

State of Ecommerce Search and Product Discovery 2024

Exploring and Embracing Change



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About the Survey

Are today's ecommerce search and product discovery experiences meeting shoppers' needs? How easily can shoppers find the best items for them? Are retailers maximizing opportunities to engage their shoppers: creating memorable experiences that build loyalty, set their brand apart, and drive conversions?

To answer questions like these, Constructor surveyed 896 online shoppers across the United States and United Kingdom — with 585 respondents from the US and 311 from the UK.

Questions focused on various aspects of consumers' online shopping experiences — including how shoppers search and browse for products on ecommerce sites and apps (excluding Amazon), as well as shoppers' familiarity and comfort with various technologies. Respondents ranged in age (18–60+) and household income. The online survey was conducted in June 2024.



Executive Summary

It's an exciting time to be involved in ecommerce search and product discovery.

In recent years, rapid and significant changes have left indelible marks across many areas of retail. Now, search and product discovery — that is, how online shoppers find the items they need and love — is on the cusp of a defining and transformative moment, too.

A number of factors are driving that change as consumer expectations, competitive imperatives, and technology innovations converge to reshape the bounds of what's possible. Amidst greater ideation and experimentation, it was an apt time to undertake our State of Ecommerce Search and Product Discovery 2024 study.

This year's report — compiling data from nearly 900 shoppers across the US and UK — explores what online shoppers want when they search and browse on ecommerce sites (excluding Amazon); how well retailers live up to those expectations; and what opportunities exist to foster even better, mutually beneficial interactions.

As our second annual study, the report also offers interesting points of comparison with last year's data.

The message from shoppers in 2024 is clear and two-fold:

First, there's work to be done in ecommerce search and product discovery. More than 4 in 10 shoppers (42%) give the experiences retailers deliver a "C" grade or below.

In particular, ecommerce search needs an upgrade, according to 68% of shoppers. This is more pronounced in the US (71%) than UK (61%). It's also a marked increase since last year (60%), likely reflecting higher expectations and — as tech advances illustrate what's possible — rising dissatisfaction with the status quo.

Secondly, and accordingly, it's time to explore and embrace change. For retailers, a steadfast commitment to the customer experience often actually means being open to shaking things up.

The time is ripe to do so, especially as AI and generative AI technologies enhance and democratize digital experience delivery. More so than last year, shoppers are familiar with generative AI and increasingly receptive to using it across multiple areas of ecommerce.

Shoppers also are clear about what "better" looks like for search and product discovery, including: personalized journeys, tightly integrated online and in-store experiences, search results that match intent, and the ability for shoppers to search like they speak (in natural language and complete sentences).

Where current paradigms fall short, consumers are open to something new. For example, when they're not exactly sure what to buy, 61% say they'd "definitely" or "probably" be willing to get help from an AI assistant.

If you build it, will they (all) come?

Retailers have an opportunity to shape and be part of the next phase of product discovery: creating disruptive experiences that engage shoppers in new ways. Know that not everything will stick, and wide-scale adoption won't happen immediately. What's more, data reveals a generational divide, with shoppers below 60 (especially those 18–29) more willing and eager to experiment. But with an eye on “what's next,” retailers can turn early adopters into evangelists and tie their brand to the wave of the future.

They face the need to drive improvements now. Unfruitful and generic experiences don't just irk shoppers; data shows they're detrimental to retailers too, while high-quality product discovery increases conversions, average order value, loyalty, and more.

So, as shoppers explore, embrace, and spur change, resilient retailers need to be ready to do the same.

No time to dig into the details? [Jump to page 34](#) for a recap of top findings.



Subject Matter Experts

We asked the following experts to give their take on the survey data that follows — what it means to them, and what it may mean to your retail organization.



Kelly Goetsch

Chief Strategy Officer
commercetools



Tovi Heilbronn

Senior Director of
Technology Strategy
Apply Digital



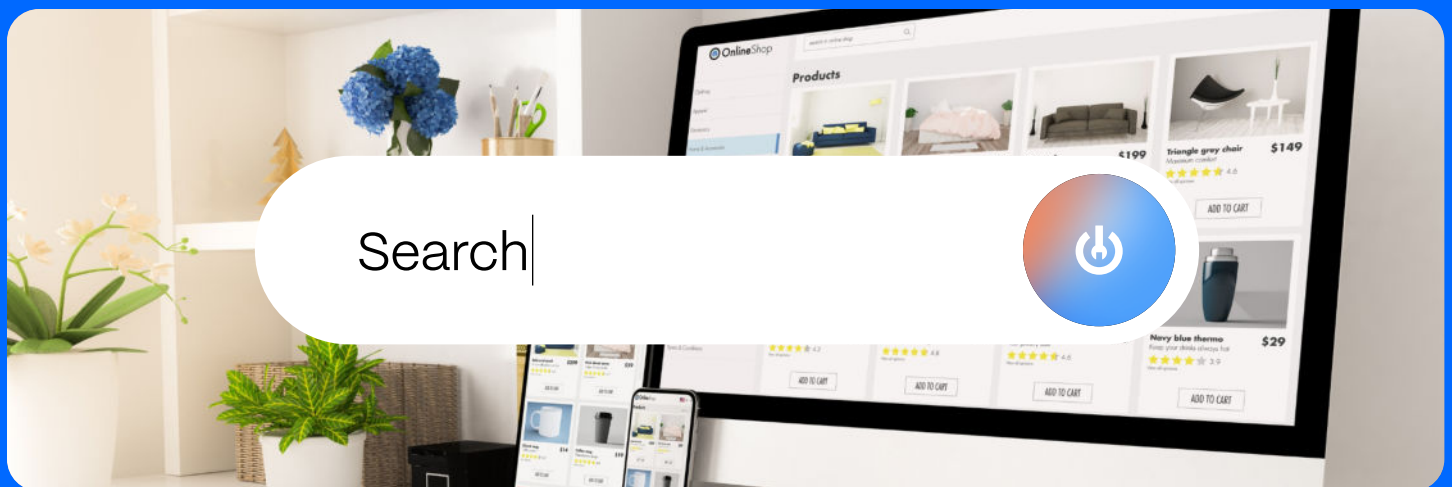
Becky Parisotto

Vice President of Commerce
& Retail Platforms
Orium



Search and Product Discovery: Struggles to 'Make the Grade'

When it comes to crafting compelling search and product discovery experiences, retailers don't always "make the grade." More than 4 in 10 shoppers (42%) in the US and UK say the search and product discovery experiences on retail sites merit a "C" grade or below.



Among the hindrances consumers face:

- Limited search functionality
- Time-consuming searches
- Humdrum product discovery experiences
- A lack of personalization. (Despite their purchase history, 44% of shoppers say that — time and time again — their favorite retail site treats them like a total stranger.)

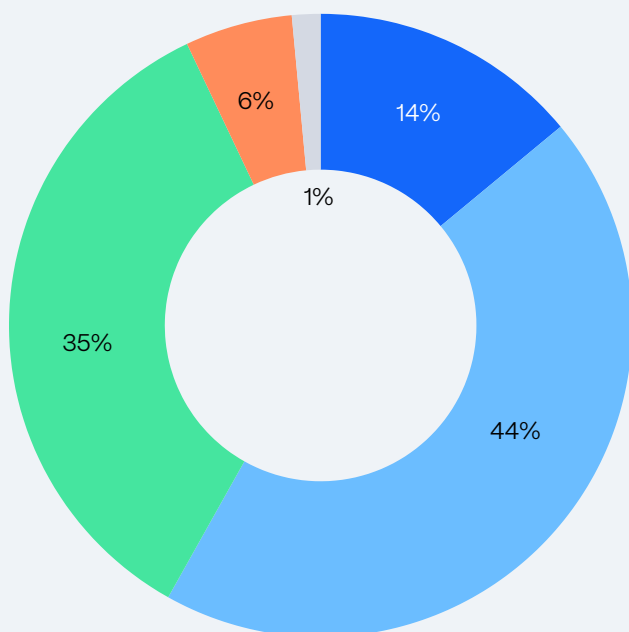
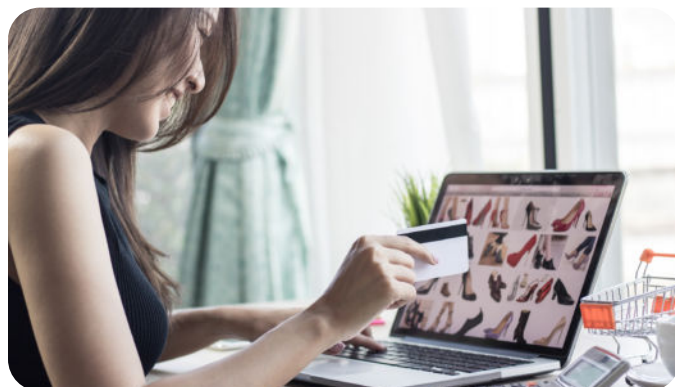
To earn higher marks — and reap the loyalty and revenue benefits that come with them — retailers are well-served by addressing the pain points outlined in this chapter.

Seeking 'Grade A' product discovery experiences

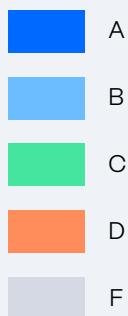
An estimated [2.71 billion people](#) shop online nowadays; that's roughly a third of the world's population. With such heavy ecommerce activity, it behooves retailers to make their digital experiences stand out: enabling shoppers to find the products they're seeking — and discover new and attractive ones with ease — to improve the pathway to purchase.

