

# Takeaways from our Live Session on Amazon's 4Q23 Results for Retail Leaders

By Claire McBride // February 2, 2024 // Forecasts, Research, Webinars

Stratably went live today to delve deep into Amazon's 4th Quarter 2023 earnings report, helping retail leaders understand the implications for Amazon, the broader retail market, and the eCommerce industry as a whole.

This session complemented our written recap (linked below) published yesterday evening after Amazon reported its results.

## Key topics from the session:

1. How growth shakes out across Amazon's business segments and compared to its competitors:
  - 1P vs. 3P
  - North America vs. International
  - Retail vs. the total retail market
  - Amazon Ads vs. search, social, and retail media peers
2. A look into Amazon's recovering profitability – and what it means for brands:
  - Profitability by business unit
  - How shipping costs, shipping speed, and GMV are all working together
3. 2024 outlook to inform your own forecasting:
  - Global GMV projections
  - Benchmarking data on the promotional landscape
  - Expectations for Amazon Ads spend
  - How continued profitability improvement will impact brands' businesses

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