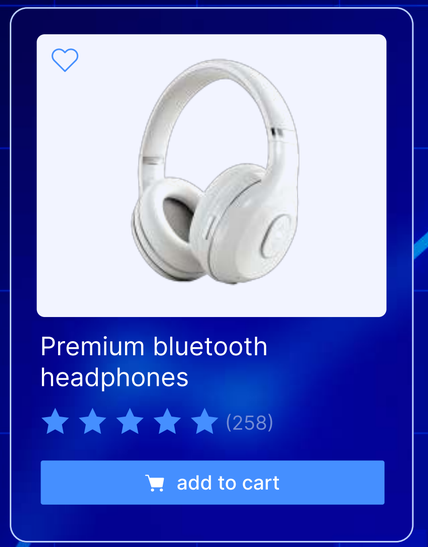
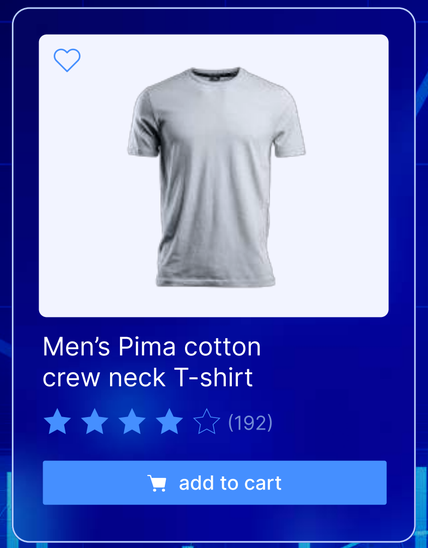
2025

B2C Ecommerce Site Search Trends

The 2025 B2C Ecommerce Site Search Trends report takes a deep dive into key issues driving search and discovery for retail and ecommerce businesses across the global B2C online ecosystem.





algolia

Coleman Parkes

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Introduction

About the report

The 2025 B2C Ecommerce Site Search Trends report takes a deep dive into key issues driving search and discovery for retail and ecommerce businesses across the global B2C online ecosystem.

Leading B2C organizations are undergoing significant shifts as they navigate the delicate balance between the art and science of merchandising. They are also working to create more meaningful user experiences and improve bottom-line results against a backdrop of rapidly advancing smart capabilities like agentic AI.

This report looks at how businesses are responding and adapting to changing consumer expectations, new technologies, and larger macroeconomic forces. It offers critical insights into the future of B2C search and product discovery as we move into 2026 and beyond.

In 2025, search continues to play a critical role in B2C ecommerce despite continuing operating environment pressures on businesses– investment has grown by 6% in the past year and is projected to see continued growth in 2026. Over a third to one-half of B2C businesses plan to implement new search features in the next 12 months.

The 2025 B2C Ecommerce Site Search Trends report takes a detailed look at the range of dynamic strategies employed by businesses in a volatile and hyper-competitive marketplace.

Global reach - Report participants and details

This year's B2C Ecommerce Site Search Trends report as always is based on research conducted in conjunction with our partner firm Coleman Parkes. As part of the report, we surveyed 1,100 individuals operating in retail and ecommerce businesses around the world.

Our team reached out to IT (ITDM) and business (BDM) decision makers responsible for driving search and discovery in their organizations.

The majority of respondents (57%) operate in businesses where over half of their revenue comes from brick-and-mortar stores. The remaining respondents (43%) are ecommerce focused, with most revenue coming from online sales.

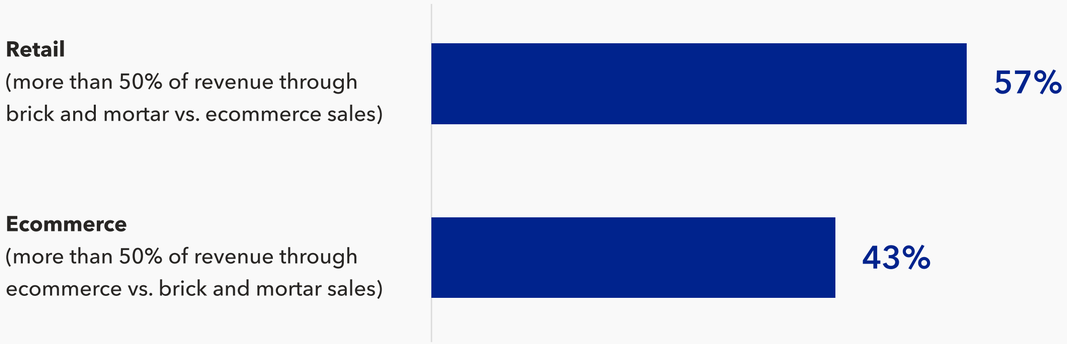
Participants were drawn from key markets around the globe:

- US - **27%**
- United Kingdom, France, and Germany - **55%**
- Australia, New Zealand - **18%**

North America	300	USA
Europe	600	UK, France, Germany
APAC	200	Australia, New Zealand



Sector Splits



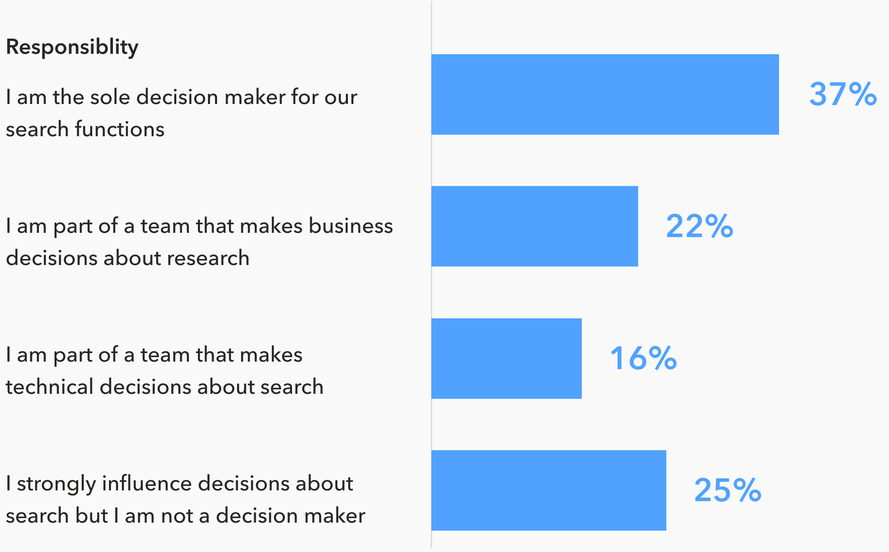
Company size and responsibilities

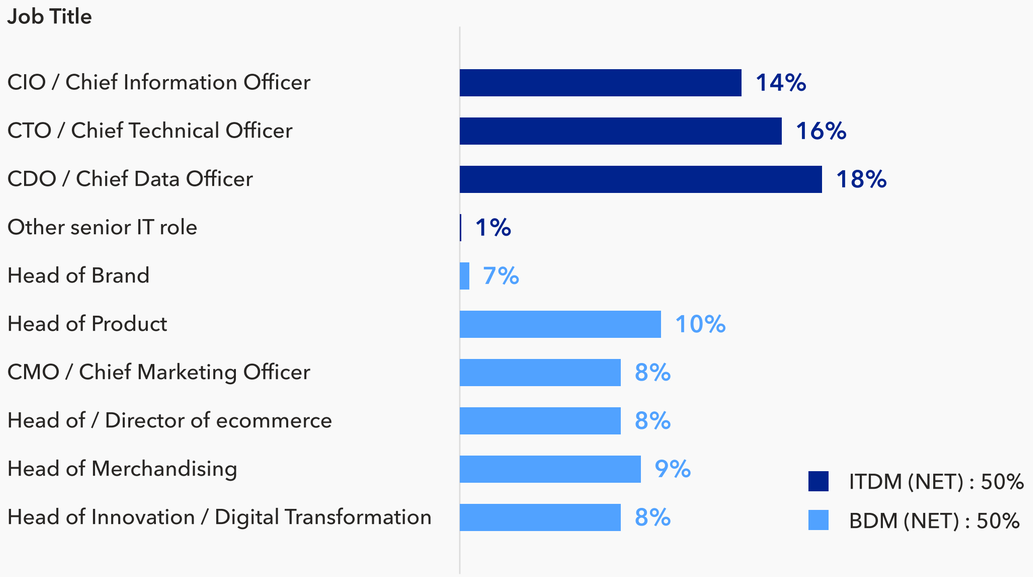
The report is based on data assembled from an equal number of IT and business decision makers. Respondents included CIO, CTO, and CDO officers as well as those in senior leadership roles across brand, product, merchandising, and product functions.

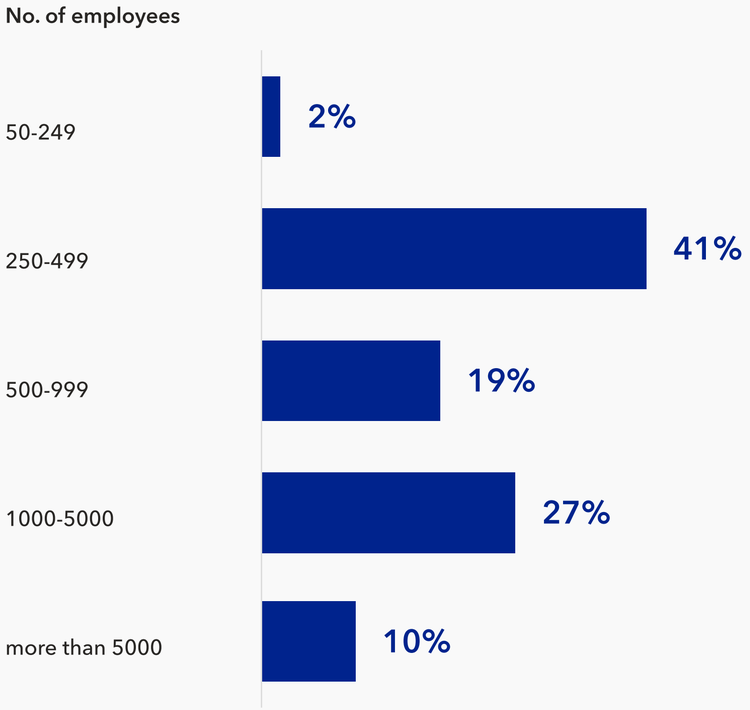
When it comes to organization wide search decisions:

- **37%** - are the sole decision makers for search
- **25%** - strongly influence decisions around search
- **22%** - are part of a team driving search decisions
- **16%** - are technical decision makers involving search

Business Profile

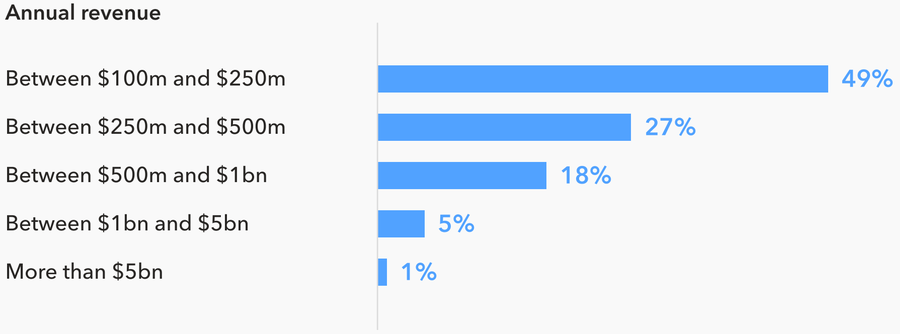






Most participants are larger enterprise companies with 1,000 to 5,000 employees **(27%)** or operating in small businesses with 250-499 employees **(41%)**.

Average revenue across businesses surveyed is $566 million, with the largest group generating $100-250 million annually, representing 48% of those contacted. The next largest group at 27% are generating annual revenue between $250 - 500 million.



Executive Summary

As businesses look ahead to 2026, the expectations surrounding online shopping are higher than ever. Consumers increasingly demand seamless, intuitive, and personalized shopping experiences, driving B2C brands to reimagine how they connect with their customers.

The 2025 B2C Ecommerce Site Search Trends report, based on insights from 1,100 global IT and business decision-makers, reveals a market in transformation. While economic and operational pressures remain, B2C organizations are doubling down on digital innovation, prioritizing search and personalization to both increase revenue, improve processes, and enhance customer experience.

Search investment will grow in 2026

Investment in search has grown steadily, with a 6% year-over-year increase and continued momentum expected into 2026. These investments are driven by multiple factors, most notably the desire to boost revenue, which has grown as a critical incentive by nine percentage points since 2024.

Increasing revenue is also the leading motivator driving search and discovery initiatives in major markets such as France (63%) and the US (56%). Beyond France and the US, the top three reasons global businesses are investing in search are:

- Increasing revenue **(58%)**
- Meeting evolving customer demand **(45%)**
- Enhancing the customer experience **(39%)**

At the same time, satisfaction with these investments is high: seven in 10 companies report positive returns from their search and discovery implementations.

Importance of agentic AI

In 2025, more than 60% of B2C organizations reported plans to deploy agentic AI within the next 12 months, marking a strong commitment to strategic implementation.

These advanced AI agentic systems are being embraced for their ability to drive faster, smarter, and more personalized customer experiences while improving operational efficiency. Among B2C organizations:

- **42%** are already using AI to understand user intent –up from 34% in 2024
- **89%** cite AI's ability to summarize customer reviews as a top benefit
- **50%** acknowledge a direct link between AI-powered intent recognition and increased revenue

- **63%** support the claim that shoppers are more likely to complete a purchase when using AI-supported systems

Merchandisers and business teams are especially eager for AI tools that go beyond basic analytics to provide actionable insights. Agentic AI addresses these needs by equipping teams with advanced data interpretation and automation capabilities—freeing them to make more strategic decisions.

Personalization remains paramount

Personalization continues to be an important part of the online shopping experience as consumer expectations are increasingly shaped by AI-driven platforms. As generative AI becomes more deeply embedded in digital ecosystems, B2Cs are using it to power tailored, real-time interactions across the buyer journey.

When asked about the most valuable AI-powered search features, 91% of respondents ranked "search by image" as the most beneficial—a sign that intuitive, visual search is becoming a new industry standard. In terms of digital priorities over the next year, businesses cited:

- Search **(31%)**
- Payments **(28%)**
- Personalization **(23%)**

Shopping behavior is also evolving. More than 60% of respondents indicate that new modes of multimodal search, which allow shoppers to use more of their senses, are increasingly important.

Strategic drivers and competitive pressures

Beyond customer expectations, fear of missing out is having a major influence on digital strategy. In 2025, 39% of businesses are accelerating AI adoption and search investments to stay competitive. Meanwhile, 53% reported already making strong search investments, consistent with 2024 levels.