How well are retailers doing? Shoppers doled out the grades and found there's room for improvement. Only 14% of consumers rated retailers' search and product discovery experiences an "A," while more than 4 in 10 (42%) graded them a "C" or below.

Sounds like it may be time to "hit the books": examining what'll make shoppers' experiences smoother and better, why that benefits retailers too, and how to get there.



What average grade would you give the last 5 retailers you shopped with, when it comes to enabling you to find/discover the best products for you on their websites?



n=879

Searching for... better search experiences

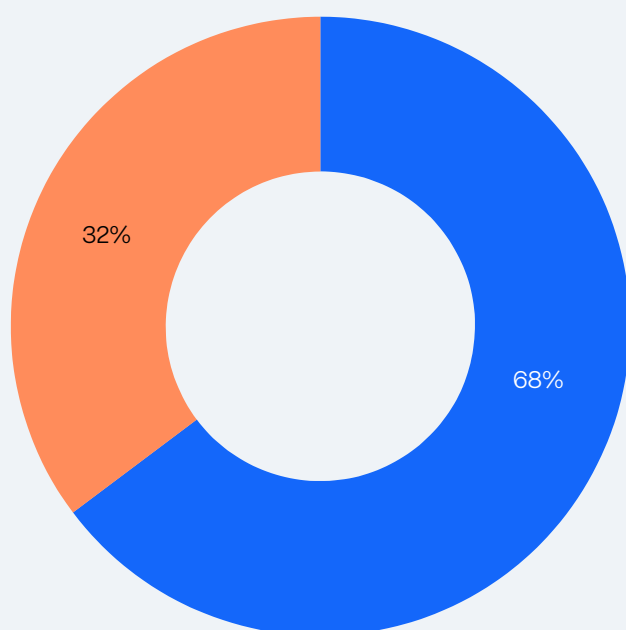
Wading through pages and pages of loosely relevant search results? Or getting the dreaded “no results found” message (even though a retailer definitely carries the item)? Can’t get the search engine to understand your query? Does poor (or no) filtering functionality inhibit narrowing results? Put yourself in customers’ shoes... we’ve all been there!

For reasons like these and more, **nearly 7 in 10 shoppers (68%) think that ecommerce search is due for an upgrade.**

This sentiment is especially pronounced among US shoppers (71%) compared to those in the UK (61%). **It’s also an increase since last year (60%).** As more consumers see examples of excellence

and are exposed to what’s possible, it’s likely their patience for experiences they deem subpar is waning.

The good news for retailers is that, as cost and technology barriers drop, addressing the situations above — driving notable improvements to product discovery — is well within reach.



Do you feel the search function on retailers' websites generally needs an upgrade?



n=884

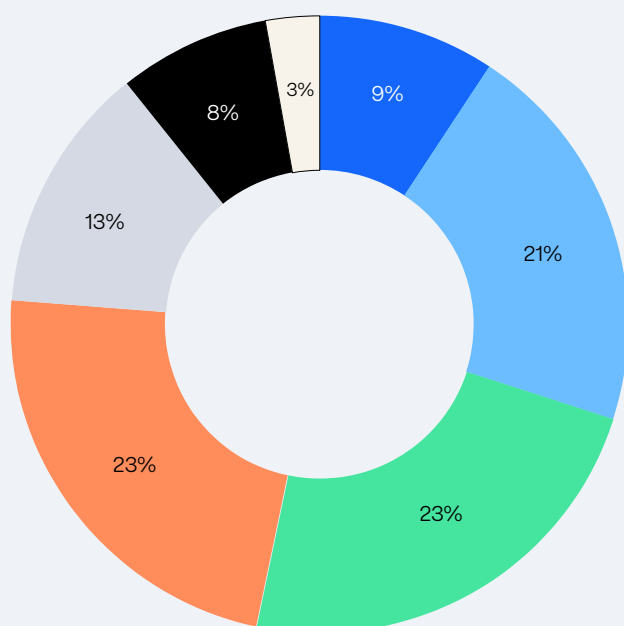
Eating up time?

No aisles to walk down. No endcaps beckoning. No need to trek from one end of a store to the other and back again. When searching for products online, consumers often expect fast experiences — so they can find what they need and get on with their days.



Today's ecommerce experiences don't always deliver, though.

For 44% of shoppers (41% in the US and 49% in the UK), **it takes at least 3 minutes to wade through results** to find the product they're after. Meanwhile, more than 1 in 5 shoppers (21%) say it takes at least 8 minutes (this excludes the percentage that don't find what they're seeking).



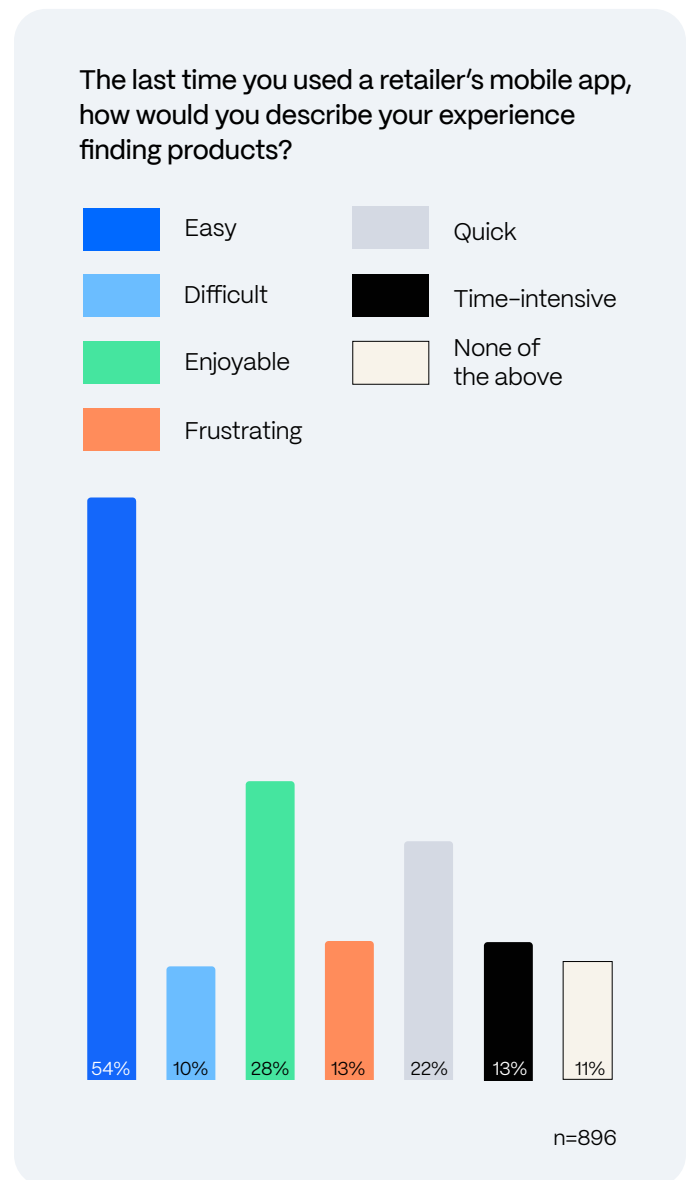
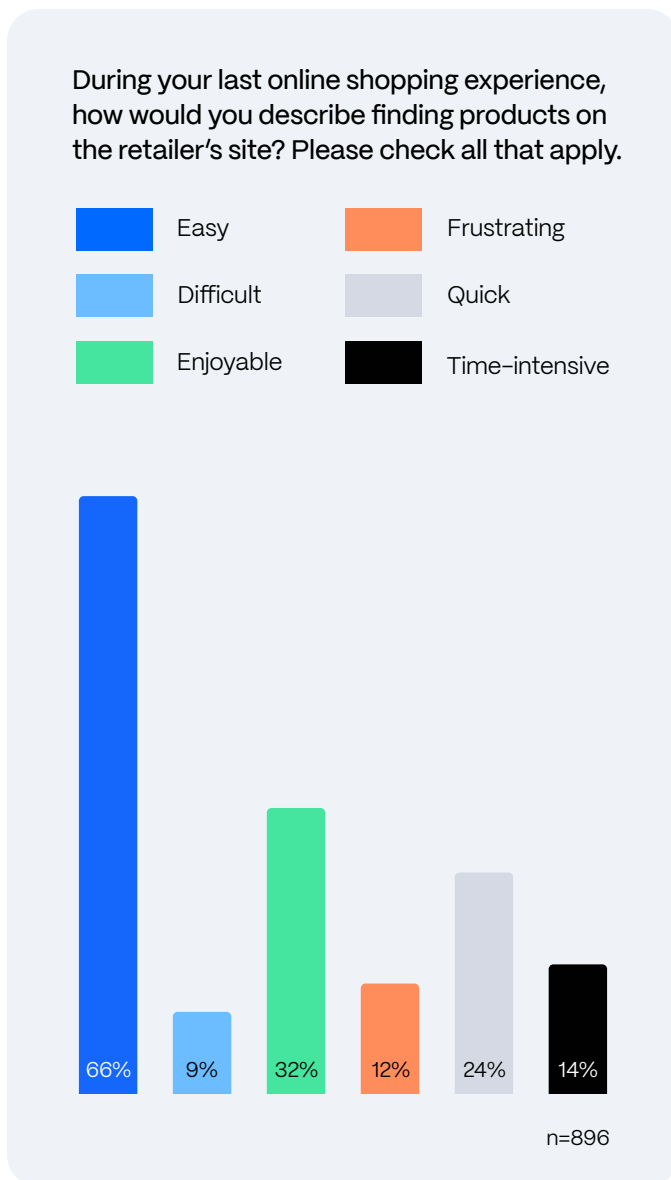
During your last online shopping experience where you used the retailer's search bar, how long did it take you to find what you needed?



n=884

It may come as little surprise, then, that only a quarter of online shoppers (24%) describe their experiences finding products on retail websites as "quick." And while 66% call their experiences "easy," that's not the same as engaging — with just over 3 in 10 (32%) saying product discovery on retail websites is "enjoyable" for them.

