

TRENDS REPORT

The Strategic Imperative For B2B Digital Routes To Market

Evaluate The Range Of Digital Sales Channel Options

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By Stephanie Sissler, Renee Irion with Matthew Selheimer, Matt Alvers, Rick Bradberry,
Beth Caplow, Maria Chien, Joe Cicman, Christina Schmitt, Kiri Bartels, Kate Pierpont

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Summary

Digital sales channels are rapidly reshaping the B2B buying landscape by delivering unprecedented flexibility, efficiency, and reach for both buyers and suppliers. Companies are moving beyond traditional sales models, embracing a mix of digital sales channels — including supplier-operated e-commerce sites, buyer-operated e-procurement, and third-party-operated marketplaces. This report examines the reasons behind the growing importance of digital sales channels and defines the full spectrum of B2B digital sales channel options.

Digital Routes To Market Are Mandatory For Today's Business Buyers

One of the most important decisions sales and marketing leaders must collectively make is determining the best ways to reach, sell, and provide value to potential buyers. This effort is a cornerstone of long-term and annual [revenue planning](#) and begins when leaders consider the potential routes-to-market options (see Figure 1). Go-to-market leaders who don't stay on top of changing buyer behaviors and adapt their routes-to-market strategies risk irrelevance in today's highly competitive buying landscape. For decades, offline routes and offline sales channels that facilitate transactions through suppliers' direct sales teams and channel partners have dominated B2B selling strategies. However, with digital transformation revolutionizing B2B commerce and elevating buyer preferences for self-service, go-to-market leaders must reevaluate the best routes for selling to their target buyers. These routes to market include:

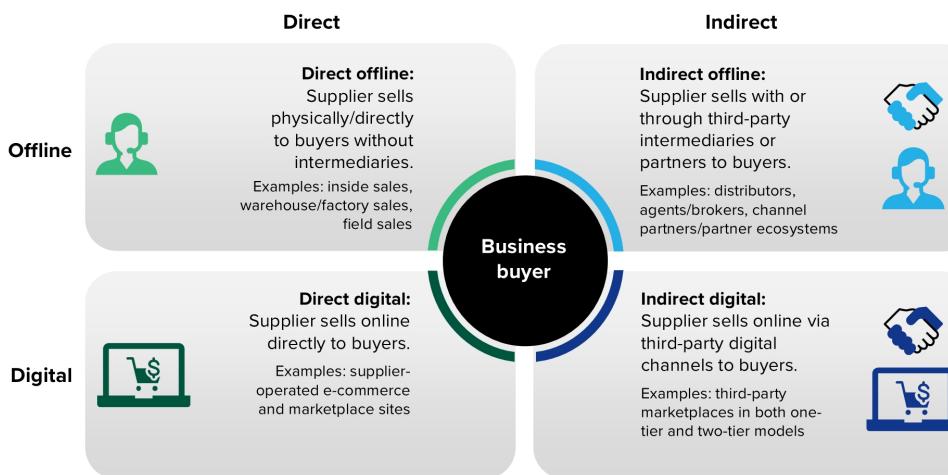
- **Direct offline.** A supplier sells products or services directly to buyers through an offline (i.e., human) sales team without intermediaries.
- **Indirect offline.** A supplier sells products or services to buyers through one or more third party's offline sales team, such as value-added resellers, distributors, and agents/brokers.
- **Direct digital.** A supplier sells their own products and services, or also complementary third-party products and services, to buyers directly online (e.g., through an e-commerce site or marketplace) without human assistance.
- **Indirect digital.** A supplier sells products or services to buyers through one or more third-party digital platforms (i.e., marketplaces) without human assistance.