One key area of differentiation is the type of search solutions B2Cs are choosing. Nearly half (49%) are opting for third-party providers, citing the advantages of flexibility, next-generation capabilities, and seamless integration. This outpaces those building in-house solutions (27%) or using off-the-shelf software (23%), indicating a strong preference for scalable, proven platforms.

Human + AI together

While AI is central to the future of B2C commerce, human judgment remains critical, especially in areas like brand strategy and merchandising.

AI will take on more of the real-time data processing, but success will depend on its ability to integrate smoothly with existing backend systems and workflows. Businesses are aware that without adaptability and ease of use, even the most advanced AI solutions will fail to deliver impact.

When asked about the key factors influencing the adoption of agentic AI search systems, respondents identified three major considerations:

- Smooth and efficient system integration - **47%**
- Ensuring retailer control over technology - **37%**
- Return on investment (ROI) - **39%**

The combination of smarter AI, stronger personalization, and a relentless focus on customer experience is setting a new bar that forward-looking organizations are already preparing to meet.

As we head into 2026, integrating intelligent technologies while keeping human insight at the center of business strategy is key. Brands that can harness this approach will be best positioned to win the loyalty of tomorrow's consumer while generating meaningful bottom-line results.



Key Findings

B2C organizations are entering a new era as we move into 2026. Companies are embracing next-generation AI solutions like agentic AI while adapting to shifting customer expectations. They are also subject to important macroeconomic pressures, the most critical of which is the need to navigate a volatile global trade environment that's reshaping supply chains, increasing pressures on margins, and redefining the ecommerce experience for businesses and customers alike. Here are some of the standout insights from the 2025 B2C Ecommerce Site Search Trends report:

AI is creating new baseline standards that customers expect and B2Cs must deliver

AI-driven intent recognition continues to be a major focus, with significant growth expected. In 2025, 42% of businesses use AI for understanding user intent, up from 34% in 2024. Meanwhile, businesses with no plans to implement AI has decreased from 23% to 14% over the same period. The integration of specific UX search and discovery features, alongside AI-powered capabilities like agentic AI, are now an integral part of driving dynamic customer interactions, UX baseline features, and relevance.

Agentic AI will enable merchandisers with data and solutions

Merchandisers and business teams need tools that not only surface deeper data insights but also recommend actionable strategies. While 61% are planning to implement agentic AI in the next 12 months, humans will still have the upper hand in interpreting data and shaping brand and merchandising decisions. Agentic AI will significantly reduce the real-time drain involved in analyzing numbers and spotting trends. However, any new AI implementation will offer limited value to B2C merchandisers, BDMs or ITDMs if it is difficult to use, lacks intuitive update capabilities, or fails to integrate seamlessly with backend systems.

AI-powered features will power personalization into 2026

Consistent with 2024 results, personalization remains a critical aspect of what B2C offers customers. Moving into 2026, gen AI will power new capabilities and solutions across the ecosystem. The top three search features consumers want to see in the future are:

- Hyper-personalization **(68%)**
- Predictive shipping suggestions **(62%)**
- Multimodal search **(60%)**

Fear of missing out (FOMO) is driving 39% of B2C investments

In 2025, 53% of businesses reported that they had adequately invested in search–a figure broadly consistent with last survey's levels. However, 39% admitted to under-investing and plan to become more active in 2026, potentially signaling FOMO. These businesses are looking to catch up with their peers and realize the benefits of adopting new technologies such as agentic AI.

Third-party search solutions continue to be popular

The data shows that B2Cs have a clear preference for third-party search solutions, consistent with the previous survey. Globally, 49% of B2Cs choose third-party search solutions, while only 27% develop search capabilities in-house. Off-the-shelf pre-packaged software remains the least popular option at 23%. The results affirm third-party search's ease of use, long-term benefits, level of control and flexibility, as well as next-generation capabilities.



Current search investment and capabilities

What is the current state of B2C?

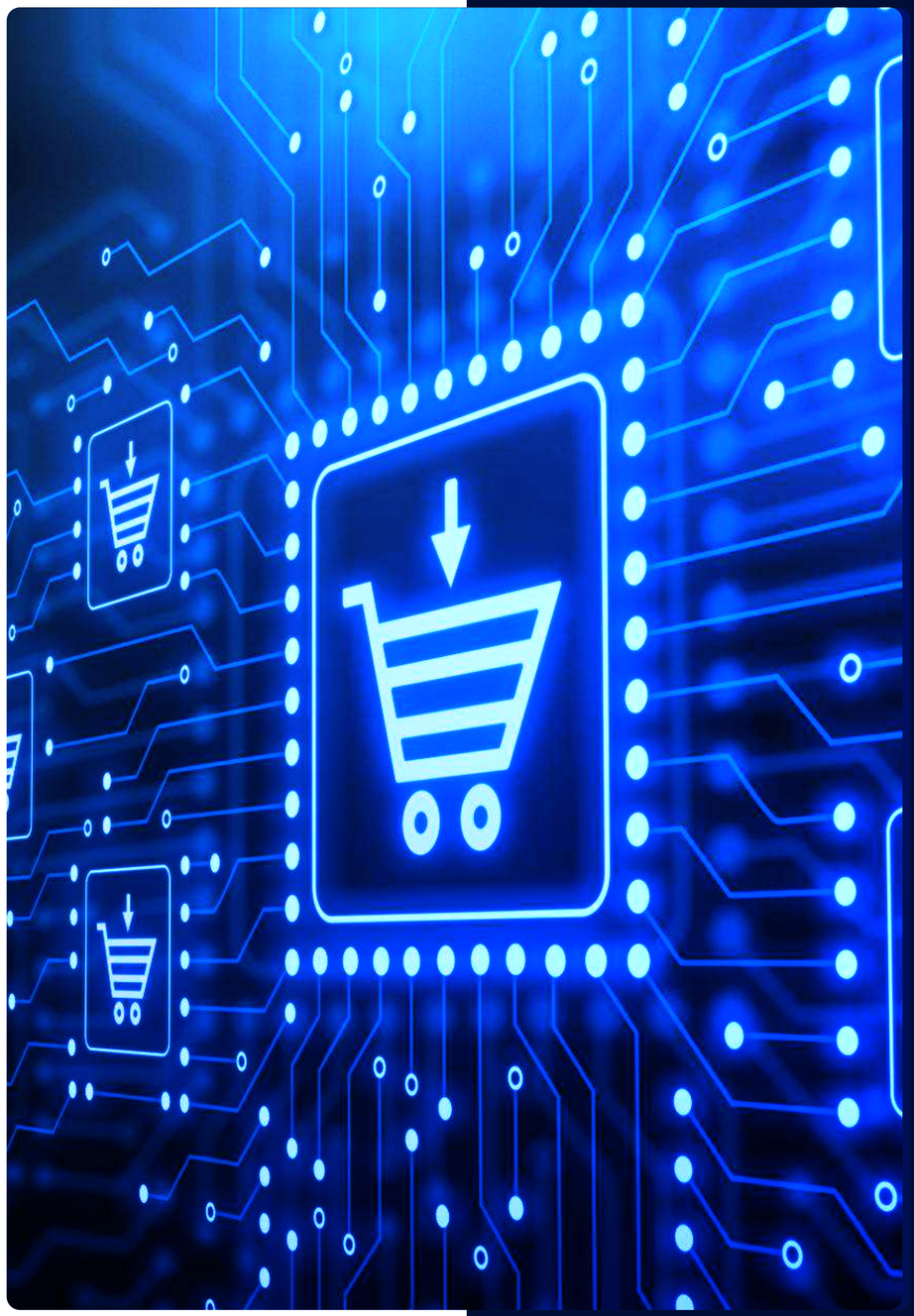
Investment levels are stable but over a third are looking to catch up

This year, a majority of businesses (53%) reported making adequate investments in search, mirroring levels observed in last year's report. However, 39% indicated under-investment. This is a significant proportion and a 7-percentage-point increase compared to previous years.

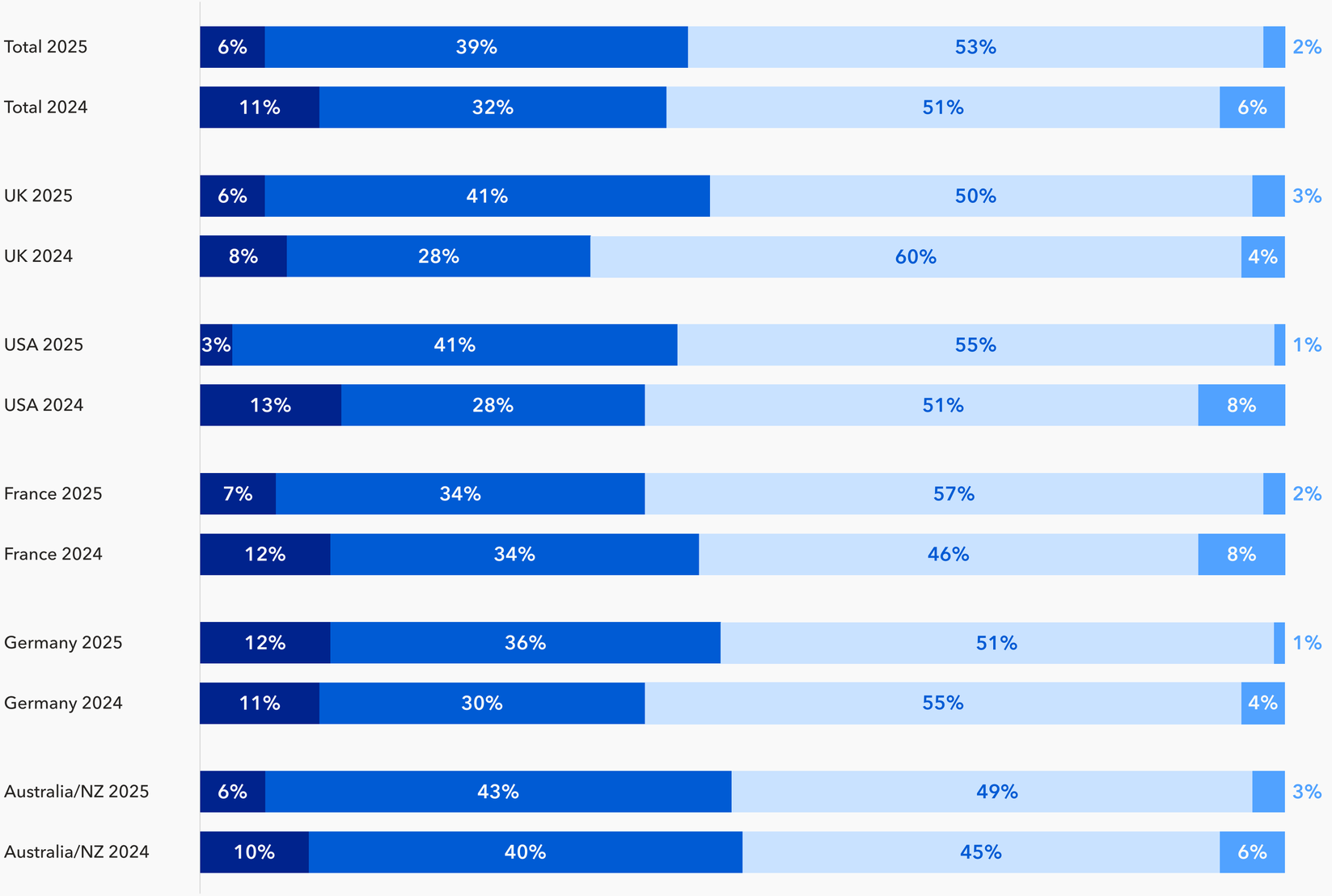
The sentiment that "we're not quite where we should be" is reflected in this trend and is particularly pronounced in the UK, US, and Australia/New Zealand. In contrast, France stands out with a notable uptick in investment in search and discovery capabilities.

Another consequence of the ecommerce search investment imperative is the decline in organizations reporting no investment – from 11% in 2024 to just 6% in 2025.

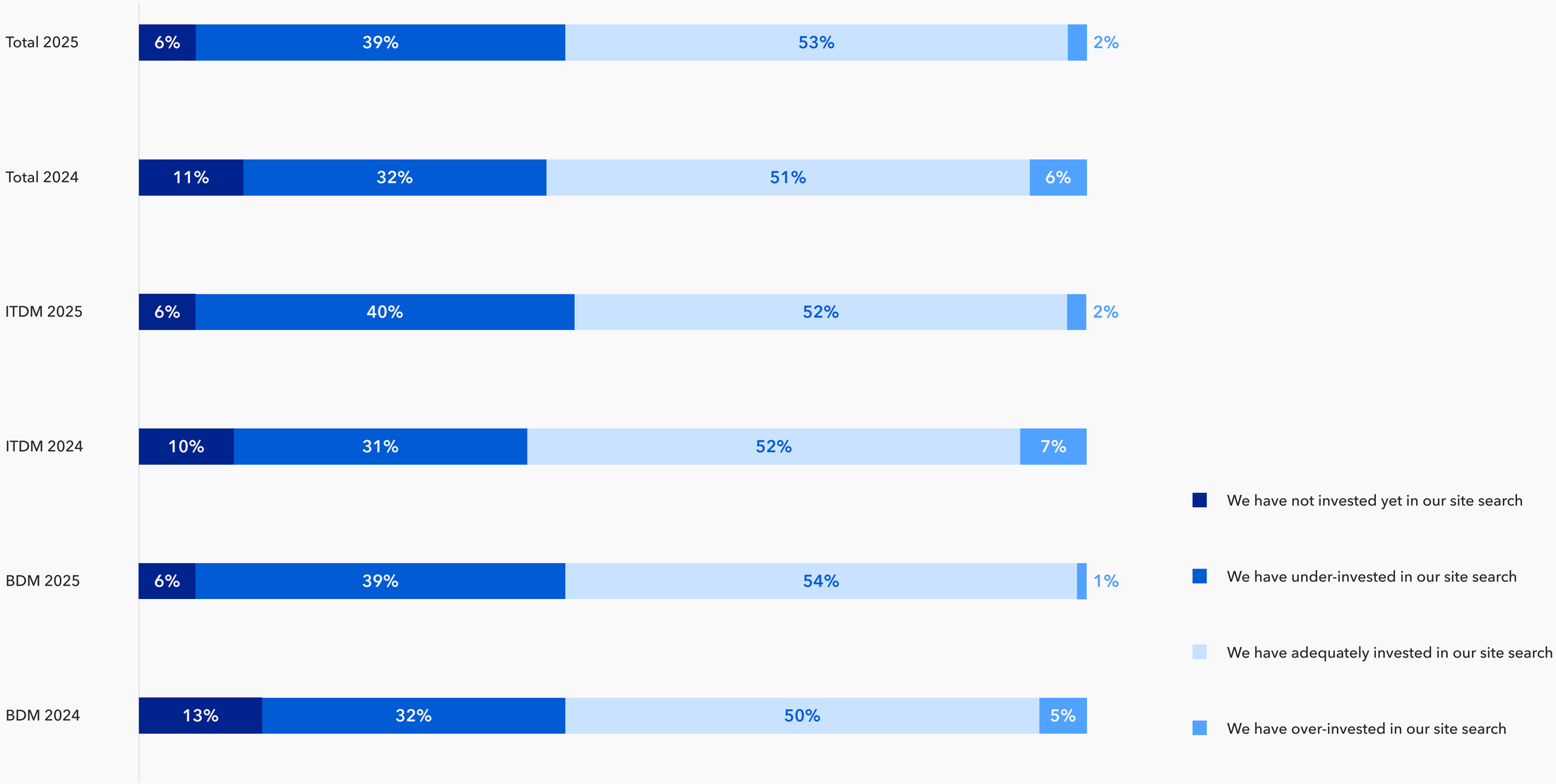
This drop underscores the vital importance that B2Cs place on keeping up with developments in search and its utility as a critical and central business function now being shaped by technologies like agentic AI.