Shoppers using retailers' mobile apps feel similarly: 22% call product discovery there "quick" and 28% say it's "enjoyable."



This all highlights a major opportunity retailers have to differentiate themselves — creating attractive, interactive, and useful digital experiences that

catch shoppers' eyes, make them want to engage, and — importantly — guide them to purchase.

So, what's taking so long? (And why don't you get me?)

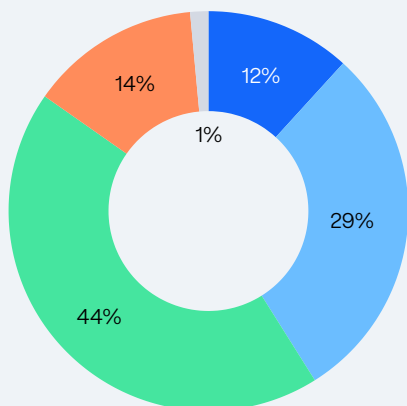
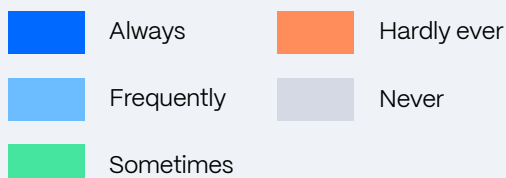
In fact, more than 8 in 10 shoppers (85%) say they have to reformulate their search queries at least "sometimes" so retail websites better understand what they mean. Four in 10 (41%) find themselves "frequently" or "always" needing to rephrase their queries. Only 1% of shoppers say that search engines always understand them.

Today, the onus is largely on shoppers to rethink keywords, correct their typos, and phrase their queries in a more digestible and condensed way — a pain point for consumers.

When search isn't speedy, what's the hold-up? As online shoppers look for the right products for them, sometimes there's a disconnect between what they want to express and what the search engine understands.

However, as advanced AI — including natural language processing (NLP) and forms of generative AI — becomes more deeply embedded in search experiences, ecommerce search will also become more flexible and able to successfully interpret a wide range of inputs. These enhanced experiences will benefit shoppers and retailers alike.

How frequently do you have to edit your queries so retail websites better understand you and show the items you're searching for?



n=896

“Human communication is ever-evolving, and often, there is a lack of shared language between how a shopper describes their needs, and the words a retailer uses internally to define their products. Smart businesses are closing this gap by leveraging large language models and generative AI to continuously improve their product descriptions based on first-party search data and third-party trends. This helps with making search intuitive and responsive — ensuring better results.”

— **Tovi Heilbronn**, Senior Director of Technology Strategy, Apply Digital

Seems like there's a mismatch

Here's something else that can eat up shoppers' time: More than two-thirds of consumers (68%) say when they shop online, the results don't quite line up with what they're looking for.

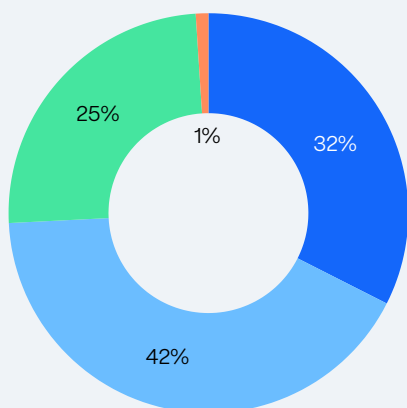
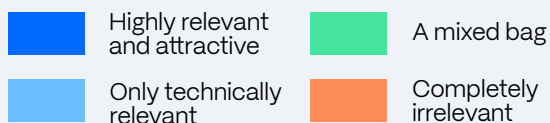
For example, a shopper might search for "hoodie," and although hoodies get shown to them, they're not in the styles, colors, brands, size, etc. the shopper is interested in — necessitating further research or driving shoppers elsewhere.

Four in 10 shoppers (42%) experience the situation above: where results shown only are technically relevant to their query (e.g., "Yes, you're showing me hoodies... but not the types of hoodies I'd

like to see."). This is a bigger pain point in the UK (48%) than US (38%). It's also actually an increase since last year (33%) — perhaps indicating greater awareness of, and frustration with, this issue.

In addition, this year, a quarter of shoppers (25%) note that for them, search results are a "mixed bag": that is, sometimes relevant to their query and sometimes totally missing the mark.

The last time you used the search bar on a retail website, how would you describe the results shown to you?



n=884

"We are receiving an increasing number of requests from retailers for our help in making product search results and experiences more attractive and meaningful to shoppers. Constant development in search and product discovery — from tapping on-site "clickstream" (behavioral) data to leveraging AI in new ways — is serving this growing need."

— **Becky Parisotto**, Vice President of Commerce & Retail Platforms, Orium

Have we ever met?

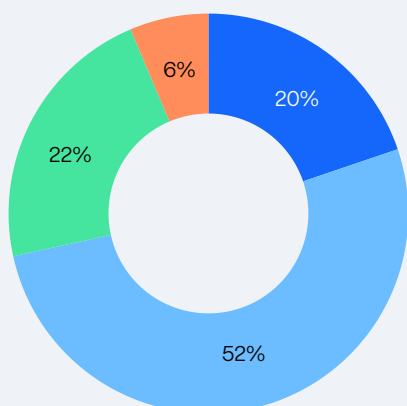
The data also shows a pervasive lack of personalization across the shopper journey — often an impediment when shoppers try to find what they want. With diverse customer bases and customers with wide-ranging needs, retailers often find that one-size-fits-all digital experiences tend to be a dubious fit at best.

Thinking about the online retailer they most recently engaged with, only 20% of shoppers noted that experiences there are “frequently” personalized to their needs. Similar to last year, just over 1 in 5 (22%) say their experiences with that retailer are not personalized at all.

Many shoppers fall in the middle: 52% (47% US, 61% UK) say search and browse experiences with the retailer they most recently shopped with are “sometimes” personalized.

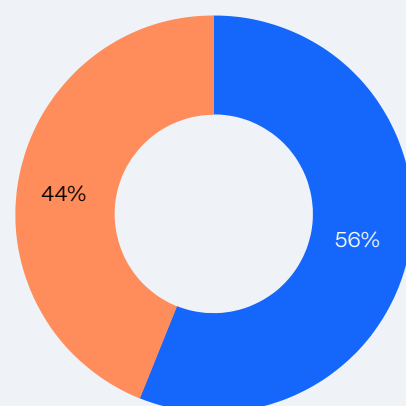
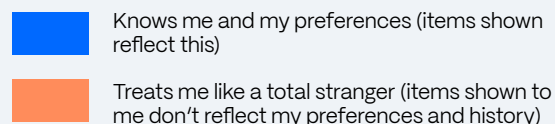
And while shoppers certainly know who their favorite retailer is, that brand often gives them the virtual equivalent of a blank stare. Despite their engagement and purchase history, more than 4 in 10 shoppers (44%) say when they shop on their favorite retailer’s website, they’re treated like a total stranger — with no acknowledgement of their preferences, history, and prior purchases reflected in the digital experiences. This is felt more strongly in the US (49%) than UK (34%).

When you use the search bar or browse category pages on a retailer’s site, do you feel like the results are personalized to you?



n=879

Please complete the sentence. When I shop on my favorite retailer’s site, the site...



n=879

Because these retailers hold an important status — consumers call them their favorite — there's an opportunity to engage VIP shoppers further. Retailers likely have amassed important digital clues and breadcrumbs about their frequent shoppers: what they like and dislike, what

motivates them to purchase (e.g., discounts, holidays, etc.), favorite brands and styles, preferred channel for engagement, and so on. Using this data effectively to hone communications and promotions can boost customer satisfaction, along with customer lifetime value.



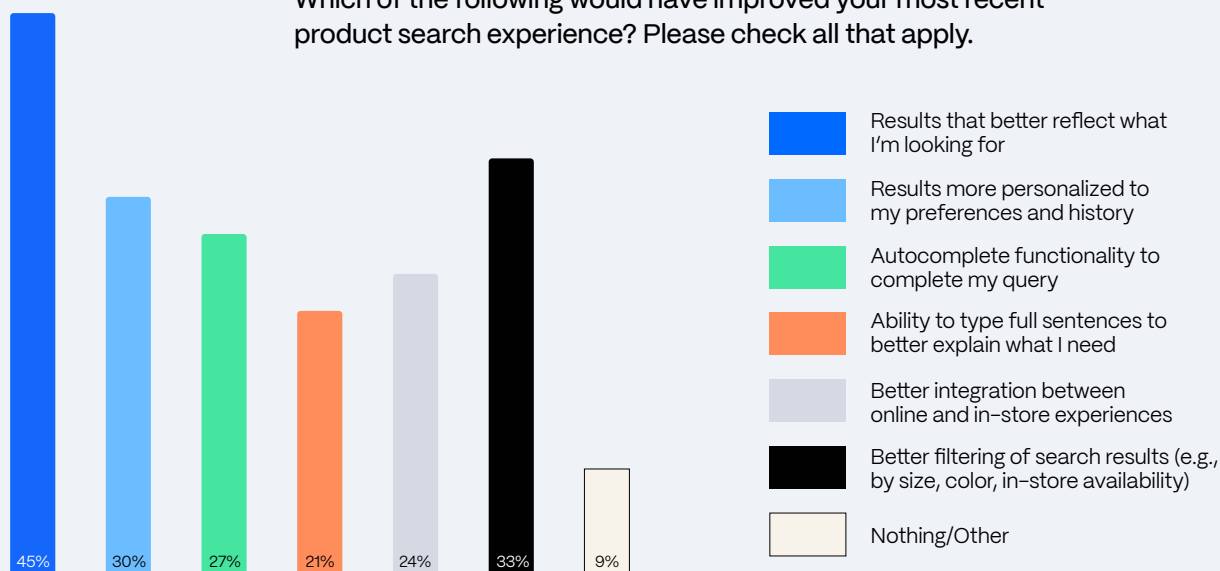
Shoppers' wishlists to improve search and product discovery

What would ease shoppers' pain points, make it easier to find products, and drive better digital experiences? Savvy retailers want to know, and shoppers have some thoughts.

