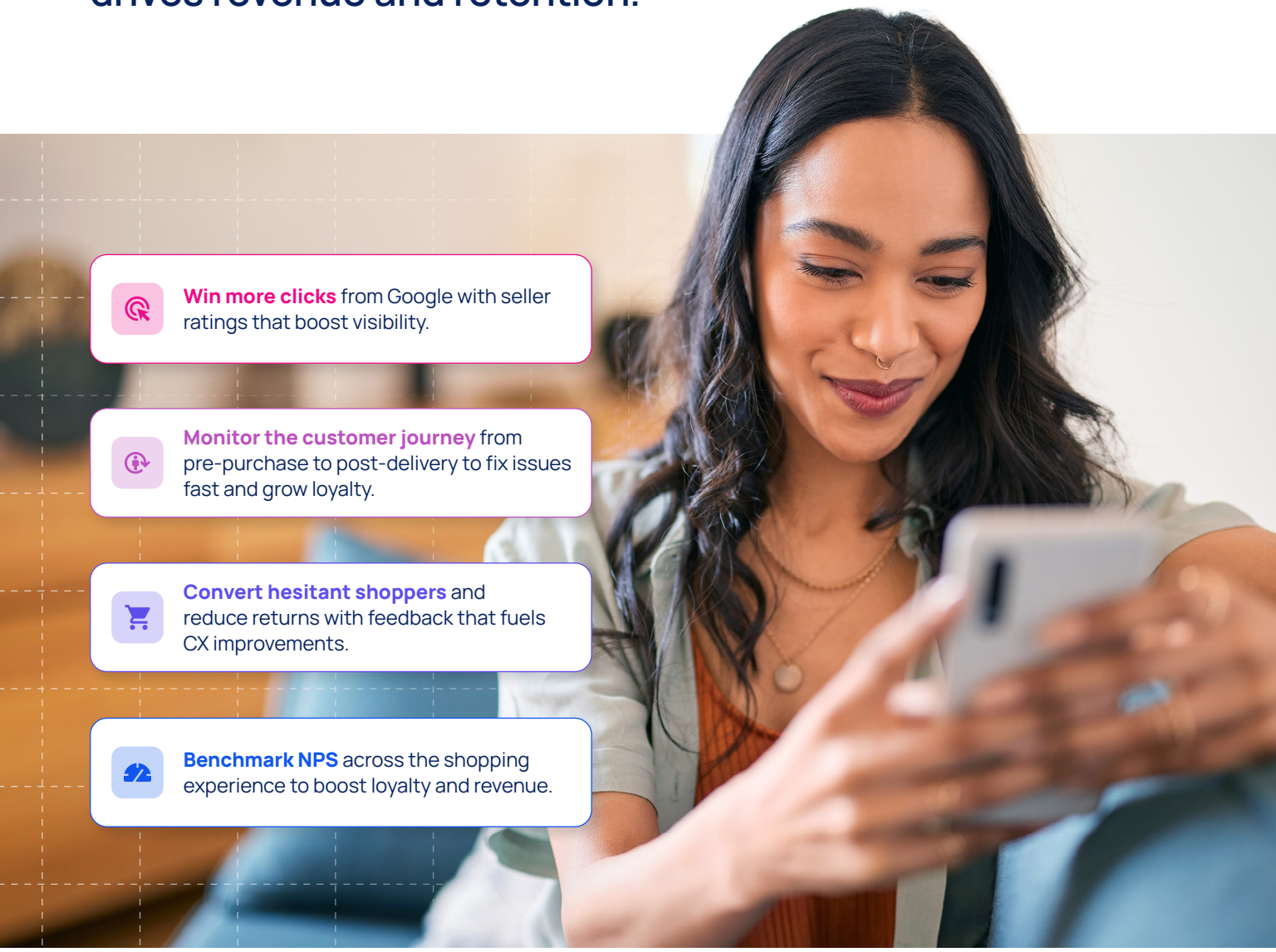
For us, it's a balance of art and science. The science comes from the quantitative data (ratings), the movement in scores, the trend lines, the benchmarks. The art comes from interpreting what those changes actually mean to customers and our clients.

The qualitative feedback (reviews) is a gold mine for understanding nuance and the "why" behind the ratings. AI can help organize feedback themes faster, but it's our people who pick up on the tone and emotion. The combination of scale plus empathy — and human context — gives our clients both precision and perspective. It's how we help our clients act quickly without losing sight of what customers are really saying.

bizrate insights

More sales.
Happier customers.

Turn customer feedback into action that drives revenue and retention.



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ABOUT DIGITAL COMMERCE 360

Digital Commerce 360, formerly Internet Retailer, has been a global leader in retail and B2B ecommerce research and media for over two decades. Our organization provides daily news, trend analysis, and competitive data to a vast community of executives, retailers, financial firms, manufacturers and more. Our team of experienced journalists and researchers publish a multitude of products each year, including dozens of research reports, newsletters, charts and infographics, webinars, live events, and data on thousands of ecommerce companies through its Digital Commerce 360 Research brand. We also founded groundbreaking ecommerce products and events, including Internet Retailer magazine, the Top 500 Guide, the Internet Retailer Conference & Exhibition (IRCE) and, most recently, the EnvisionB2B Conference & Exhibition.

ABOUT DIGITAL COMMERCE 360 RETAIL

Digital Commerce 360 Retail delivers business intelligence and topic-focused reports on the global online retail market. Our reporting on retail trends, technologies and industry best practices reaches a diverse ecommerce community. These exclusive reports are available for download on DigitalCommerce360.com and deliver quality leads to our sponsors.

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