Level of investment in ecommerce search function



Level of investment in ecommerce search function





Third-party search solutions remain popular

Businesses continue to choose third-party search solutions like Algolia AI Search (49%) over developing search capabilities in-house (27%).

Off the shelf pre-packaged software remains the least popular option at 23%, a result that is largely in line with 2024 levels.

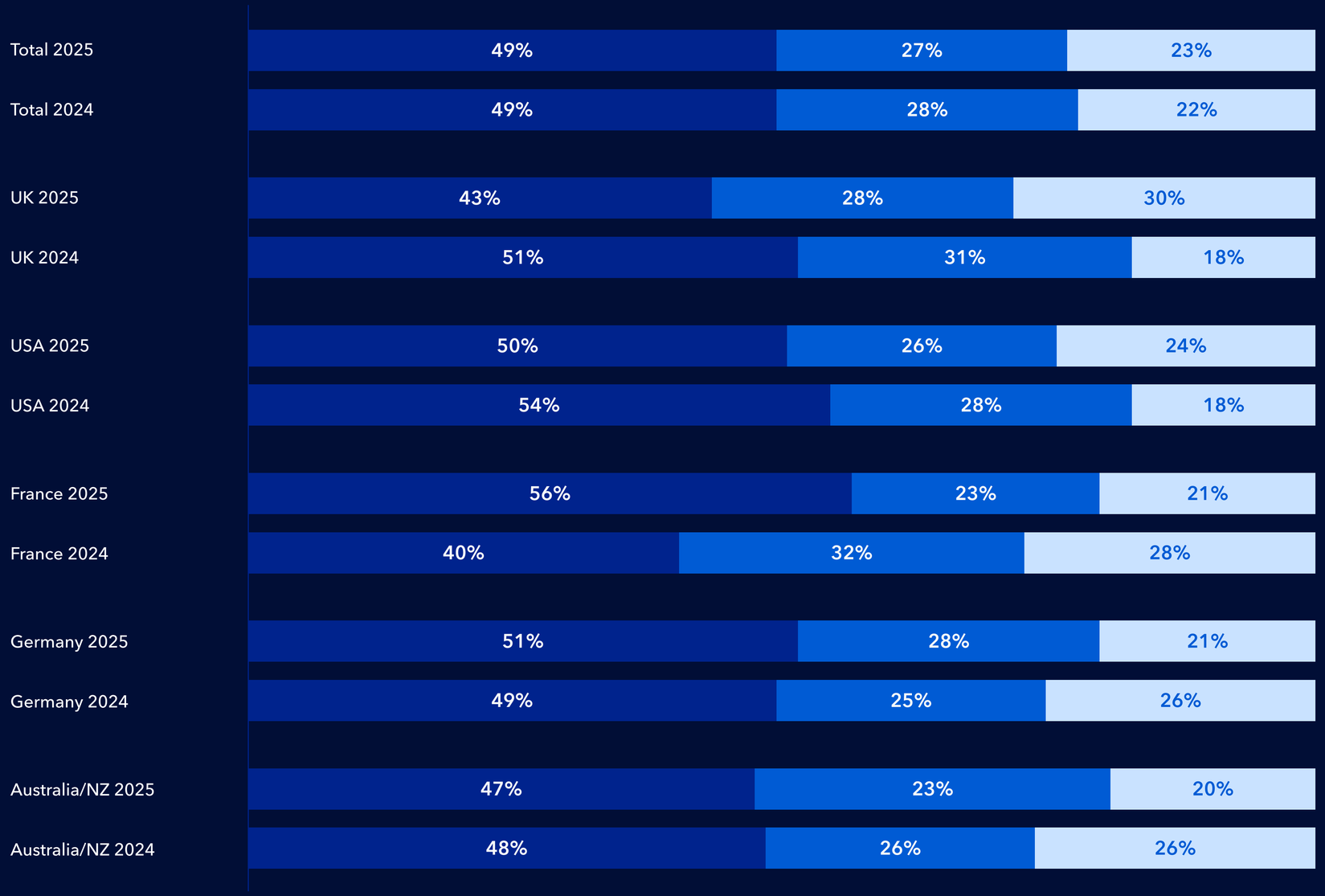
In France, along with the strong upturn in search discovery investment, businesses are trending towards third-party collaboration solutions alongside a subsequent decrease of in-house development in 2025.

While off-the-shelf solutions have become more common in both the UK and US compared to the last survey, they remain a less popular option in those markets compared to third-party collaborations.

Across 2024 and into 2025 in-house development continues to be more active in the German, UK, and particularly the Australia/New Zealand markets.

Ease of use, lower friction, quick implementation, and the need to hire committed teams dedicated to developing new AI-powered search solutions continue to drive businesses' preference toward third-party search over other available options.

Development of search capabilities



But in-house search development presents significant challenges

For the 27% of companies that choose to develop search and discovery solutions in-house, development challenges remain a significant impediment.

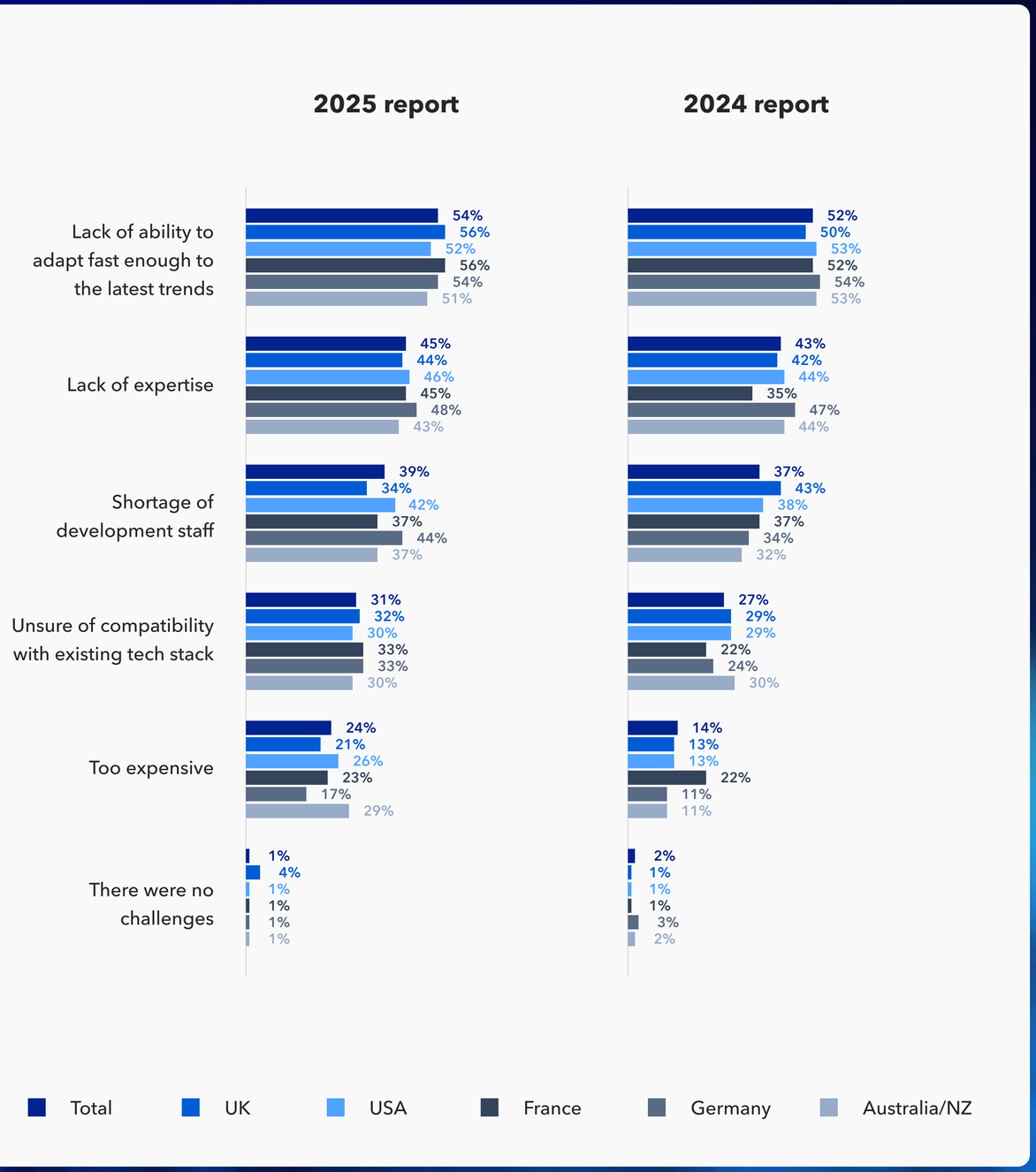
Though cost is now a more important concern than it was in 2024, growing in importance from 14% to 24%, it does not top the list of the challenges that come with developing search in-house.

The top three challenges revolve around keeping up with new technology and securing the talent needed to ensure that in-house solutions are up-to-par. The biggest challenges are:

- Adapting quickly to trends - **54%**
- Lack of expertise - **45%**
- Shortage of development staff - **39%**

It is also not surprising to find that ensuring compatibility with existing tech stacks comes in at fourth place at 31%.

Taken together, the technological, human resources, compatibility, and cost issues affirm the inherent difficulties of building search and discovery from the ground up in-house and the clear benefits of powerful third-party solutions.



Popular search features are becoming a UX baseline

When asked what search features they have implemented, or are planning to implement in 2025, responses remain consistent with those from last year's survey, although there are some notable exceptions, particularly in the area of AI implementations.

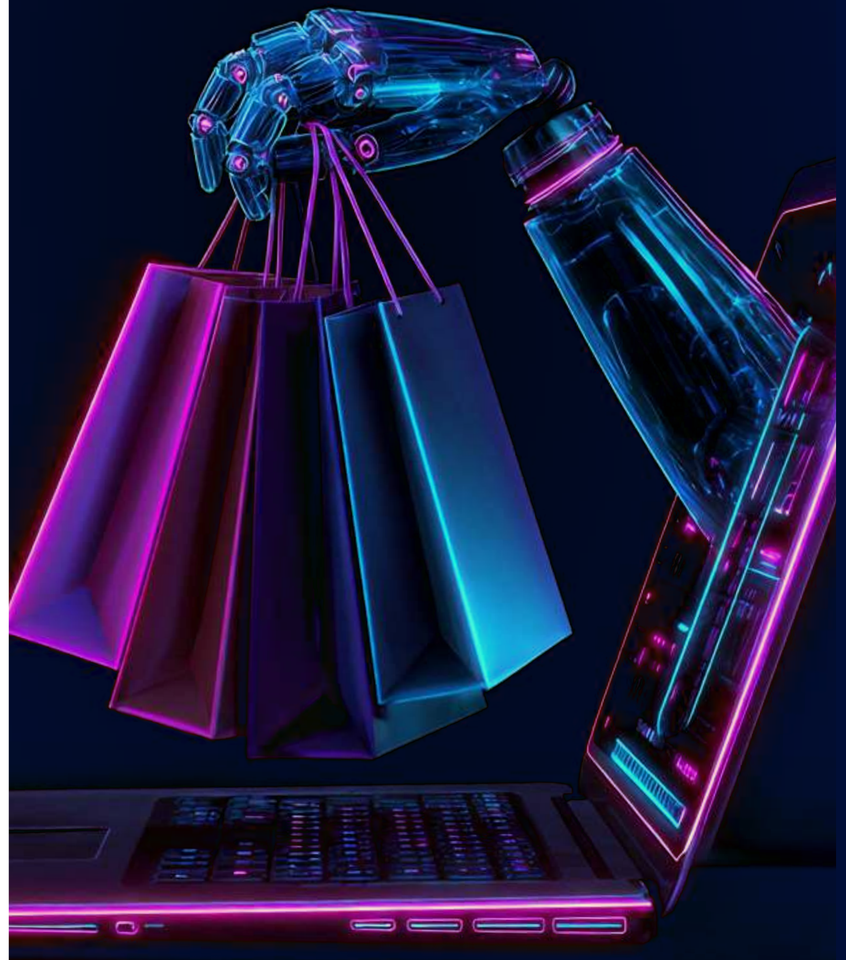
Features that respondents say are already implemented, such as content search (56%), merchandise search (49%), offer recommendations (46%) and "as you type" results (44%), continue to be popular.

While 50% of users have already implemented synonyms and auto-type search capabilities, an additional 39% plan to adopt these features within the next 12 months – up from just 33% in 2024.