Reflecting on their most recent search experiences, nearly half of shoppers (45%) wish for results that better reflect what they're looking for. Shoppers also express a preference for better filtering in search results (33%) and personalization of results (30%) and personalization of results (30% — though only 18% of those over 60).

Other items on shoppers' wishlists include better integration of online and in-store experiences (24%) — a bigger priority in the US (28%) than UK (16%) — and the ability to type full sentences in search to better explain what they need (21%).

Which of the following would have improved your most recent product search experience? Please check all that apply.



n=884

“Shoppers don’t enjoy repetitive behavior, and for most, the fun of shopping lies in discovery and exploration. Anything that a brand can do to get them to the discovery stage quicker is always appreciated. In proof-of-concept testing conducted by a major North American retailer, shoppers responded very positively to having the ability to filter product results pages with a single click, based on their saved preferences (e.g., filter by size, brand, color, etc.). Retailers can capitalize on shoppers’ desires — and by gating and requiring a log-in for features like ‘saved searches,’ they can gain valuable first-party data to further improve customer experiences.”

— Tovi Heilbronn, Senior Director of Technology Strategy, Apply Digital

Time for a Change

For most consumers, the amount of time and money they spend shopping online hasn't dropped over the past year; in fact, data shows many are spending more. So, retailers who get search and product discovery right have an opportunity to capture both mindshare and wallet share — creating sticky experiences that make their brand a destination of choice.



They have a clear map of what's needed, as consumers lay out points of friction in search and product discovery, as well as their wishlists for better digital experiences.

It behooves retailers to take this feedback to heart. The data in this chapter shows what happens when shoppers find themselves thwarted and dissatisfied: They tend to bounce and make their purchase at a different retailer, among other ramifications.

Conversely, when retailers invest in better search and product discovery, it's a win-win for them and their shoppers. When shoppers can easily

find items that appeal to them, this increases their likelihood to purchase, loyalty/customer lifetime value, likelihood to recommend the brand, and more. Roughly a quarter of shoppers (24% — up from 15% last year) say that if they were guaranteed an excellent search and product discovery experience, they'd be willing to pay 5–10% more for the item they're seeking.

Since excellent product discovery literally pays off, it's important for retailers to take stock of where they're serving shoppers well and where they may need to drive change.

Consumer spending: still going strong

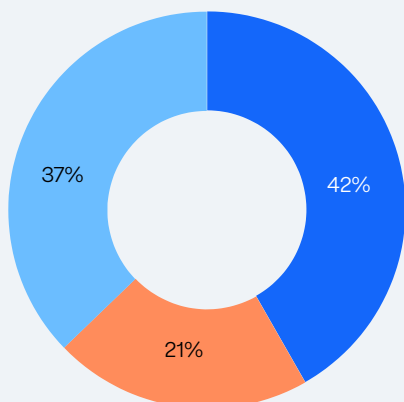
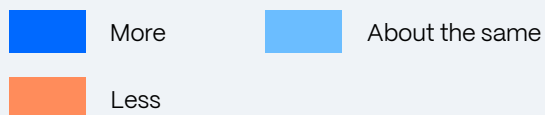
With the feedback, data, and technology available to them, retailers today have a unique opportunity to better engage consumers — many of whom continue spending money and time on ecommerce sites.

Nearly 8 in 10 shoppers (79%) say they're spending more or the same amount of money on online shopping, compared to a year ago. While down from 86% who said this last year, this data still indicates heavy activity worth capitalizing on.

In addition, 83% of consumers say they're spending more or the same amount of time on online shopping compared to a year ago.

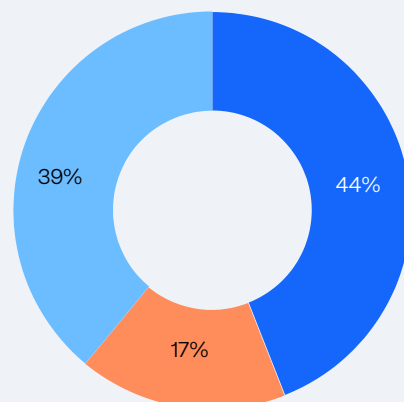
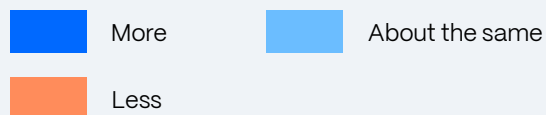


In total, would you estimate you're spending more or less money on online shopping than you were a year ago?



n=879

In total, would you estimate you're spending more or less time on online shopping than you were a year ago?



n=879

The ramifications of poor experiences

Cumbersome, generic, unproductive experiences aren't just a turnoff for shoppers — the impact reverberates and affects retailers, too.

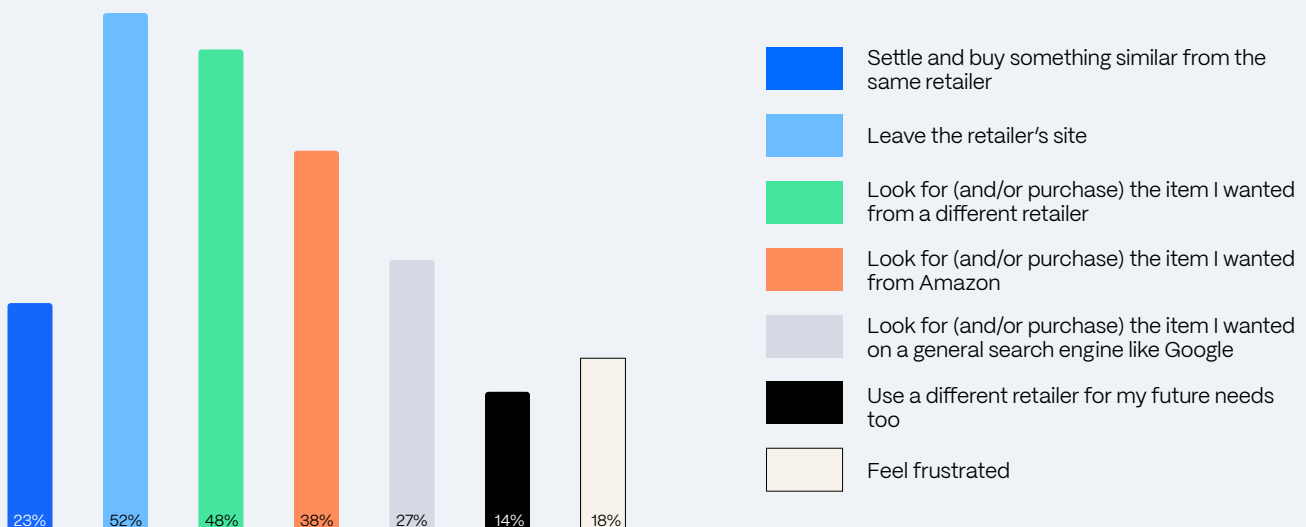


When retailers fail to empower and enable their shoppers to find appealing items, shoppers are more likely to bounce (52%), abandoning that journey with the retailer. This is more pronounced in the US (56%) than UK (44%).

They're also inclined to take their wallets elsewhere — buying the item from a different retailer (48%), such as through Amazon (38%) or Google (27%).

And after an unsuccessful product discovery experience, nearly 1 in 5 shoppers (18%) feel frustrated with that experience and the brand, and 14% vow to use a different retailer for future needs.