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Figure 1

The Four B2B Routes To Market



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The Surge In Digital Sales Transactions Is Too Compelling To Ignore

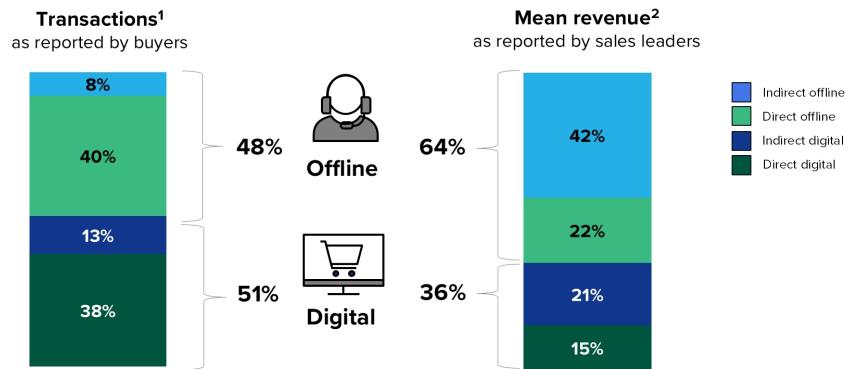
According to [Forrester's Buyers' Journey Survey, 2025](#), half of business buyers indicate their transactions were executed through a digital route to market. From the supplier side, sales leaders report in [Forrester's B2B Sales Survey, 2024](#), that, on average, more than a third (36%) of revenues are derived from digital routes to market (see Figure 2). Simply stated, if you aren't deriving at least that amount of revenue through digital sales channels today, your organization is already behind the average B2B supplier. Forrester forecasts that, by 2027, US B2B digital sales will achieve a compound annual growth rate (CAGR) of 10.7% (compared to 0.5% CAGR for offline sales), [reaching \\$3 trillion](#). These data points paint a clear picture that B2B organizations must leverage digital routes to market to compete and win in today's selling landscape. Digital routes to market are now a key catalyst for B2B growth.

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Figure 2

Digital Routes To Market Drive Substantial B2B Sales Transactions And Revenue



1. Base: 4,765 purchase influencers who purchased a non-trial product or solution as a renewal or add-on; Source: Forrester's Buyers' Journey Survey, 2025

2. Base: 98 sales professionals whose role is a sales leader and responded; Source: Forrester B2B Sales Survey, 2024

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Multiple Forces Are Synergistically Powering Digital Sales Channel

Growth

B2B leaders must understand that the forces accelerating digital sales channel adoption and growth, for both direct and indirect routes to market, are essential to optimizing go-to-market strategy. Leaders must consider the following forces that are actively shaping B2B buying:

- **Digital-first experiences and younger buyers.** The most powerful force driving digital sales channel adoption is a fundamental shift in buyer demographics, preferences, and behavior. In Forrester's Buyers' Journey Survey, 2025, 68% of surveyed business buyers with purchases \$1 million or greater were Millennials or members of Generation Z. These buyers are digital natives and [strongly prefer digital self-service channels](#). For example, 49% of Millennial and Gen Z business buyers used a digital transaction method for their most recent initial purchase. B2B suppliers must offer [personalized](#), digital experiences or risk being eliminated for consideration when these buyers are drivers in the [buying group](#), especially as genAI reshapes the buying process.