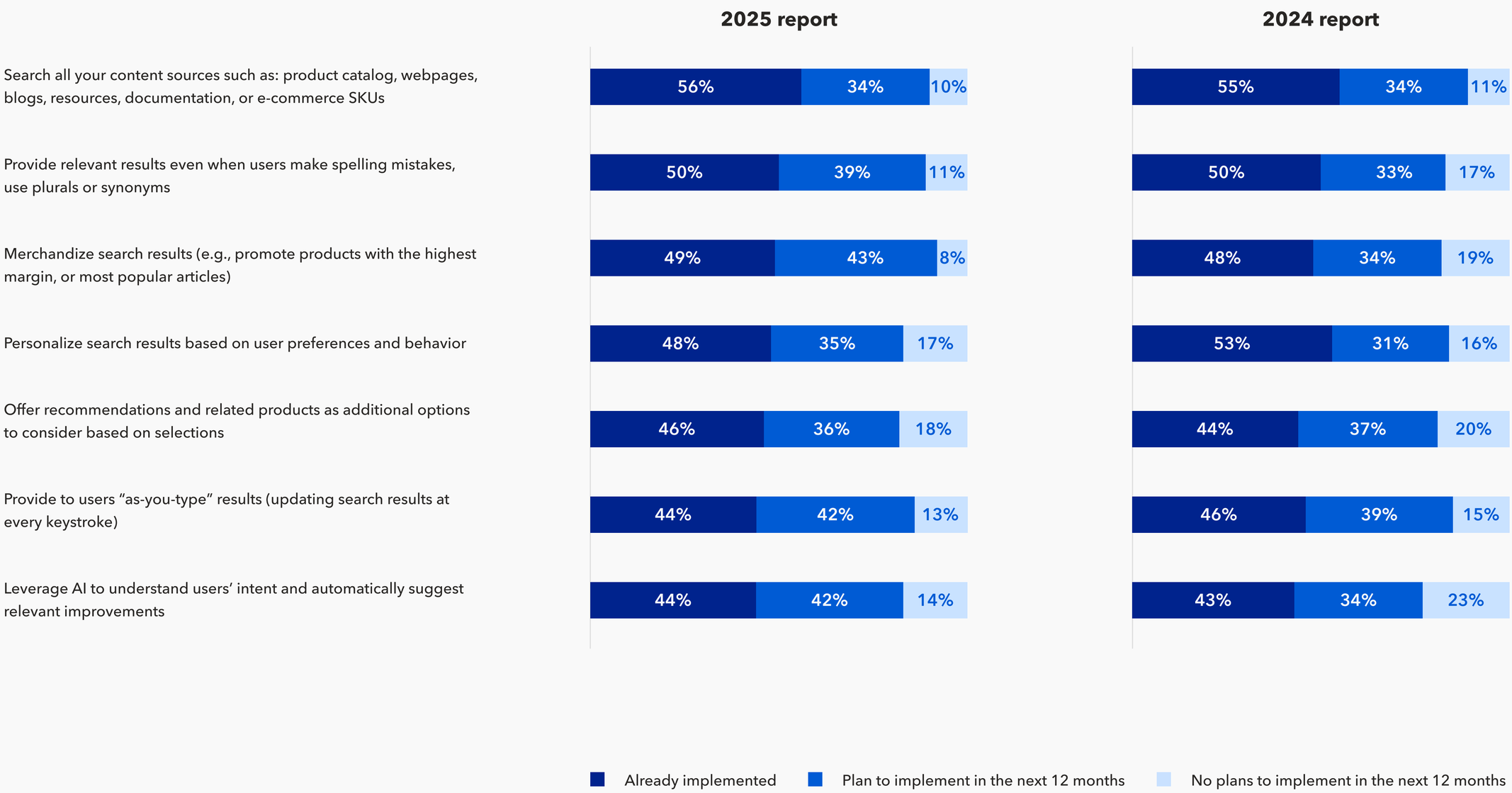
This is part of a larger plan in which companies are looking to add important search capabilities that are not yet available to customers who are shopping on their websites.

A good example is intent recognition, a feature that will see continued growth. In 2025, 42% plan to implement AI to understand user intent, up from 34% in 2024. In the same period, the number of users with no plans to implement AI to understand user intent has dropped from 23% to 14%.

The growing adoption of advanced UX and AI search and discovery functionality indicates an enhancing of customer expectation baselines when shopping and browsing online. B2C websites that haven't yet embraced these types of solutions are now integrating them into their user journey, not just to remain competitive but also to stay relevant.



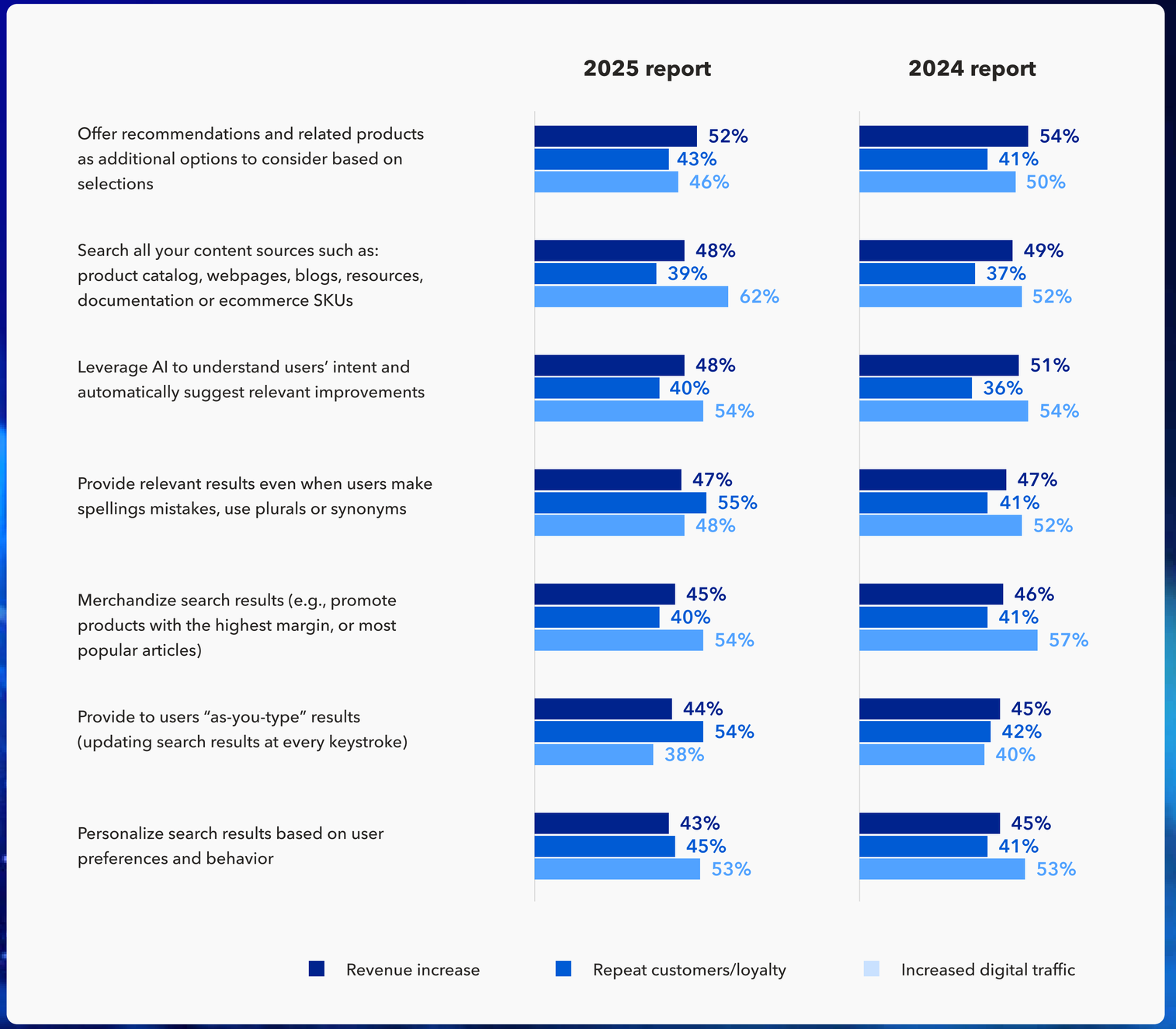
Search features implemented or planning to implement



The impact of specific implementations on revenue

Based on users that have already implemented the solutions, and taking into account customer loyalty and traffic metrics, the most impactful search and discovery features are also the ones most associated directly with boosting revenue:

- Offer recommendations - **52%**
- Ability to search all content sources - **48%**
- Leveraging AI to understand user intent - **48%**



Increasing customer traffic

The survey shows that 62% of respondents connected the ability to “search across all content sources” with increased digital traffic – a result that is up significantly from 52% in 2024.

Other capabilities shown to drive customer traffic include merchandized search results that highlight high-margin or popular products (54%), personalized search experiences (53%), and the use of AI to better understand user intent (54%).

Repeat customers and improved loyalty

For 55% of respondents, a search bar that can adapt to spelling errors (typo tolerance) and use plurals and synonyms helps improve loyalty. This is a pronounced jump from 2024 where around 41% believed it was effective in this way.

Other notable features associated with improved customer loyalty are:

- Typo tolerance and synonyms functionality in search bar - **55%**
- Providing as you type results in the search bar - **54%**, up from 42% in 2024

Revenue continues to be a driving factor for search implementations alongside improving the customer journey

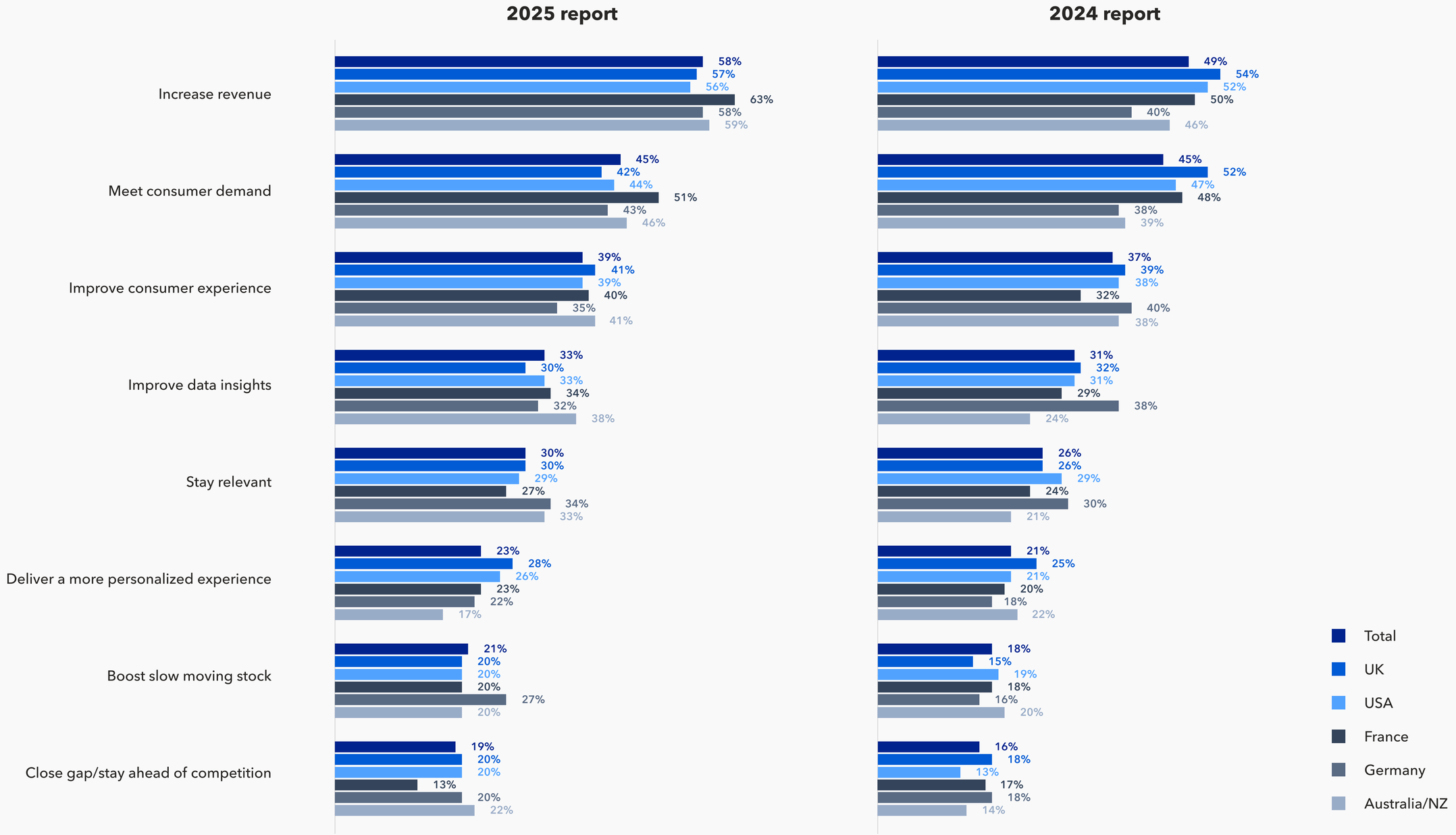
Compared to 2024, increasing revenue has grown in importance by a notable 9% points. In the US it drives 56% of implementations, while in France this factor drives 63% of B2Cs.

In addition, French companies have placed particular focus on meeting consumer demand (51%) compared to the global average (45%) in 2025.

Globally, the key business factors driving search implementations are:

- Increasing revenue - **58%**
- Meeting customer demand - **45%**
- Improving the customer experience - **39%**

Interestingly, only 16% of businesses cite staying ahead of the competition as their primary driver. Instead, the main focus for most is enhancing the customer journey and increasing revenue.


2025 report
2024 report
Increase revenue
58%
57%
56%
63%
58%
59%
49%
54%
52%
50%
40%
46%
Meet consumer demand
45%
42%
44%
51%
43%
46%
45%
52%
47%
48%
38%
39%
Improve consumer experience
39%
41%
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Improve data insights
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Stay relevant
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Deliver a more personalized experience
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Boost slow moving stock
21%
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16%
20%
Close gap/stay ahead of competition
19%
20%
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13%
20%
22%
16%
18%
13%
17%
18%
14%
Total
UK
USA
France
Germany
Australia/NZ

Search investment trends

Site search investment in 2025

When asked about changes in their site search investment over the past 12 months, companies across all regions reported a general trend of sustained or growing investment.

Globally, the average search investment is 3% higher compared to the 2024 report. In the US and Germany, the average search investment has increased by 5%, while in the UK, investment has increased by a robust 8%.

Even in the context of an increasingly eventful and uncertain macro-economic environment, the fear of missing out drives companies to make sure that site search and discovery capabilities are where they need to be.



And in the next 12 months...

The investment outlook for search for the next 12 months remains positive, although the rate of growth looks set to be slightly lower, rising by 6.9% compared to 8.8% in 2024.