Complete the sentence, and check all that apply. When I shop on a retailer's site and can't find what I need, I usually...



n=879

Great experiences pay off

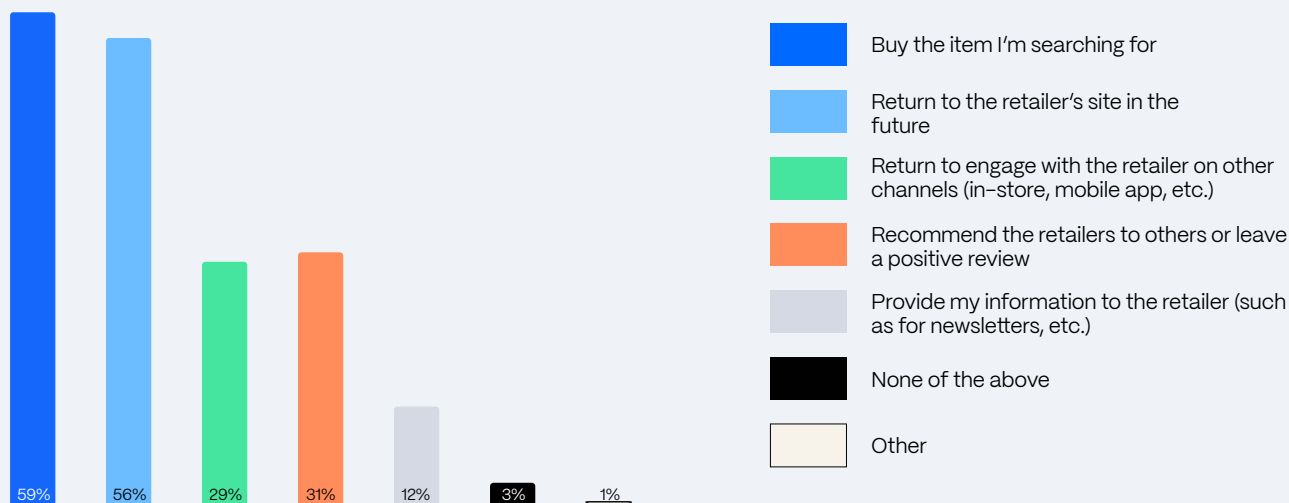
Conversely, excellent search and product discovery experiences literally pay off. They're a win-win for consumers and retailers alike: Shoppers find the item(s) they want and need, and retailers often benefit from making a sale, among other positive impacts to the business.

Shoppers note that when they're easily able to find products they need and that appeal to them, they're more likely to:

- Buy the item they're searching for — Nearly 6 in 10 (59%)
- Return to that retailer's site in the future — 56%
- Recommend the retailer/leave a positive review — 31%
- Engage across the retailer's other channels — 29%



Complete the sentence, and check all that apply. When I am easily able to find the product I need on a retailer's site, I am more likely to...



n=879

The data also highlights why it's critical for retailers to associate their brands with superior search and product discovery. Shoppers say if they knew excellent experiences were a "given" at a retailer, they'd be more likely to:

- Shop more at that retailer — 62%
- Choose that retailer first for their shopping needs — 42% (This felt more strongly in the US at 46% than UK at 34%.)
- Leave a positive review — 41%
- Pay 5-10% more for the item(s) they're searching for — 24% (That's up from 15% last year!)



Mobile matters

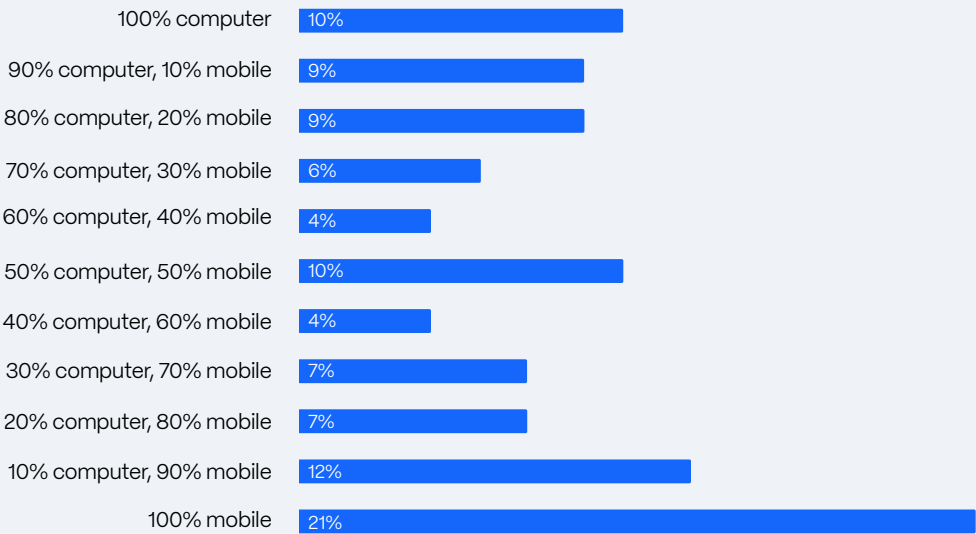
With consumers increasingly on-the-go and untethered, a good digital experience doesn't mean one that's just available on the computer: Mobile matters too... and it matters a lot. Retailers certainly know this, and typically prioritize and test their digital experiences across platforms and device types. By aiding shoppers in product discovery — no matter what device they're on — retailers can create cohesive experiences that drive many of the aforementioned benefits.

To better gauge the prevalence of (and preferences for) mobile shopping, we asked consumers how they divide their online shopping time between their computer and mobile device(s).

Data illustrates why mobile is such a key channel in retailers' omnichannel ecosystem: More than 6 in 10 shoppers (61%) do at least half their online shopping from their mobile devices. What's more, 1 in 5 (21%) do all their online shopping via mobile. This is slightly more pronounced in the UK (24%) than US (20%).

Shoppers over 60 years old were just as likely as other age groups to exclusively shop online via mobile (also 21%). However, the 60+ age group was also far more likely than others to do all their online shopping at their computer (30%). In contrast, only 4% of those 18–29, 3% of those 30–44, and 10% of those 45–60 do all their online shopping from their computer.

When you shop for items online, approximately what percent of time do you use your computer (laptop/desktop) vs. your mobile device (phone/tablet)?



*Totals do not reach 100% due to rounding. n=896

A Promising and Tech-Enabled Future

As retailers look to meet shoppers' expectations and use product discovery to support business goals, it's a great time to leverage technology to do so. Not only are technology advancements increasingly accessible, but consumers also show an appetite for engaging with them.



To that end, shoppers today are increasingly familiar with ChatGPT and other forms of generative AI (GenAI). As they use these technologies in their personal lives, they're increasingly receptive to using them to make product discovery easier too. More than half (52%) say that as they seek out the best products for them, they'd be "very" or "somewhat" comfortable using GenAI tools on an ecommerce site to help: a 10% jump over last year.

It's likely comfort levels will further increase, both as GenAI further penetrates consumers' lives

and as retailers demonstrate their commitment to using the technology responsibly, in a way that yields measurable value. On the whole, shoppers express strong desires for retailers to be transparent about when and how they're using GenAI.

What's more, as retailers and their technology providers continue to explore how GenAI can enhance and transform product discovery, shoppers also shared use cases that pique their interest.

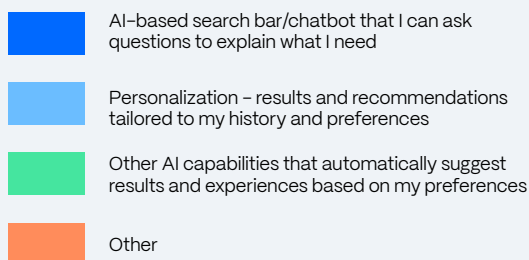
Tapping into technology

As retailers continue their digital transformation journeys, AI-based technologies — including generative AI (GenAI) — can drive important improvements to online shopping experiences.

Shoppers concur. As ecommerce sales grow and shoppers spend more time online, they're interested in having their digital experiences be even better. To that end, 62% of shoppers think personalization would improve search and product discovery. The appetite for personalization varied somewhat among age groups (e.g., 50% interested among those 60+, compared to 70% interested among those 18–29).

More than 4 in 10 shoppers (42%) think an AI-based search bar or chatbot would be an asset to them (32% among those 60+), and 22% expressed interest in other/additional AI that could cater experiences based on shopper preferences.

Would you be interested in any of the following innovations to improve your search and product discovery experiences? Please check all that apply.



n=869

“Embracing AI technologies is no longer optional but essential for businesses. Consumers want and expect deeply personalized shopping experiences, and this is where AI can really have an impact. By leveraging AI in a composable commerce tech stack, businesses can be more innovative and transform their customer interactions — leveraging data-driven insights and improving the quality of support their teams can provide to clients.”

— Kelly Goetsch,
Chief Strategy Officer, commercetools

GenAI: Achieving general awareness

Those working in ecommerce have likely heard about and been exposed to GenAI — as hype, news, and experimentation around the technology continue to abound. Ecommerce businesses continue to investigate and implement the technology across their operations: in customer support, content generation, inventory management, workflow optimization, product discovery, and a lot more.

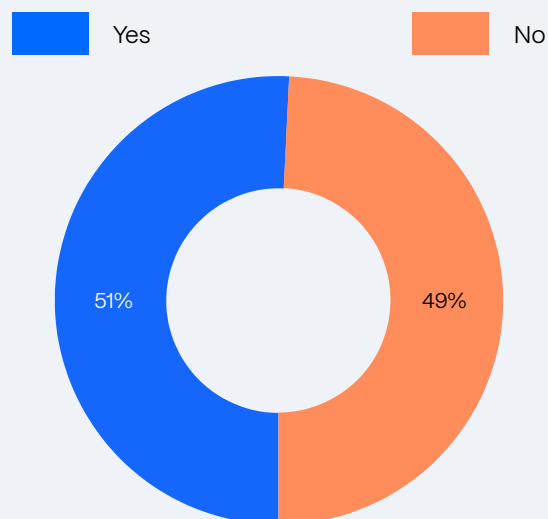


But it's not just the business world that's adopted GenAI. Consumers are familiar with it too, often in the form of ChatGPT and other conversational AI tools like Bing Chat and Google Bard. And they're not just aware of what GenAI is; they're increasingly using it across their daily lives. In fact, 51% of shoppers — up from 29% last year — say they've used these types of GenAI tools.

A divide does exist among age groups: Among those over 60, only 26% have tried conversational GenAI tools. Those 18–29 years old have the highest rate of usage (64%).