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- **Cost efficiency and operational optimization.** Digital sales channels deliver measurable ROI not only by engaging buyers based on their preferences, but also by driving operational efficiencies. Automation of order pricing, invoicing, inventory management, and customer service eliminates manual processes and reduces errors. In addition, digital sales channels can reduce the overhead costs associated with sales teams, order operations, and the need for physical offices and storefronts.
- **Expansion into new markets.** Digital sales channels enable suppliers to expand into new markets faster and without the need for a physical presence. Industry/vertical marketplaces, such as Xometry for industrial buyers, can reduce customer acquisition costs for suppliers by targeting specialized audiences with high intent. Hyperscalers, such as Amazon Web Services (AWS) and Microsoft Azure, provide marketplaces that enable greater reach, efficiency, and scale for cloud solution providers along with robust support for enterprise procurement.
- **Technological advancements and the age of AI.** Initially propelled by high-speed internet connectivity and cloud computing, ongoing innovations are transforming how B2B buyers engage, evaluate, and transact through digital channels. Secure APIs and blockchain technology foster greater trust, making digital transactions more reliable and effective for buyers and suppliers. Video and interactive content, such as demos, can boost engagement and accelerate the buyer's journey. AI and machine learning are driving further changes, enabling hyperpersonalized content, predictive analytics, conversational interactions, automation, and dynamic pricing. Together, these advancements make digital sales channels more dynamic, accessible, secure, and efficient.
- **Increasing demand for data-driven decision-making.** Digital sales channels natively collect rich data on buyer behavior, preferences, and deal progress that traditional offline channels lack. Businesses can use this data to understand complex buying processes, predict client needs, and spot risks. AI can now support quickly analyzing this flood of information to find trends, predict problems like customer loss, and automate tasks. This data-driven insight empowers companies to make faster, smarter decisions and strengthen their competitive edge in a rapidly evolving marketplace.

Understanding The Range Of Digital Sales Channel Options

The digitalization of B2B sales has moved far beyond businesses just selling through their own websites. To thrive, suppliers must strategically navigate a variety of direct

and indirect digital sales channels so buyers can easily purchase online. Each channel has its own structure, advantages, and impact on supplier/buyer relationships.

Understanding these differences is the first step toward choosing the right combination of channels that balance control, cost, and market reach. Broadly, these channels are grouped into three categories, defined by who operates them (see Figure 3).

Category 1: Buyer-Operated Channels

In this model, the organizational buyer operates a digital purchasing tool called an e-procurement system. These systems are used by large organizations and governments to manage their sourcing, contracting, and purchasing. Unlike public online stores, they operate private, permission-based networks where buyers within the organization transact with preapproved suppliers. Their main advantage is automating and standardizing purchasing workflows, reducing processing times, and ensuring contract compliance for both buyers and suppliers. For suppliers, while they can be operationally complex, these systems provide predictable, high-volume orders from established customers. An example is SAP Ariba, used primarily by major global enterprises such as Walmart and UnitedHealth Group. Another example is Coupa Procurement, which is widely used by mid-to-large enterprises prioritizing real-time spend visibility, such as NVIDIA and Schneider Electric.

Category 2: Supplier-Operated Channels

This category encompasses digital sales channels owned and controlled by a supplier, designed to acquire and sell to buyers directly. Their key advantage is that they allow the supplier to maintain full control over product assortment, branding, user experience, pricing, customer data, analytics and insights, as well as the transaction process.

- **Supplier-operated e-commerce.** Suppliers manage this channel primarily to sell their own products or services directly to business buyers (but sometimes offering limited third-party items for convenience). Once simple online catalogs, they have become advanced customer engagement hubs that provide personalized and automated self-service purchasing. For large enterprises, a key advantage is their ability to integrate with buyer procurement systems through punch-out catalogs, enabling real-time product selection and seamless ordering. For example, Xerox sells its printers on its platform and connects its catalog (Xerox Elite eCommerce) directly to buyers' e-procurement systems.
- **Supplier-operated horizontal marketplaces.** These systems cater to a broad range of business needs across multiple unrelated industries. They attract a large

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audience by offering everything from office supplies to industrial equipment in one place. Suppliers operate in a highly competitive environment but benefit from high traffic and streamlined logistics. The most recognized example is Amazon Business, which combines its own branded products with a wide range of third-party offerings tailored specially for businesses. This gives corporate buyers a convenient one-stop-shopping experience, compared to specialized marketplaces.