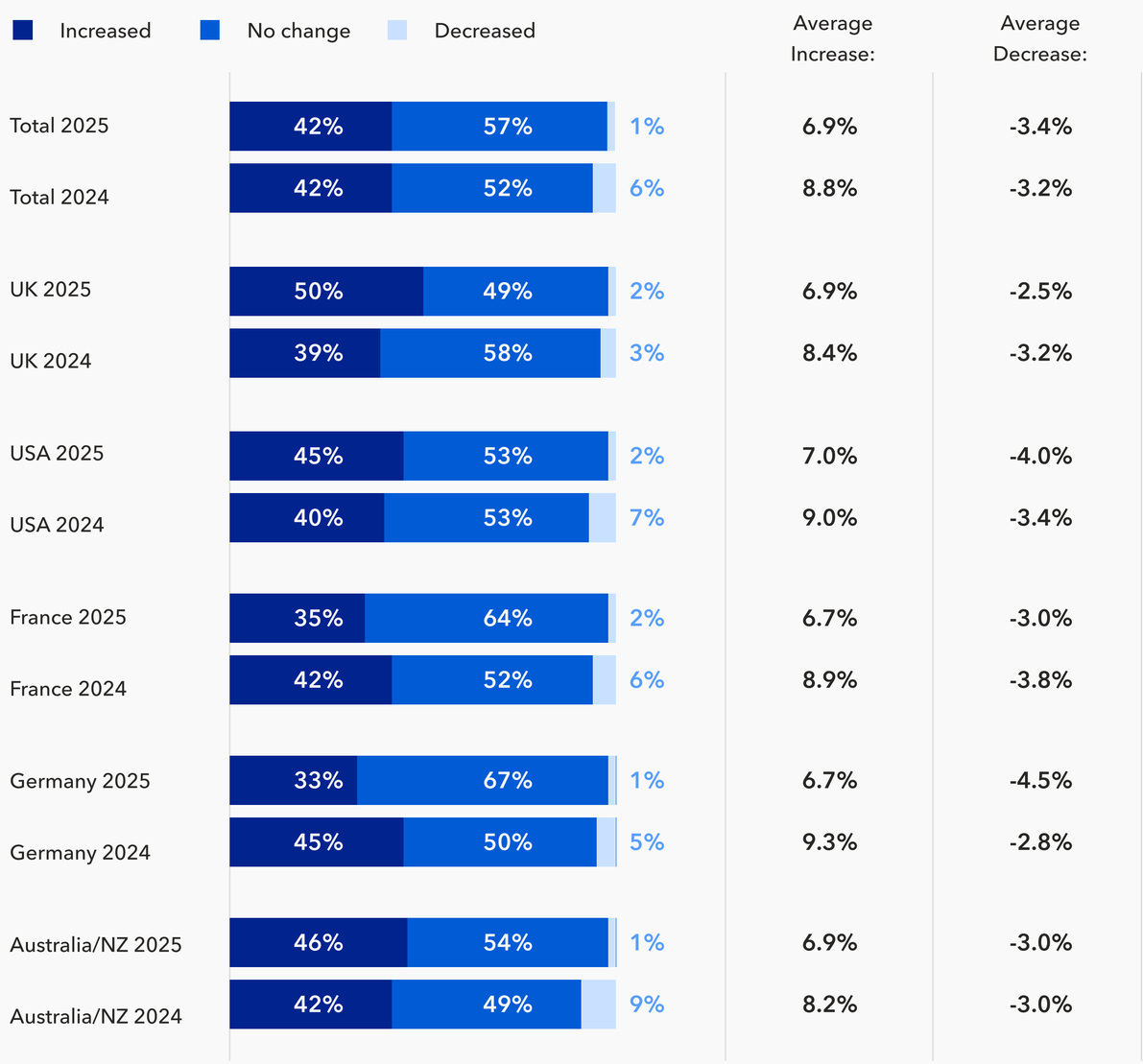
The figures suggest that the challenging macro-economic climate hasn't dampened the industry's outlook on the benefits that search and discovery investment can deliver as they move into 2026.

On average, the level of global spending is going up 42% as we look to 2026. In the UK, spending will increase 50%, up from 39% in 2024. And in the US, the trend is similarly strong with 45% of respondents looking to increase search and discovery implementations in the coming year compared to only 40% in 2024.

Nevertheless, a large number of companies (56%) are maintaining existing levels and are not planning any further major investments around search for the coming year. This is especially true for Germany (66%).

On the other hand, the projections in France, with 64% saying there will be no change in search investment levels, can be attributed in large part to the significant inputs made over the past two years.

Site search investment in the next 12 months



Customer experience is top of mind moving into 2026

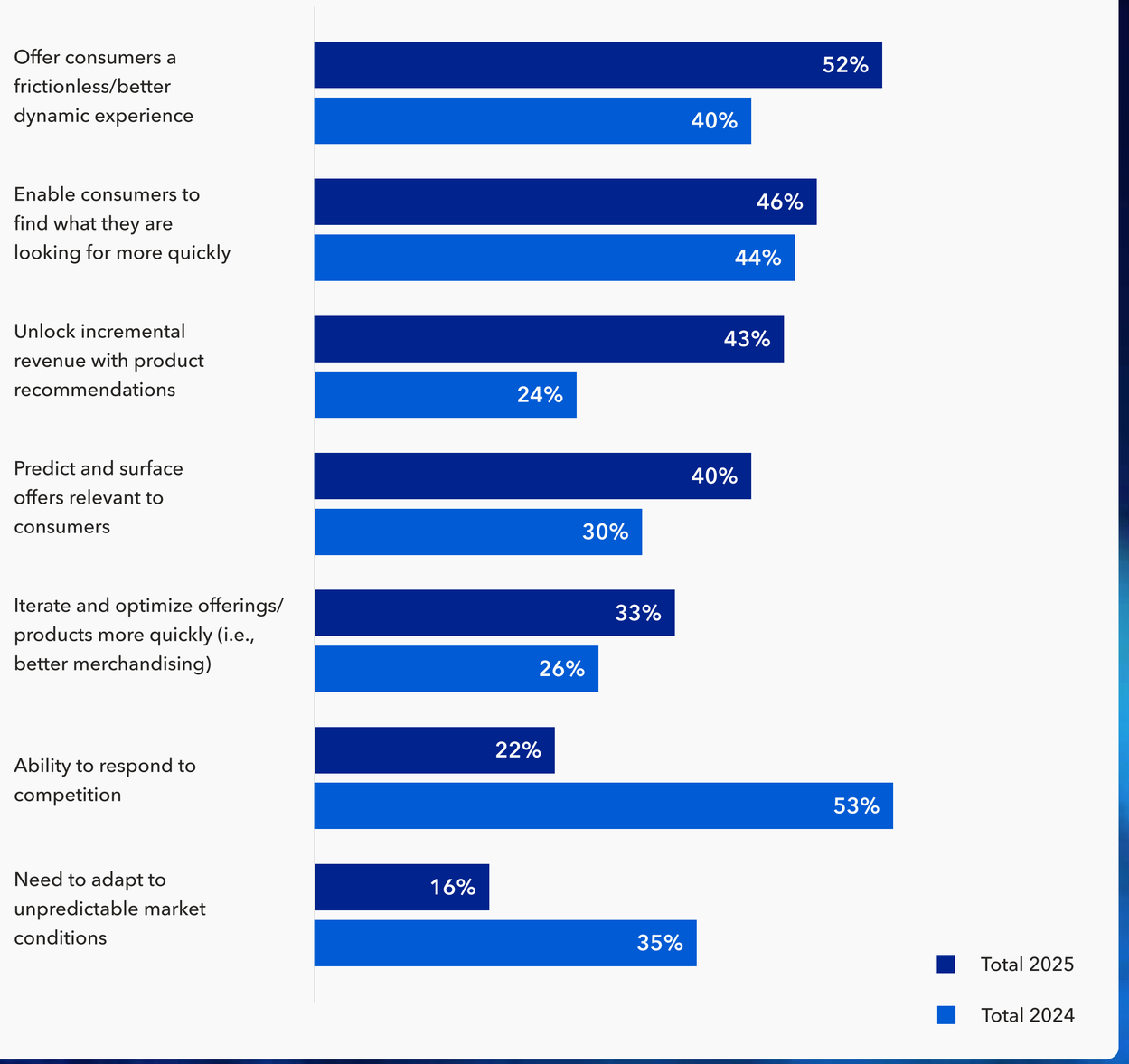
For B2C businesses, the primary reasons for increasing search and discovery investment continue to be to enhance the consumer experience and help customers find what they need more quickly. The top factor - offering consumers a frictionless and more dynamic experience - has risen in importance by 12% points from 2024.

The top three reasons for increasing search and discovery spend in this year's report are:

- Offering consumers a frictionless and more dynamic experience - **52%**
- Enabling consumers to find items - **46%**
- Unlocking incremental revenue with product recommendations - **43%**

The ability to respond to competition drops significantly as a motivator, from a high of 53% in 2024 to 22%. Nevertheless, worrying about the competition is distinct from remaining competitive; consequently, the need to iterate and optimize offerings (33%) as well as predict and surface offers (40%) follow in 4th and 5th place as key factors driving search and discovery investment into 2026 and beyond.

Reasons for the intended increase in investment



Positive about search investment outcomes

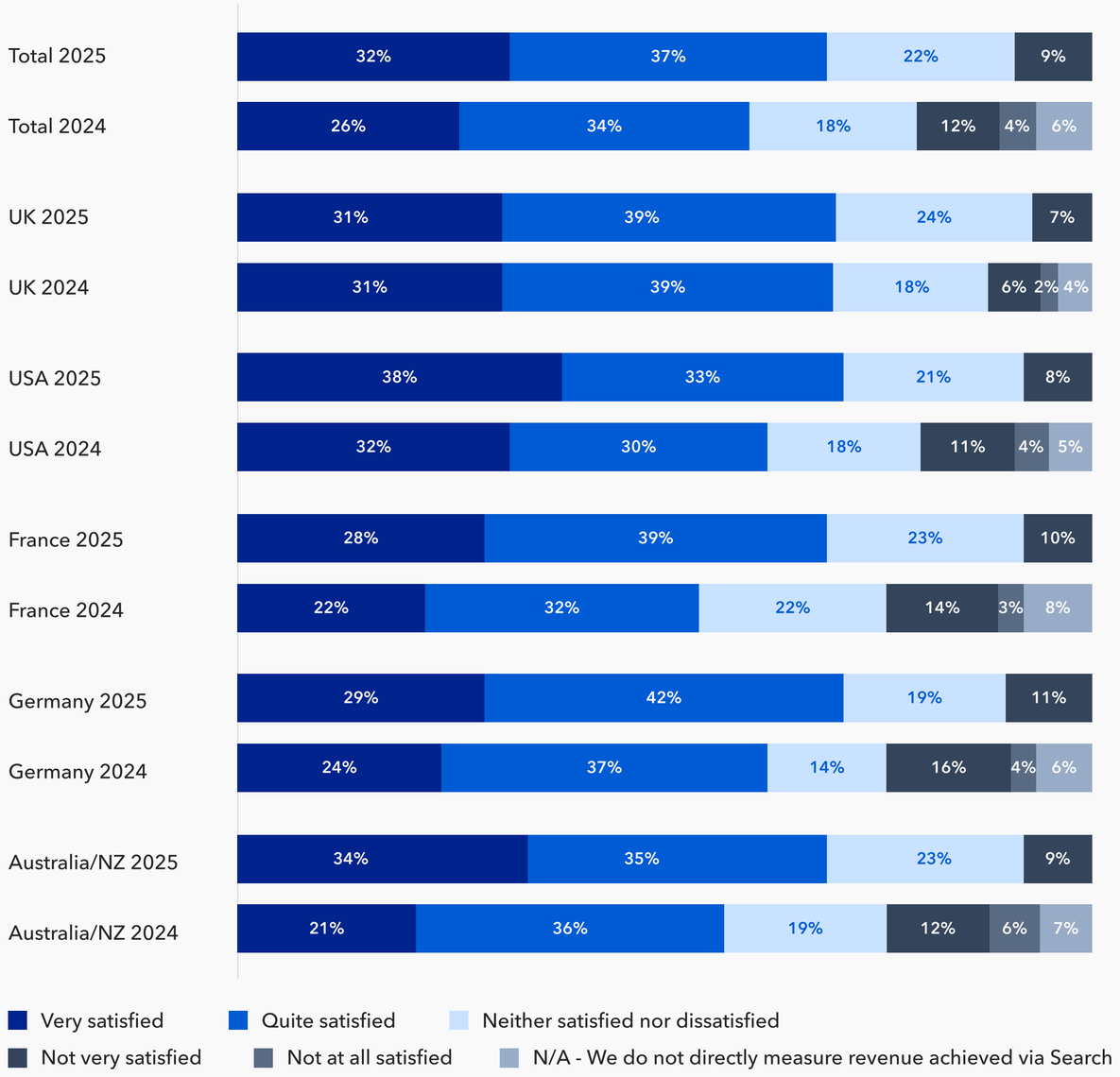
A key force behind rising search investment is the positive outcomes that B2Cs are seeing. Seven in 10 businesses worldwide report being highly or fairly satisfied with the revenue generated from their search and discovery implementations.

The results are broadly consistent, with all regions reporting that they are either "very satisfied" or "quite satisfied" with revenue outcomes:

- US - **71%**
- Germany - **71%**
- United Kingdom - **70%**
- France - **67%**
- Australia/New Zealand - **69%**

While satisfaction with revenue levels in 2025 remains high, this represents close to a 10% increase in CSAT (customer satisfaction) scores from the last report. During the same period, the number of respondents indicating they were "not at all satisfied" with the revenue generated using search dropped by 50%.

Level of satisfaction on the revenue achieved via search



Consumer search behavior

Image search, chat, or text search?

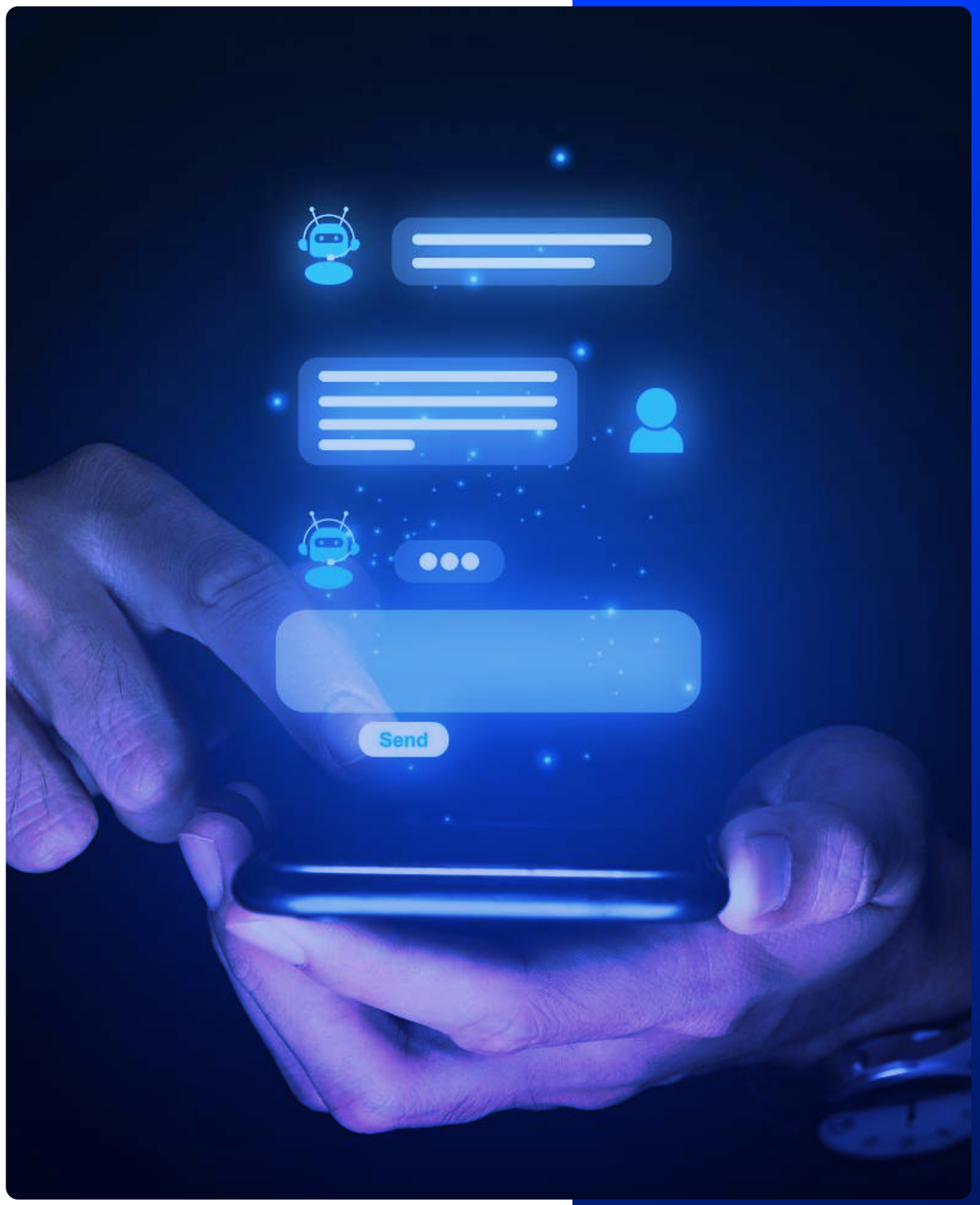
It is clear that consumers want to use all their senses (multi-modal functionality) when searching.