As the technology becomes even more prevalent and consumers gain greater familiarity, retailers have an exciting opportunity to incorporate GenAI advances into search and product discovery — supporting more flexible and groundbreaking experiences, and conversational language queries.

Have you tried conversational generative AI tools (e.g., ChatGPT, Bing Chat, Google Bard) in general?



n=869

Incorporating GenAI into product discovery

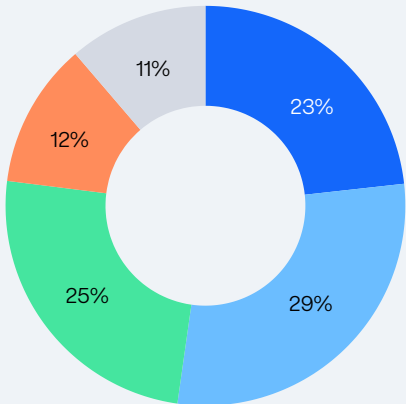
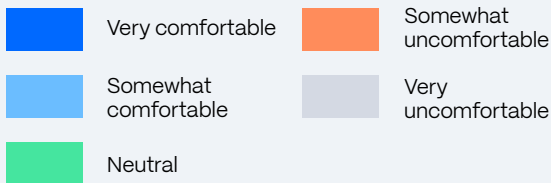
As their own knowledge and use of generative AI increases, shoppers this year are also increasingly receptive to using ChatGPT and other generative AI tools specifically for product discovery.

More than half (52%) say they'd be "very" or "somewhat" comfortable using GenAI on a retail site to find the right products for them — up 10 percent since last year (42%). Again, those older than 60 are a little less willing, with only 34% "very" or "somewhat" comfortable.

A quarter of shoppers this year (25%) report feeling neutral about using GenAI for product discovery.

2024 Results

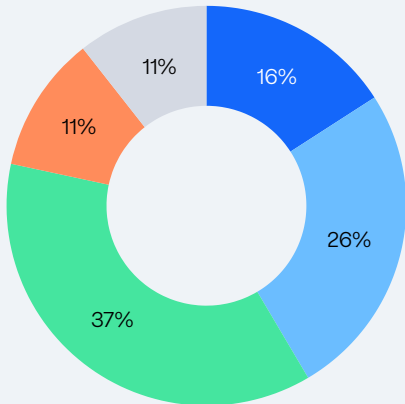
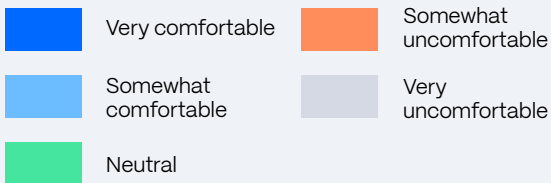
How comfortable would you feel using ChatGPT and other generative AI tools that understand human language on a retailer website to help you find the right products?



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2023 Results

How comfortable would you feel using ChatGPT and other generative AI tools that understand human language on a retailer website to help you find the right products?



*Totals exceed 100% due to rounding

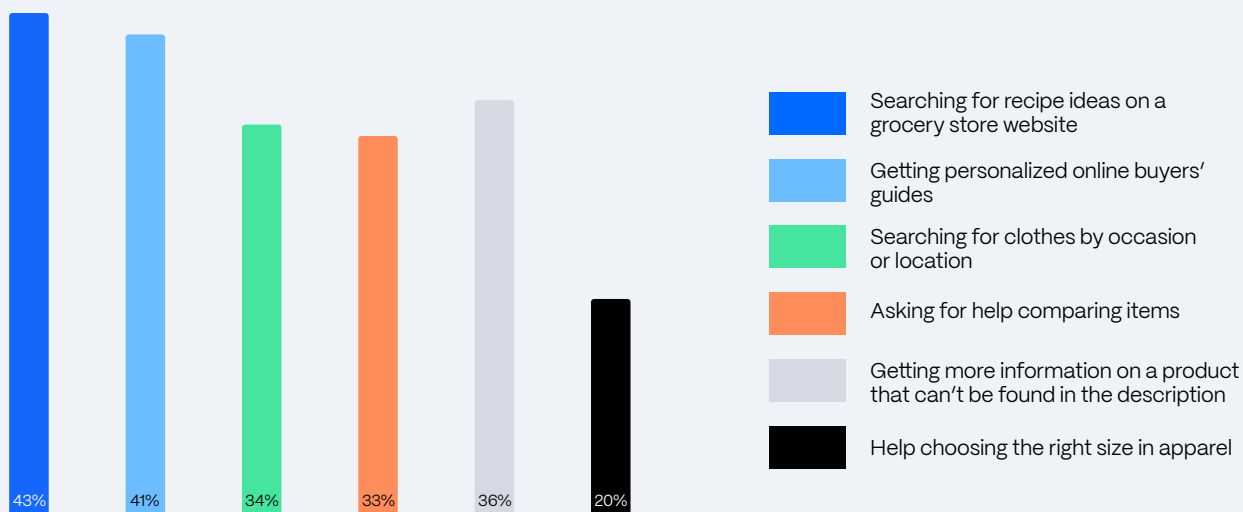
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When presented with specific situations and use cases for GenAI, shoppers expressed greater appetite for engaging with the technology.

They think it would most useful in product discovery instances such as:

- Searching for recipe ideas on a grocery website, and getting a list of in-stock ingredients to add to cart — 43% total (26% among those 60+)
- Generating personalized online buyer's guides — 41% total (28% among those 60+)
- Getting more detailed information on products — 36% total (44% among those 60+)
- Help choosing clothes by occasion — 34% total (19% among those 60+)
- Comparing various items — 33% (35% among those 60+)

In which situations do you think generative AI would be useful for ecommerce product discovery (helping find the best products for you)?



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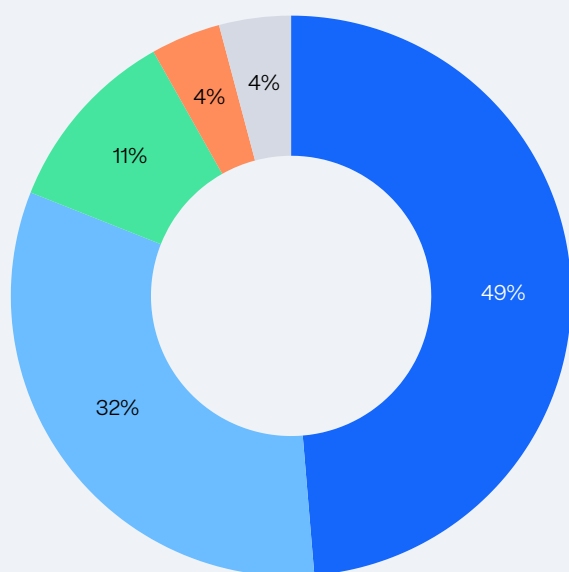
Being open about GenAI

Despite the headlines and hype, we're still very much in the early days of what GenAI can do for product discovery — as well as for ecommerce and the business landscape at large. As retailers experiment and identify compelling use cases, they'll likely have to educate consumers and internal audiences to help bring users on board and spur adoption.

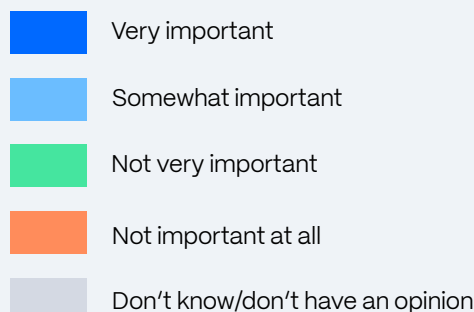
And as more GenAI-powered experiences emerge, shoppers are clear about wanting to know when/where the technology is being used. Nearly half (49%) say it's "very important" that retailers are transparent about their use of GenAI (53% in the US and 41% in the UK). Those 60+ and 45–60 years old are most likely to say it's "very important" (56%).

Overall, roughly one-third of shoppers (32%) feel such transparency is "somewhat important," and only 15% say it's "not very important" or "not important at all" (with 4% noting they "don't know").

So, as retailers implement GenAI responsibly and thoughtfully, they can make it an easy best practice to show consumers where it's used (such as with a spark/sparkle icon) and/or enable consumers to opt into GenAI experiences. For example, emerging GenAI-powered "shopping assistants" — embedded in ecommerce search, and able to process longform/natural language queries from shoppers — can be turned on with a toggle in the search bar. This enables consumers to select the GenAI experience (such as when they have a query that requires full-sentence explanation) or use traditional search when that's more appropriate.



How important is it for retail websites to be transparent with you about their use of generative AI technology?



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AI Assistance (and Assistants)

“I’m going camping for the first time with my pre-teens. What do we need?”

“What are some meal ideas that’ll please adults and picky kids?”

“I’m invited to a beach wedding in the Caribbean in August. What should I wear?”

Traditionally, when shoppers don’t know the exact items that’ll fit their needs — like in the situations above — they haven’t gotten a lot of help during online shopping. These types of lengthy questions (and the resulting dialogue) are best saved for trusted in-store associates; there hasn’t really been a digital equivalent.