- **Supplier-operated industry/vertical marketplaces.** This type of digital sales channel specializes in a single industry, offering deep expertise and highly specialized products or services. They attract a targeted audience of professional buyers looking for specific solutions. This focused environment allows for higher value transactions and more relevant demand generation. An example is Honeywell's GoDirect Trade for the aerospace industry. They provide FAA-compliant documentation, maintenance history, and provenance tracked via blockchain on each part listing to reduce fraud.
- **Supplier-operated product/service marketplaces.** These marketplaces focus on a single category of product or service, while serving buyers across many different industries, rather than just one. This high level of specialization attracts a highly targeted, motivated, and knowledgeable buyer community. For suppliers, it offers access to concentrated demand within a narrow market, making it especially suitable for custom and highly technical offerings. For example, Protolabs operates a marketplace for custom manufacturing services, offering instant quoting and design analysis for 3D printing, CNC machining, and injection molding, which helps engineers reduce prototyping time while maintaining quality standards.

Category 3: Third-Party-Operated Channels

This category consists of digital sales channels provided by an operator not exclusively focused on selling their own offerings. As such, all subcategories under this umbrella are focused on selling third-party offerings, making them all marketplaces. Under this model, the operator typically provides the underlying technology, governance, and often value-added services (e.g., payments, logistics) in exchange for a fee (commission or subscription).

- **Third-party-operated horizontal marketplaces.** These channels connect countless buyers and sellers across diverse, unrelated industries. Unlike a supplier-operated horizontal site, like Amazon Business, which may be biased toward its own branded products, this model aggregates just third-party vendor offerings. Its core value is convenience and selection for buyers. For suppliers, it

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provides reach without the expense and complexity of maintaining their own system. An example is Alibaba.com which connects global manufacturers with wholesale buyers across 200-plus countries. While suppliers pay a commission (typically around 15%), they gain exposure to millions of potential customers they couldn't reach independently or at an extremely high cost in doing so.

- **Third-party-operated industry/vertical marketplaces.** These marketplaces specialize in a specific industry/vertical, offering deep expertise, specialized product or services, and industry-specific functionality. This allows suppliers targeted access to a high-intent audience of professional buyers, reducing customer acquisition costs, and lending immediate credibility. Xometry, for example, is a global industrial marketplace. By focusing exclusively on the industrial space, they connect suppliers with industrial buyers who are more likely to purchase compared to general horizontal marketplaces. In 2024, they connected 4,375 suppliers of industrial products with 68,227 industrial buyers.
- **Third-party-operated product/service category marketplaces.** Like their supplier-operated peers, these marketplaces aggregate demand from a highly targeted, prequalified audience actively searching for that specific product or service category. The difference is that the third-party operator shoulders the burden of payment processing, security, and often fulfilment. For buyers, the key advantage is choice and comparison, allowing them to evaluate numerous suppliers, prices, and review in a single efficient visit. Examples include Quartzy for lab supplies and Reibus for industrial metals.
- **Third-party-operated one-tier cloud marketplaces.** This is a rapidly growing channel where software-as-a-service (SaaS) and data products are sold through the platforms of independent software vendors (ISVs), like Salesforce AppExchange and major cloud service providers or hyperscalers (e.g., AWS, Microsoft Azure, Google Cloud). Unlike other marketplaces, their offerings are tightly integrated with the provider's infrastructure, enabling seamless procurement, unified billing, and one-click deployment. Buyers also benefit from streamlined compliance, security, and centralized management. Suppliers/ISVs gain access to highly qualified enterprise buyers, leverage buyers' committed cloud spend (customers can use their pre-negotiated cloud budgets), improve operational efficiency, and expand reach through cosell and comarketing programs.
- **Third-party-operated two-tier cloud marketplaces.** This channel involves distributors, like Ingram Micro Cloud and Pax8, connecting suppliers (cloud service providers/ISVs) with partners, who then sell to end customers. These distributors expand the suppliers' market reach and handle billing, support, and compliance,