When respondents were asked to rank the kind of search solutions – both AI and non-AI – their customers prefer to use when searching for products online, conversational AI assistants and traditional text-based search ranked equally at 52%, closely followed by image-based search solutions at 51%.

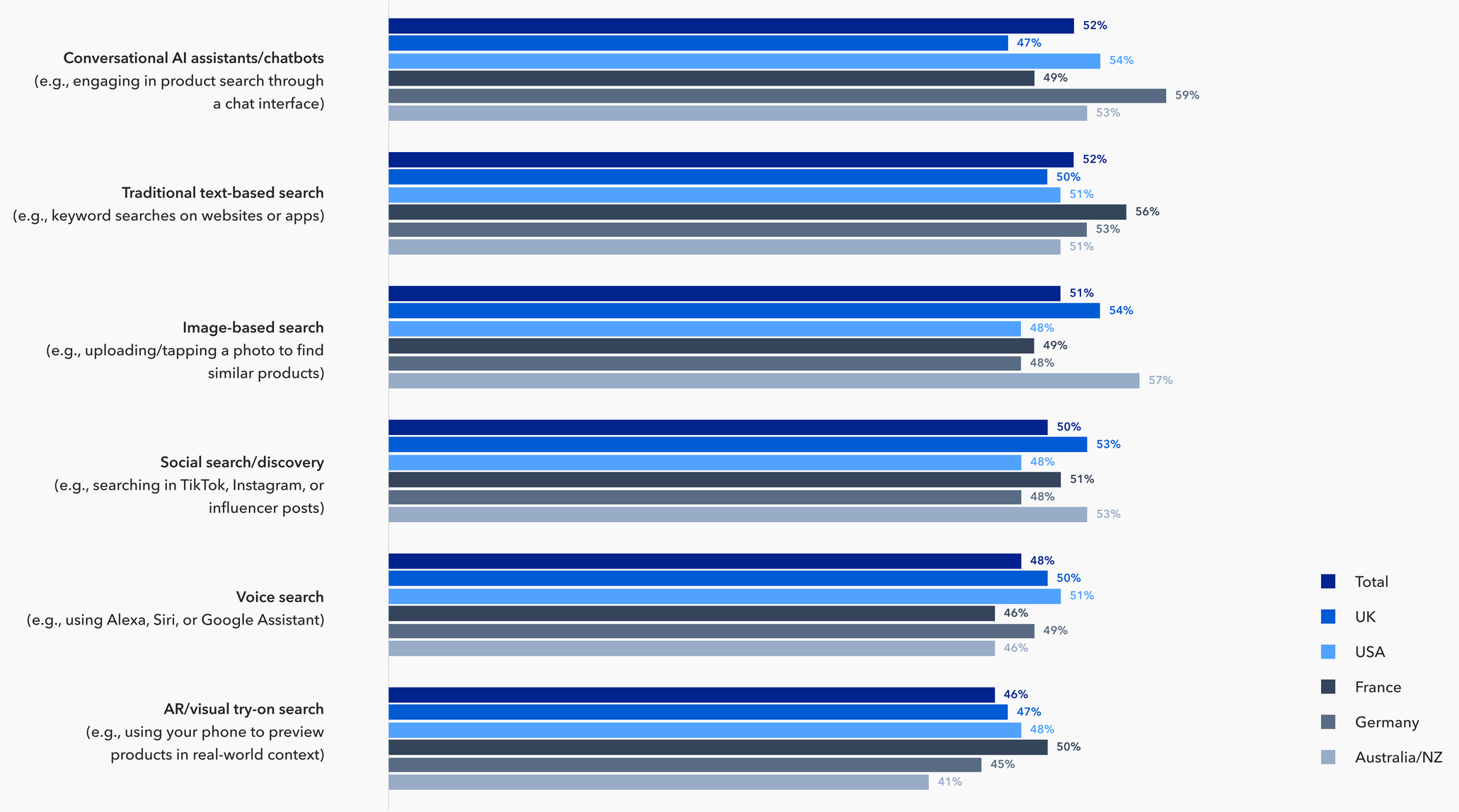
The process of uploading or tapping a photo to find similar products on an ecommerce website is an increasingly popular way for consumers to discover products and find items.

The regional breakdown offers a more detailed perspective.
In terms of being outliers, French users clearly favor text-based search, while 57% of users in New Zealand and Australia prefer image-based search.

Conversely, in the United States, voice search—using digital assistants like Alexa, Siri, or Google Assistant—ranks in the top three preferred search methods.



Consumer preference for product search



Agentic AI and gen AI in ecommerce search

AI continues to be a big deal in search. It comes as no surprise that it has been playing an increasingly important role in powering the search and discovery journey for B2Cs and their customers. The survey clearly reflects the increasing integration of AI-powered solutions as we move into 2026.

Ecommerce is now entering a new stage of AI implementation and maturity. Agentic AI capabilities are opening the way for an era of “smart” online support agents and tools that can reason and help users through critical steps in the shopping journey.

As the name suggests, agentic AI makes it easy for businesses to create intelligent agents that can interact with customers to provide specific functionality and accomplish tasks. Taking into account purchase history and past preferences, an AI agent can offer up meaningful targeted promotions, product recommendations, multi-functional capabilities, and product information.

For organizations, agentic AI opens a range of new data and automation capabilities that can deliver new insights and solutions to business and merchandising teams. Critically, these new capabilities often require minimal technical or coding expertise.

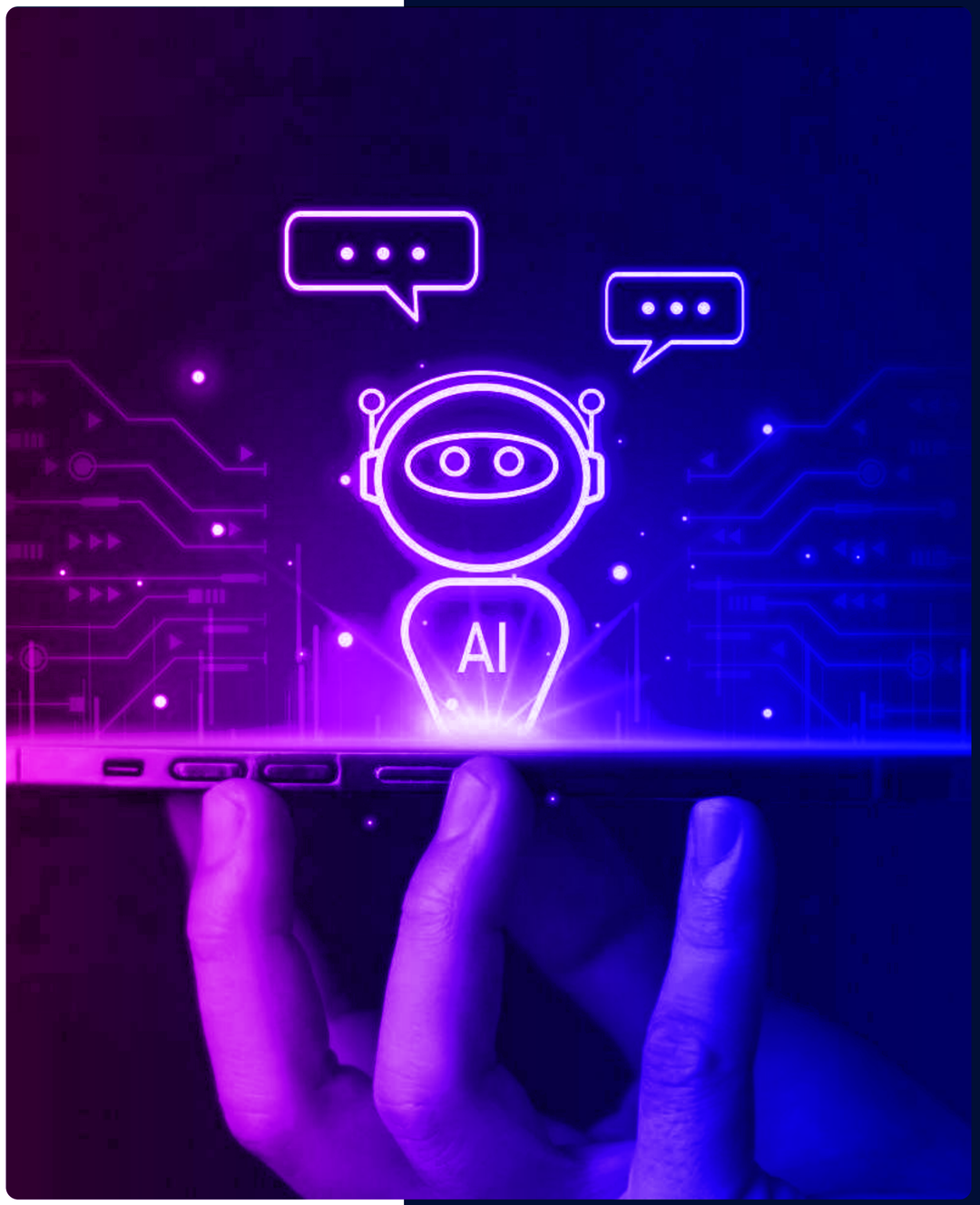
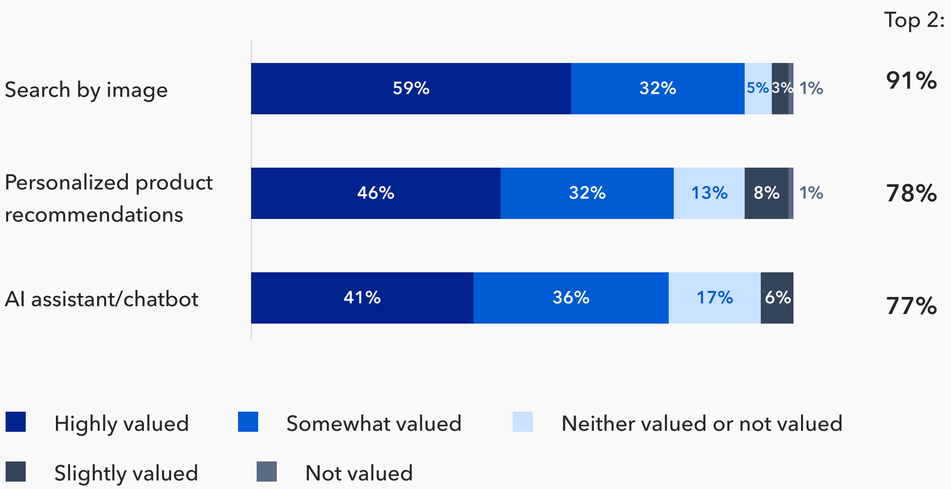


Image drives almost everything and AI drives purchase likelihood

When asked to rank the most beneficial AI-powered search solutions, respondents invariably ranked “search by image" as the most valued feature at 91%.

Tied for second place, AI-powered personalized recommendations and AI assistants or chatbots were seen as valuable by 78% and 77% of respondents, respectively.

Across all regions, results clearly show that shoppers are more likely to complete a purchase when using AI tools. On average 63% of those surveyed strongly supported this claim, with agreement ranging from a high of 68% in the United States to 57% in New Zealand and Australia.



Gen AI is a critical tool positively impacting the sales funnel - personalization, loyalty, and chatbots

Respondents are also in agreement when it comes to valuing gen AI’s importance in providing hyper-personalized recommendations as well as search and merchandising capabilities.

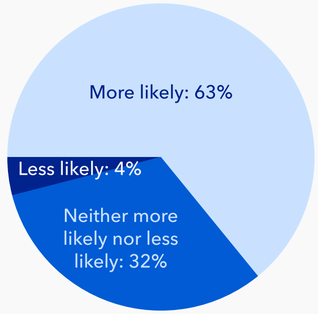
From gen AI-personalized product description to shopping guides, 9 in 10 respondents consider gen AI very or somewhat important to generating a personalized user experience for their customers and end users.

Broadly consistent across markets, the power of gen AI is also reaffirmed by the fact that 94% consider it to be very or somewhat impactful when it comes to:

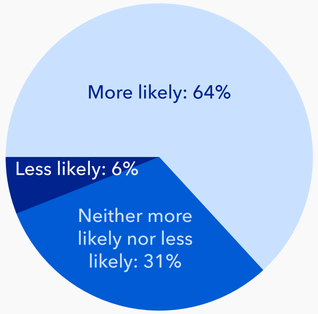
- Bolstering customer loyalty and repeat purchases
- Positively impacting purchase decisions
- Powering conversational tools that inform the purchase process

In all cases, the positive impact of gen AI shows little to minimal variance across markets and geography.