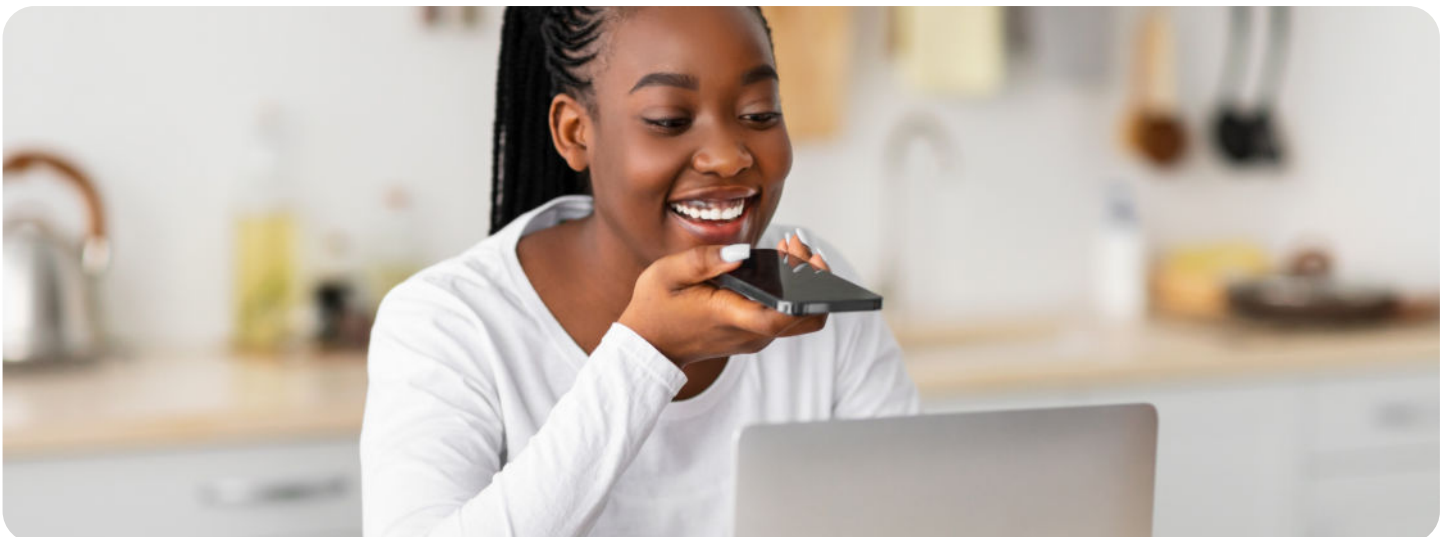
But generative AI is shaking things up, upending traditional search and product discovery models. Emerging GenAI-based virtual shopping assistants are just one way the landscape is changing.

Often embedded in search, these AI assistants can understand complex language and questions, and provide product suggestions — often across categories — that make sense, are in-stock, and are personalized to the shopper. It’s yet another

way AI is helping forge digital experiences that emulate some of the most helpful aspects of in-store ones.

Unheard of even a year ago, solutions like AI assistants are becoming more prominent: developed by select ecommerce companies and also available through tech vendors as whitelabeled solutions.

Survey data highlights a need for this type of technology, with current product discovery models not serving consumers well when they have complex needs. The data also illustrates the promise these technologies hold: When they’re unsure of what to buy, more than 6 in 10 shoppers (61%) say they’d “definitely” or “probably” be willing to let an AI assistant help.



Product recs and AI assistants: Top 2 desired applications

GenAI holds the potential to shape, expedite, and improve many areas of ecommerce: both customer-facing processes like product discovery, as well as internal ones.

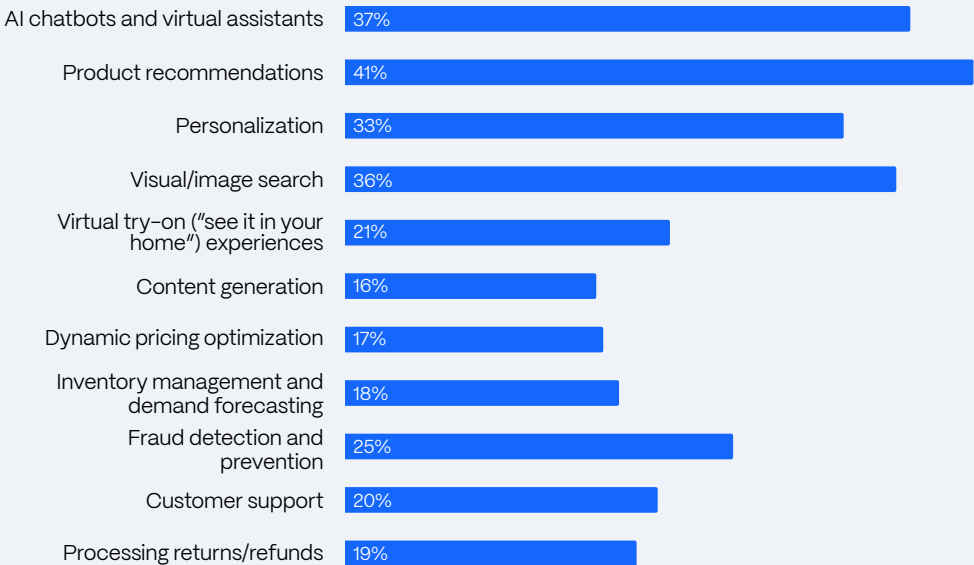
Shoppers shared where they think the technology has the greatest potential across ecommerce — with GenAI-based product recommendations (41%) and AI chatbots/virtual shopping assistants (37%) emerging as the top 2 killer applications. (However, only 20% of those 60 years+ selected virtual shopping assistants.)

Other areas of GenAI interest: visual/image search (36%), personalization (33% total; 23% among

those 60+), and fraud detection (25%) — with fraud detection a bigger priority in the US (29%) than UK (19%).

Consumers also felt GenAI could be useful in these additional areas of ecommerce: virtual try-on technology (21%), customer support (20%), returns (19% — with greater appetite in the US at 23% than UK at 12%), and inventory management (18%), to name a few.

In which areas of ecommerce do you think generative AI (such as ChatGPT) could be useful?



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Current product discovery paradigms fall short

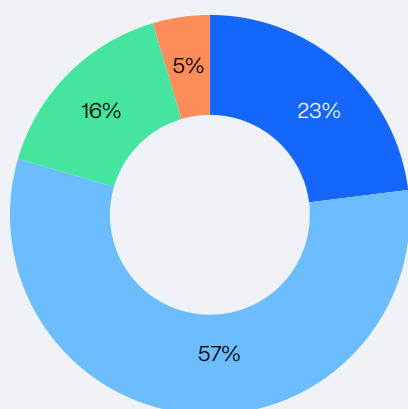
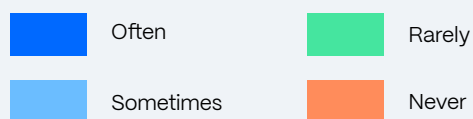
The way shoppers search — with terse keywords, omitting articles... sometimes dubbed “caveperson speak” — and the way search engines understand them hasn’t changed much over the last couple decades. But when shoppers don’t quite know the item that fits their needs, is this model serving them well?

Data shows that 8 in 10 shoppers (80%) “often” or “sometimes” go to ecommerce websites unsure of what they want to buy.

In these cases though, retailers have some work to do in providing advice, making shoppers’ lives easier, and guiding them to purchase. When they’re unsure of the best product(s) for their

needs, nearly 1 in 3 shoppers (32%) say the retail site makes it “somewhat difficult” or “nearly impossible” to find the right item. This is a greater pain point in the US (36%) than UK (26%). It also highlights the need for more flexible product discovery models and search interfaces that can successfully engage and accommodate shoppers.

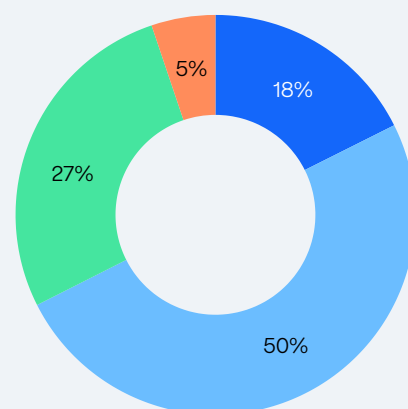
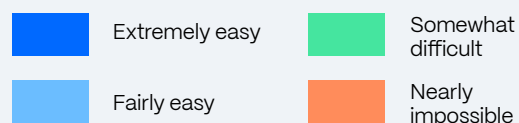
How often do you go to a retail website to make a purchase, but not know exactly what you want to buy?



*Totals exceed 100% due to rounding

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In cases where you’re unsure what to buy (e.g., birthday gift for a friend or outfit for an event — but you’re not sure what), how easy do retail sites make it for you to discover the right item?