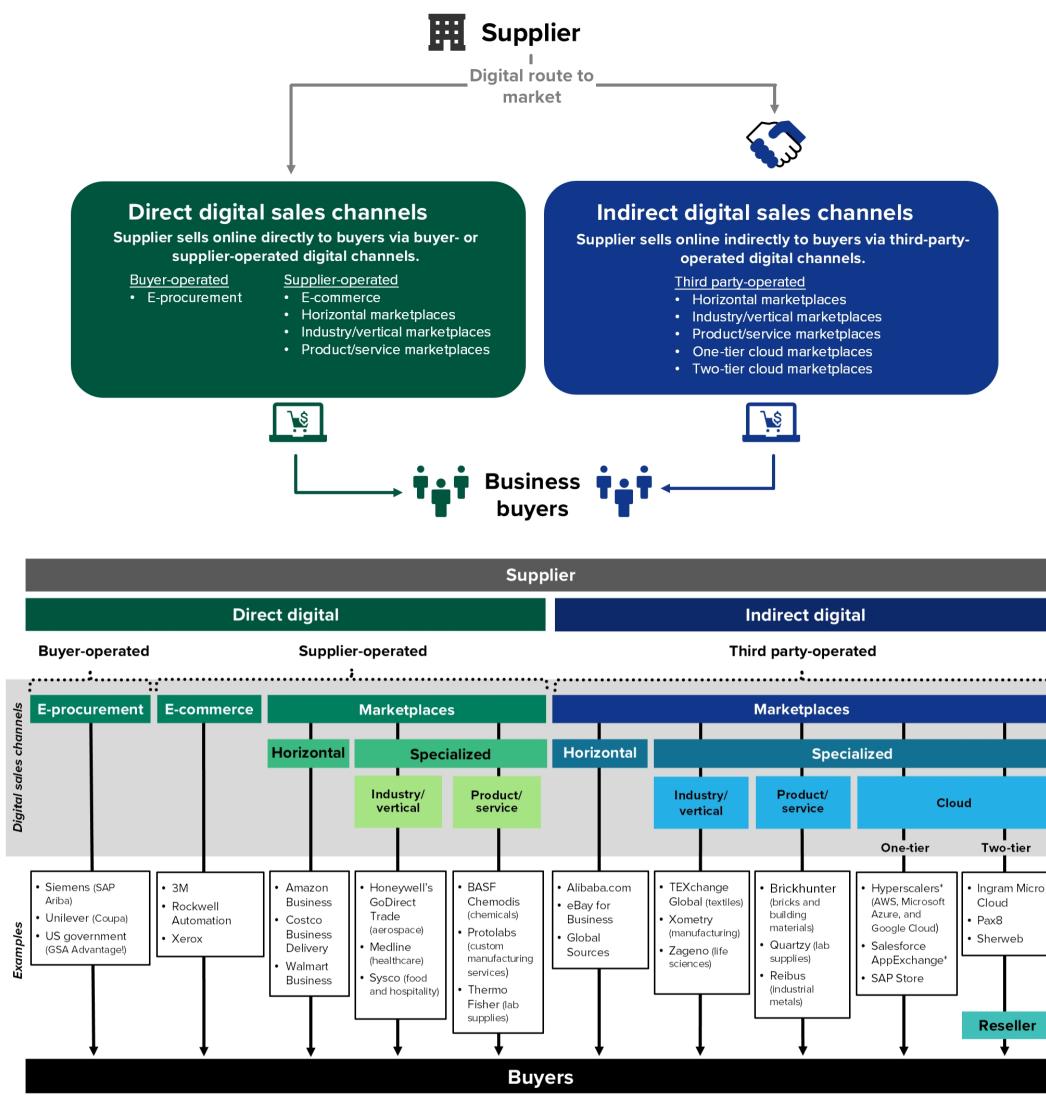
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making it easier for suppliers to sell. Partners gain access to cloud solutions and support, such as training and marketing. Overall, this two-tier model fosters fast adoption of cloud services while creating new revenue opportunities for all parties involved.

Figure 3

The 10 Most Common B2B Digital Sales Channels



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