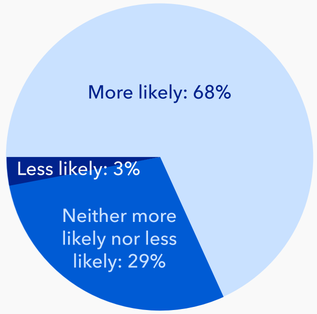
Likelihood of purchase using AI tools



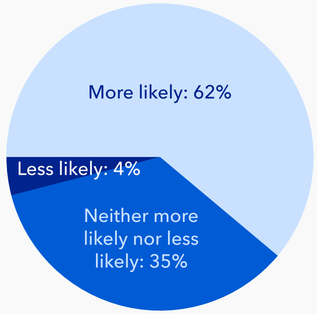
Total n=1100



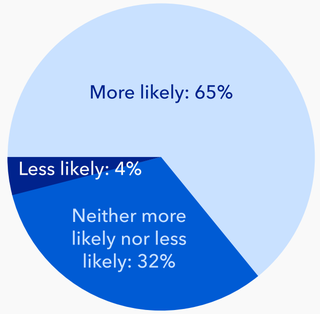
UK n=200



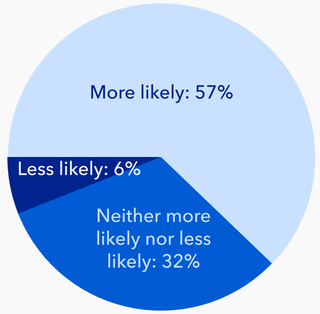
USA n=300



France n=200

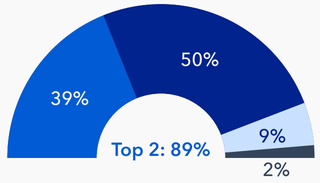


Germany n=200

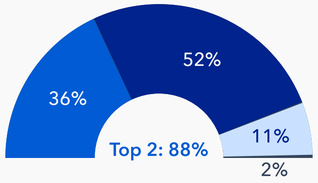


Australia/NZ n=200

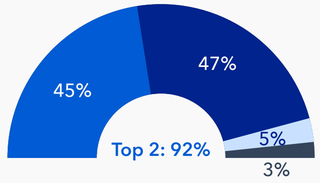
Importance of gen AI in hyperpersonalization



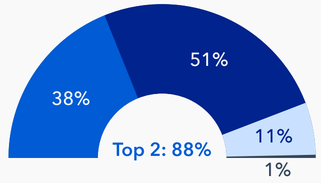
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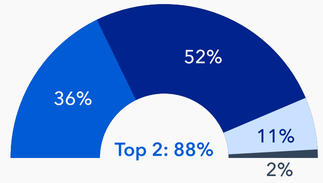
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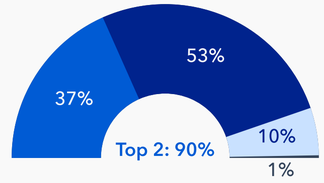
USA n=300



France n=200



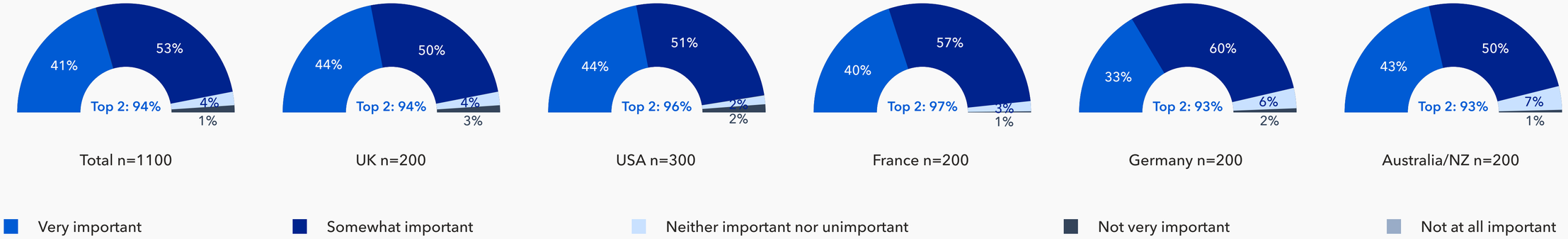
Germany n=200



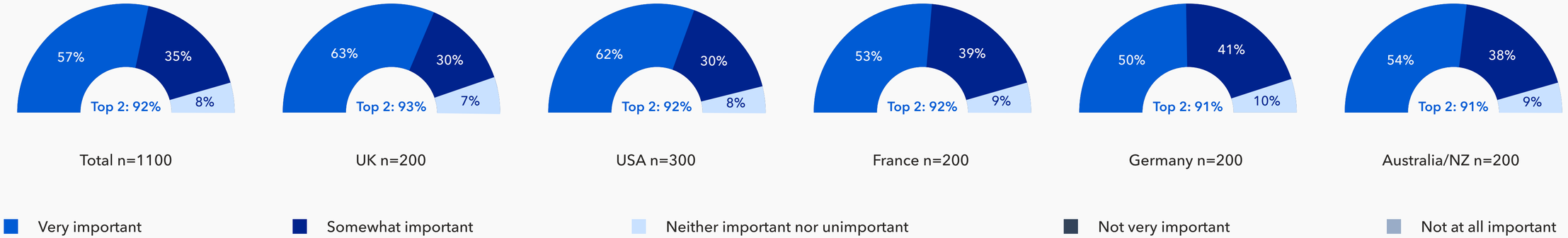
Australia/NZ n=200

Very important | Somewhat important | Neither important nor unimportant | Not very important | Not at all important

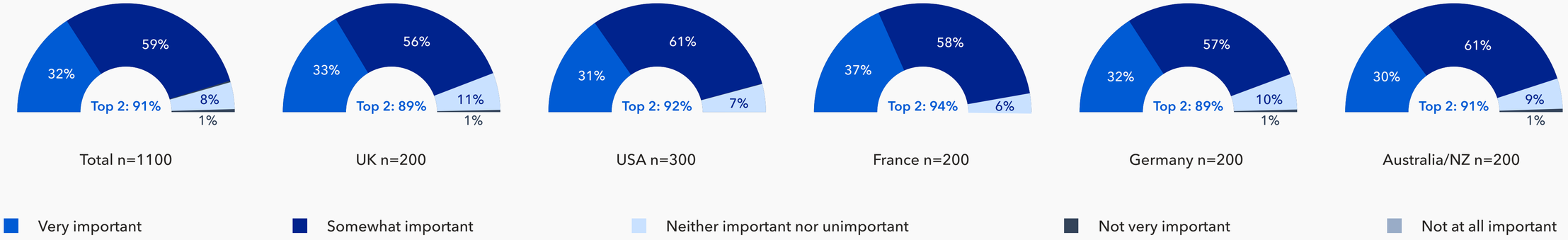
Impact of gen AI personalization on loyalty



Effectiveness of gen AI content on purchase decisions



Usefulness of conversational gen AI tools



Effectiveness of gen AI in specific tasks

As we dig deeper into a larger array of potential gen AI-supported solutions, confidence in effectiveness remains strong, but with some caveats.

Outside of review summaries (89%), complex product searches (89%), and self-service capability (88%), the sense of effectiveness begins to diminish.

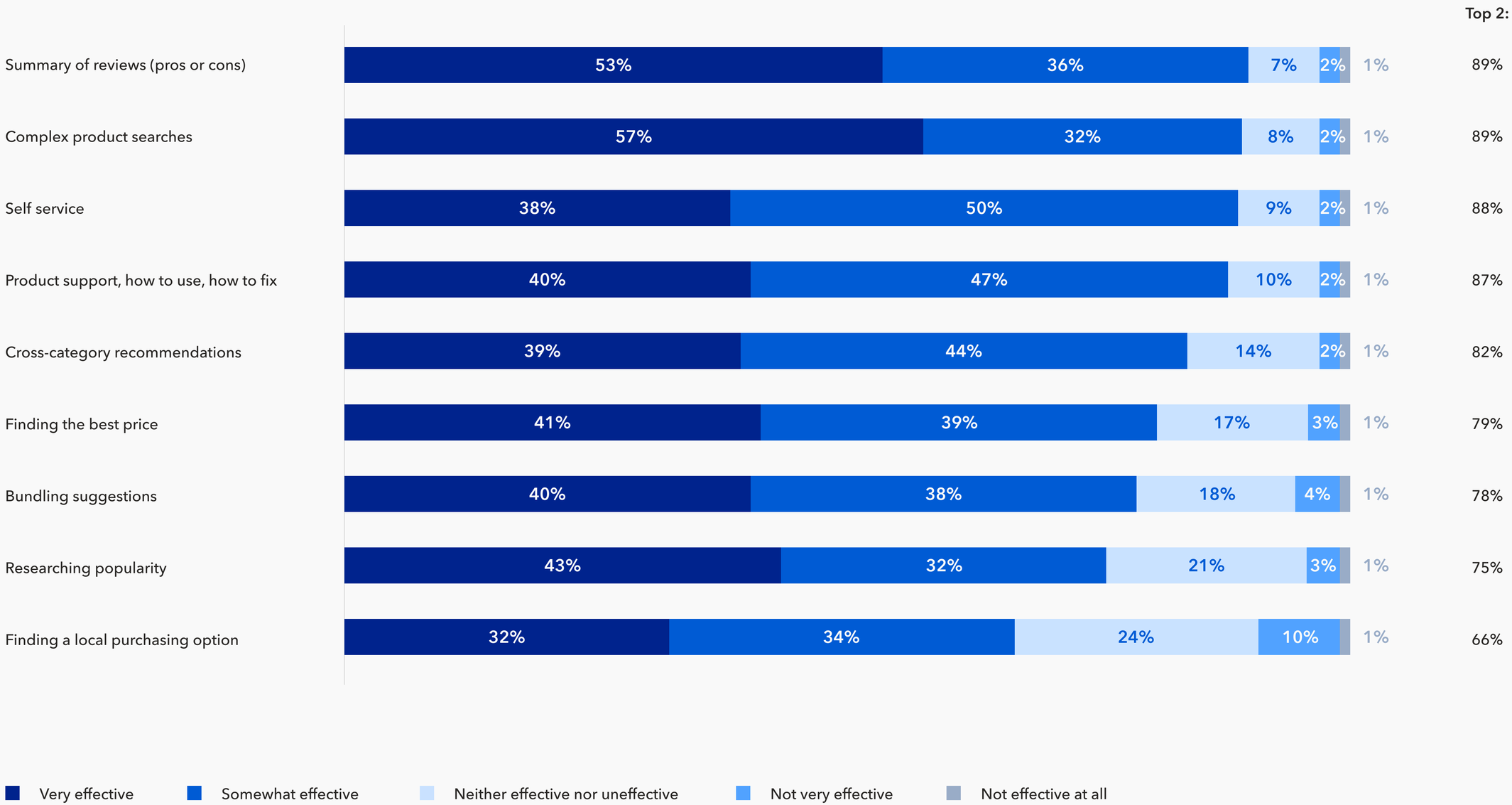
When it comes to tasks such as:

- Finding local purchasing options - **66%**
- Researching the popularity of items - **75%**
- Building suggestions - **78%**

Respondents see the benefits but clearly not at the same level as other solutions that leverage gen AI. In these instances, there is clear room for improvement.

Providers have to work on solutions for B2C users that deliver consistent and positive outcomes across the range of possible gen AI-powered solutions and implementations.

Effectiveness of gen AI in specific tasks



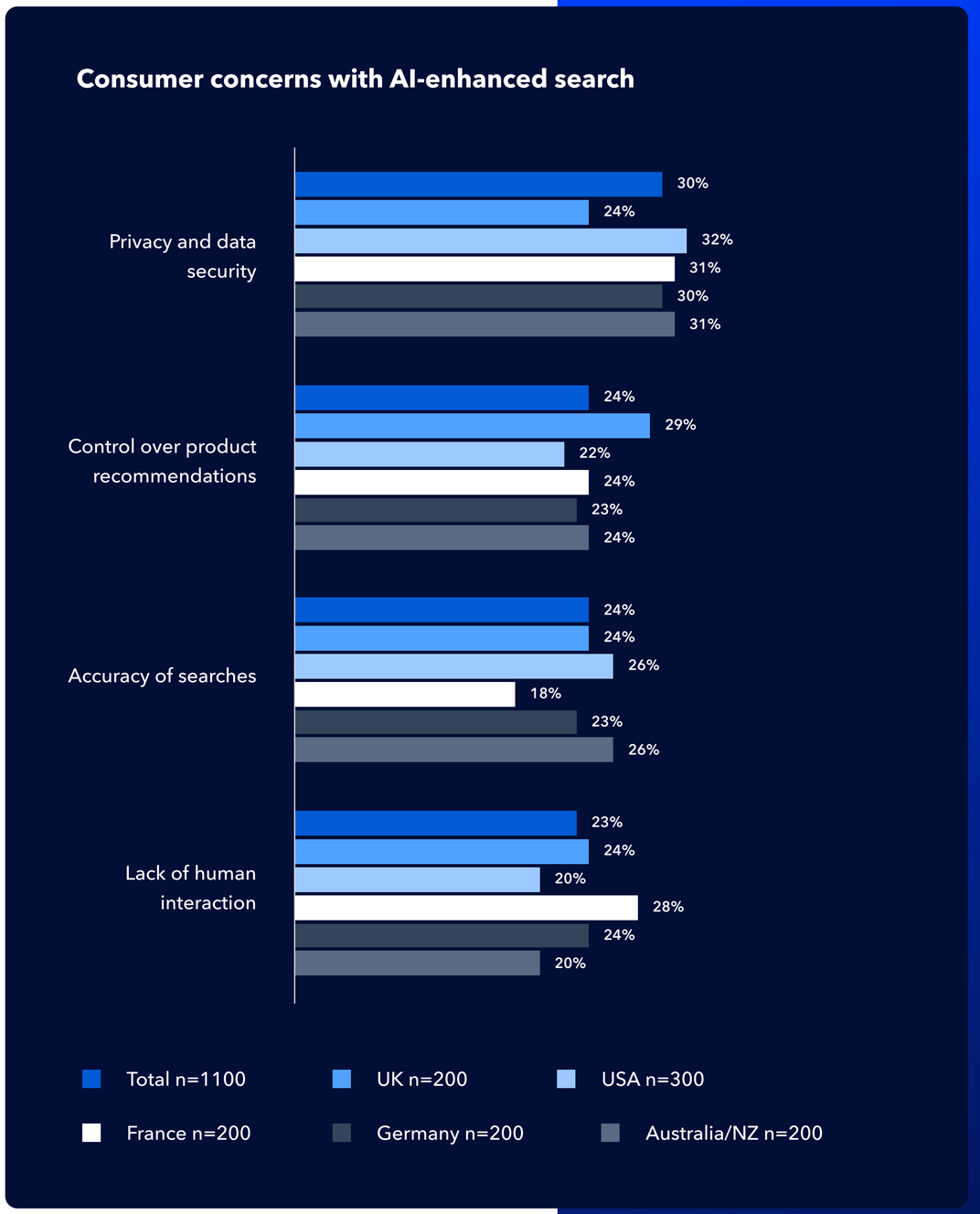
Trust, privacy and transparency - keeping customer data secure

Trust and privacy continue to be critical brand issues. In an increasingly AI-driven world, data and security breaches have consequences that extend far beyond regulatory violations such as those under the GDPR. These can severely damage customer confidence in a brand, its products, and its website – often with long-lasting and potentially devastating effects.