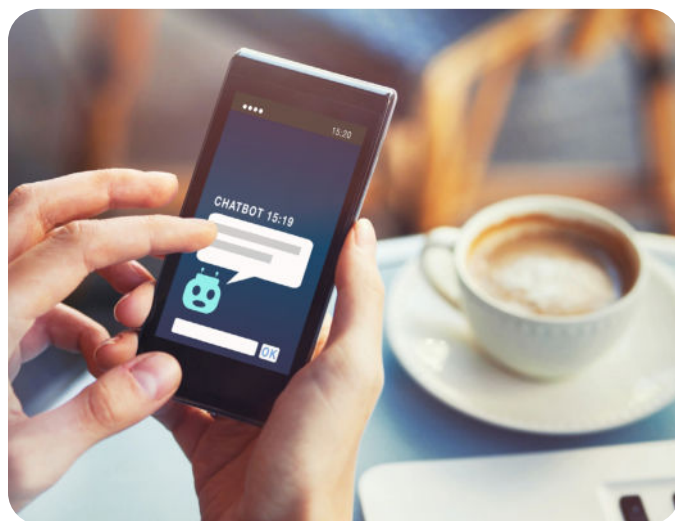
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Getting AI assistance

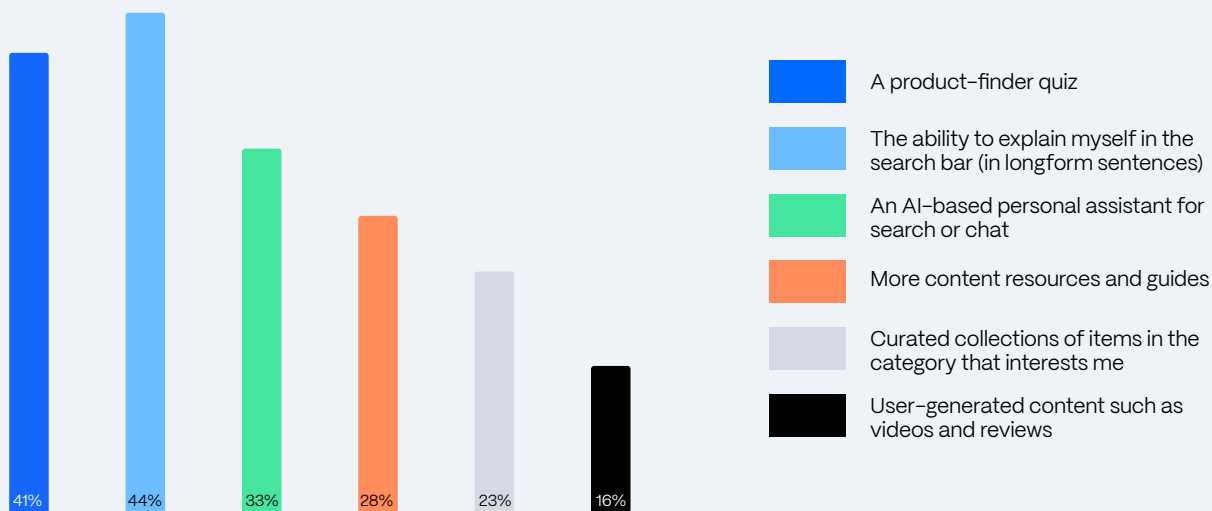
When shoppers are unsure of what, exactly, they want, forward-looking retailers can provide intelligent assistance, guide shoppers in their journeys, and alleviate uncertainty and indecision.

Consumers provided input on what would help them when they're feeling unsure. Features often associated with AI assistants — including the ability for shoppers to explain themselves in full sentences, within ecommerce search (44%) — and AI assistants themselves (33% total; 21% among those 60+) ranked among the most desirable features.

Shoppers also expressed a preference for product-finder quizzes (41%) and more content/guides (28% total; 36% among those 60+).



In cases where you don't know exactly what to buy upfront, what would help you? Please check all that apply.



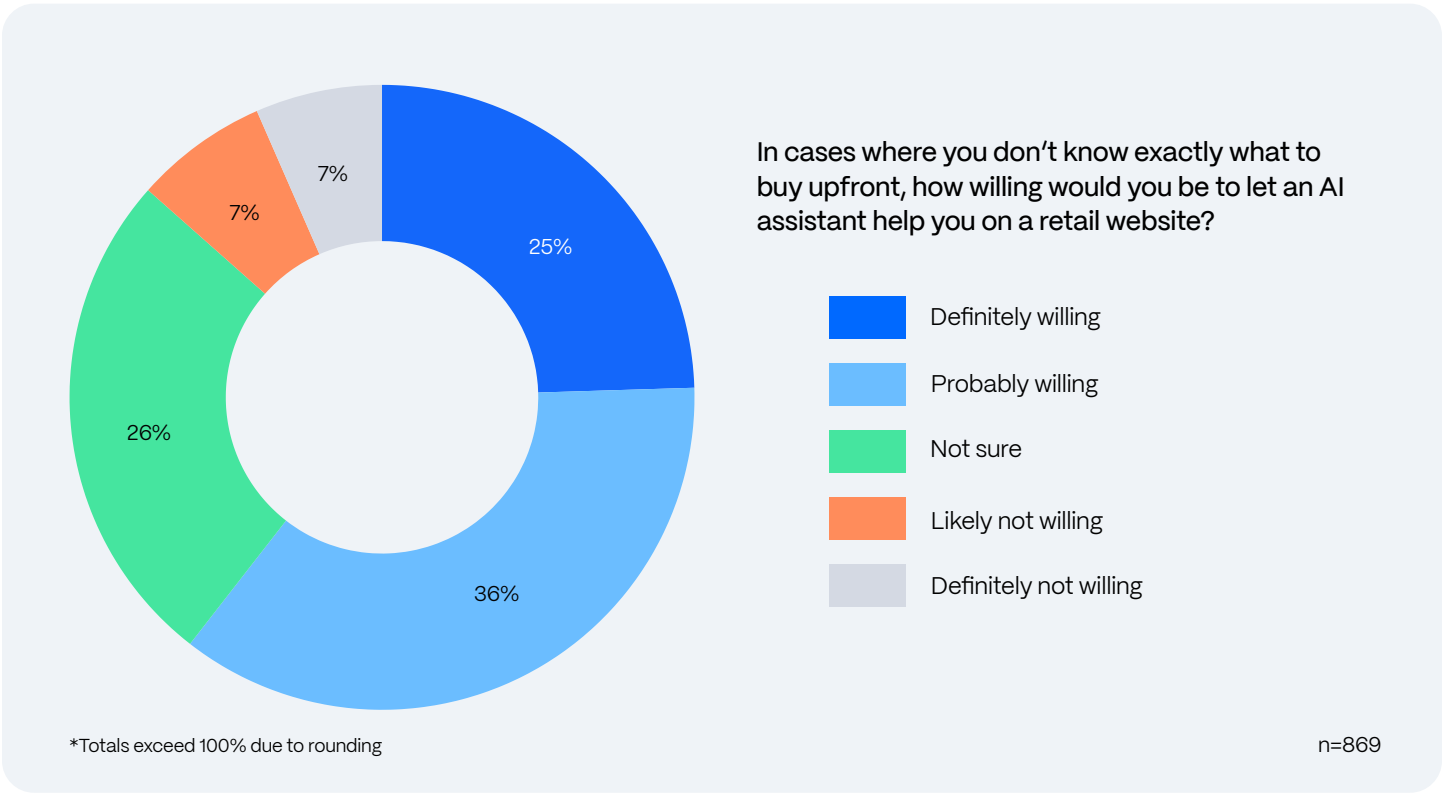
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When given more information about AI assistants — and their ability to respond to complex queries, engage in dialogue, and provide personalized recommendations — shoppers were even more enthusiastic about engaging with them.

More than 6 in 10 shoppers (61%) say they’d “definitely” or “probably” be willing to get help from an AI assistant when they’re not sure what to

buy. There was a slightly stronger appetite in the UK (64%) than US (58%). Among those 60+, 44% were “definitely” or “probably” willing.

Overall, a quarter of consumers (26%) say they’re not sure about getting help from an AI shopping assistant — opening the door for retailers to provide education and highlight success stories as a means to encourage greater adoption.



Results Recap

Here are 10 actionable takeaways and key statistics from this survey of US and UK online shoppers:

- 1 **Making the grade?** More than 4 in 10 shoppers (42%) give retailers' search and product discovery experiences a "C" grade or below.
- 2 **Time for a change:** 68% of shoppers think the search function on retail websites needs an upgrade. US shoppers (71%) feel more strongly than UK ones (61%).
- 3 **Search struggles and slowdowns:** Only a quarter of shoppers (24%) say that finding products on retail websites is "quick." And 41% have to "frequently" or "always" reformulate search queries to get the engine to understand them.
- 4 **Have we met... ever?** Despite their previous engagement and purchase history, more than 4 in 10 online shoppers (44%) say that when they shop with their favorite retailer online, the site treats them like a total stranger.
- 5 **Time to bounce?** When ecommerce sites make it difficult for shoppers to find appealing items, shoppers are more likely to abandon the site (52%) — buying the item from a different retailer (48%), such as Amazon (38%) or through Google (27%).
- 6 **Great product discovery pays off:** If guaranteed an excellent search and product discovery experience, a quarter of shoppers (24%) say they'd be willing to pay 5–10% more for the item they're seeking. That's up from 15% last year.
- 7 **Mobile matters:** 1 in 5 consumers (21%) do all their online shopping from their mobile device(s). This was consistent across age groups.
- 8 **GenAI usage expands:** 51% of shoppers — up from 29% last year — say they've tried GenAI tools like ChatGPT, Google Bard, and Bing Chat. Usage differs among age groups: For example, 64% of those 18–29 have used such tools, compared to 26% of those over 60.
- 9 **Growing comfort with GenAI for product discovery:** More than half of shoppers (52%) would be "very" or "somewhat" comfortable using GenAI on a retail site to find the right products for them — up 10 percent since last year (42%). Among those 60+, 34% are "very" or "somewhat" comfortable.
- 10 **AI alleviates indecision:** 8 in 10 shoppers (80%) "often" or "sometimes" go to ecommerce websites unsure of what to buy. When they're feeling uncertain, 61% would "definitely" or "probably" be willing to get help from an AI-based shopping assistant on the site. These assistants can process longform (full-sentence) queries and provide recommendations that are in-stock and personalized to the shopper.

AI-based search and product discovery

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