Respondents are well aware of the potential negative outcomes. When asked to identify what concerns consumers have regarding data privacy when using AI search, the top response was securing customer data and privacy at 30%, followed by:

- Control over product recommendations - **24%**
- Search accuracy - **24%**
- Lack of human interaction - **23%**

Though geography and market variance affect the importance of these categories to users, ensuring data security and privacy is at the top of the list across all markets surveyed.



Future outlook, innovation, and agentic AI

As the AI boom reverberates around the world, the technology has already positively transformed the B2C ecommerce search and discovery ecosystem.

Resources like Algolia AI Search provide businesses with tailored and powerful tools that deliver a range of services and capabilities to shape the customer journey and improve business outcomes.

As we move beyond 2025, new services like Model Context Protocol (MCP)-based offerings are bringing the power of agentic AI to the B2C ecosystem.

The Algolia MCP allows businesses to quickly automate complex processes and harness the power of artificial intelligence and natural language processing for multi-functional agentic offerings without the need for complex coding expertise.

A potential boon for merchandisers and business decision makers, AI offerings like the one based on technology like MCP will make it much easier to develop innovative customer-facing solutions. It will significantly reduce the real-time drain involved in analyzing numbers and spotting trends. It will also make it much easier to create intelligent tools that can generate powerful insights to assess the effectiveness of product and merchandising decisions.

Users expect a new range of future AI-powered search features

As we've already seen, gen AI-powered capabilities are valuable for users across B2C ecommerce. As new capabilities and solutions become available, the appetite for AI-powered features will only grow with greater momentum moving into 2026.

When asked which AI-powered search features do consumers want to see in the future, the top three answers are:

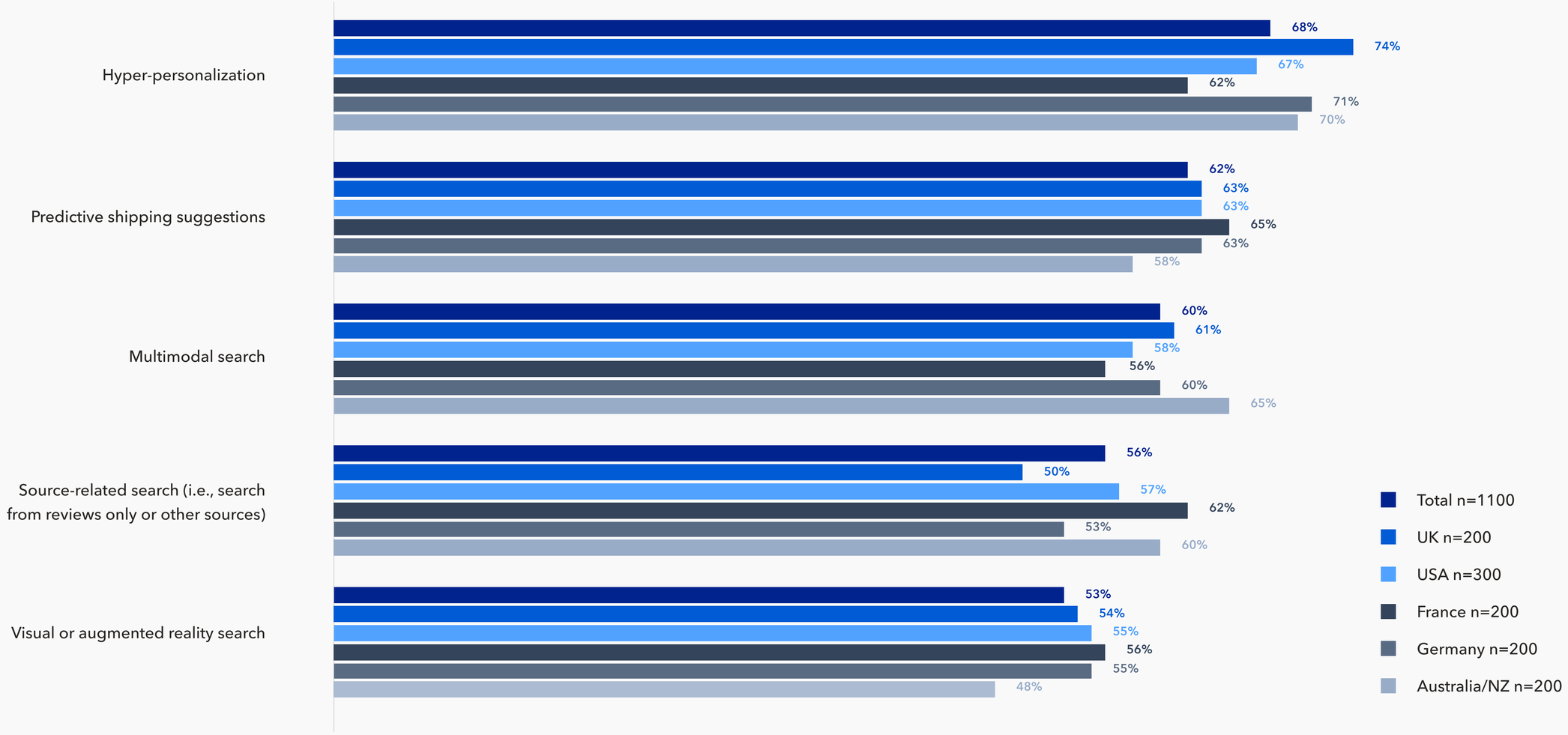
- Hyper-personalization - **68%**
- Predictive shipping suggestions - **62%**
- Multimodal search - **60%**

The popularity of the multimodal search feature emphasizes the importance of offering customers a range of ways to engage in search and discovery.In practice, this translates to making it as easy as possible for customers to upload images of what they're looking for, alongside more traditional forms of text- and voice-based search.

The high scores across different future AI-powered search capabilities reflect a strong confidence in AI search and discovery and its continued integration into the B2C space.

Along with rising consumer demand and higher customer expectations, agentic AI systems are likely to be quickly integrated and adopted into a new baseline set of features within the B2C UX and customer journey.

Future AI-powered search features organizations think consumers will want

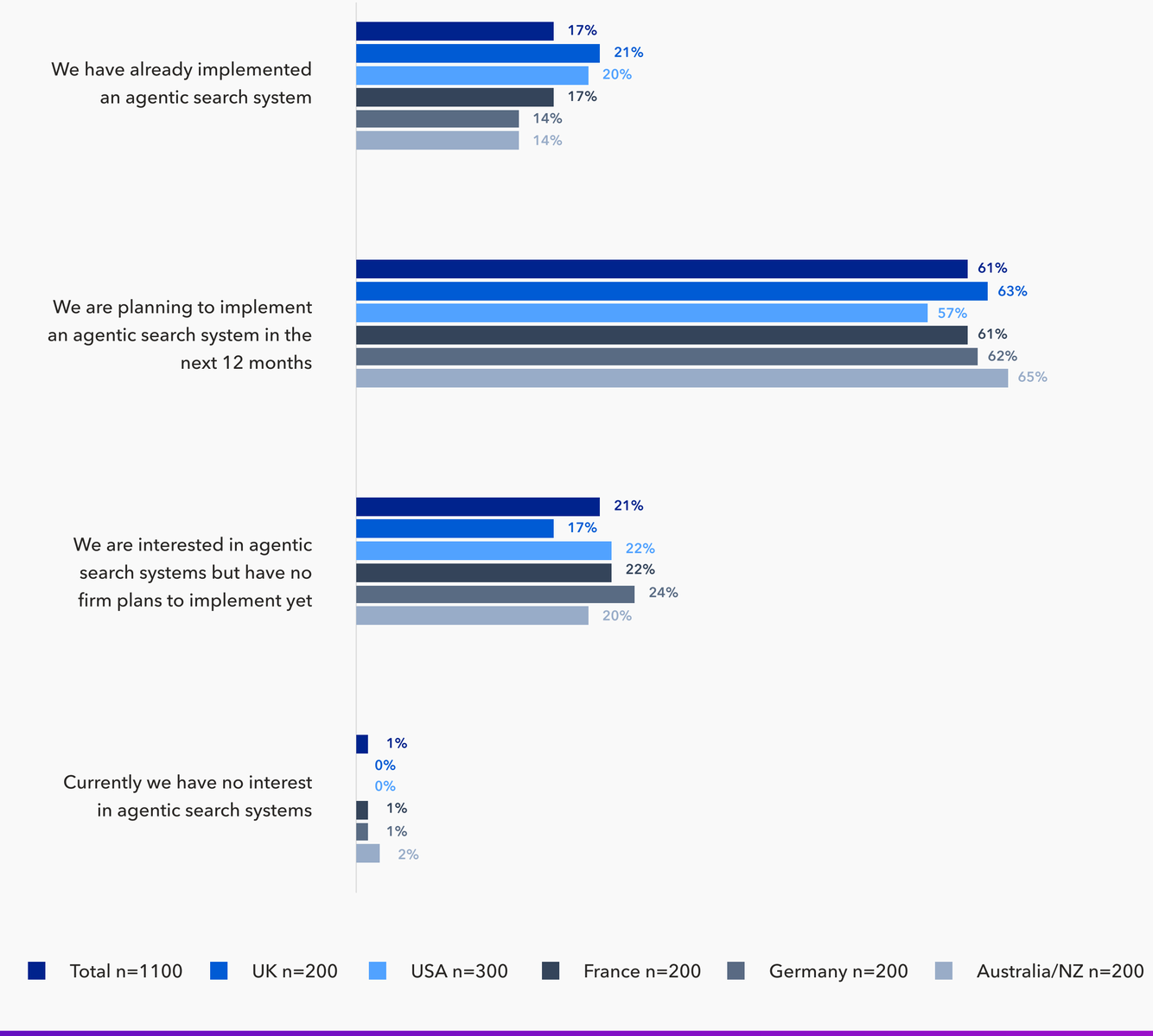


B2Cs are starting to get busy with agentic AI

Though relatively few retailers (17%) currently have agentic AI search systems in place, 3 in 5 (61%) are planning to implement in the next 12 months. Only 1 in 5 respondents indicated that they do not have firm plans for agentic AI implementations moving into 2026.

The numbers are a clear indication that B2C businesses are attuned to the possibilities opened up by the technology. Taking into account existing and intended use-cases and capabilities, we are likely to see an implementation rate close to 80% in the coming years.

Interest in agentic AI search systems

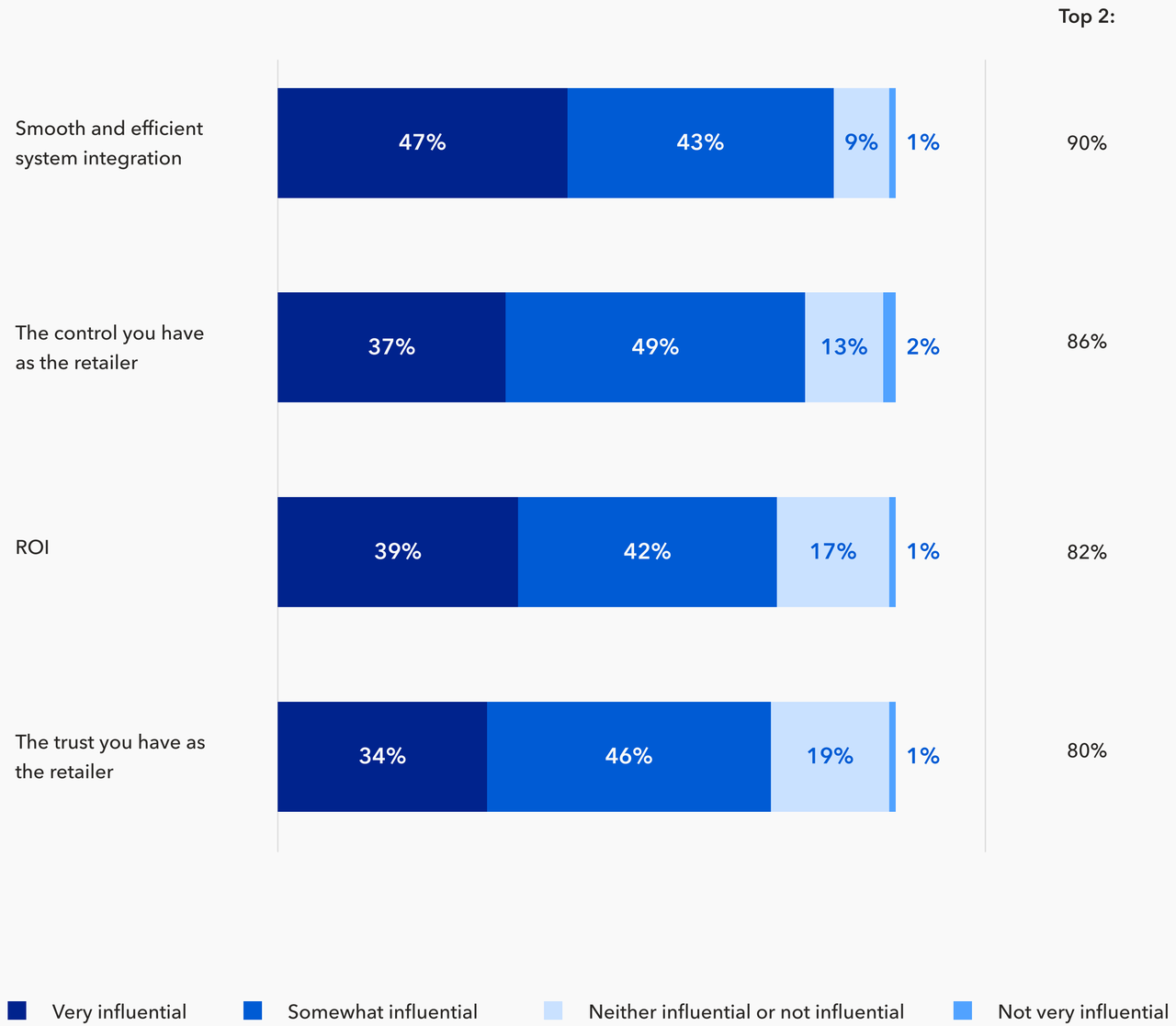


Factors influencing agentic AI adoption

Users seem to be aware of the benefits but are also concerned with some of the challenges they might encounter when it comes time to implement agentic AI capabilities.

When asked about the key factors influencing the adoption of agentic AI search systems, respondents identified three major considerations:

- Smooth and efficient system integration - **47%**
- Ensuring retailer control over technology - **37%**
- Return on investment (ROI) - **39%**



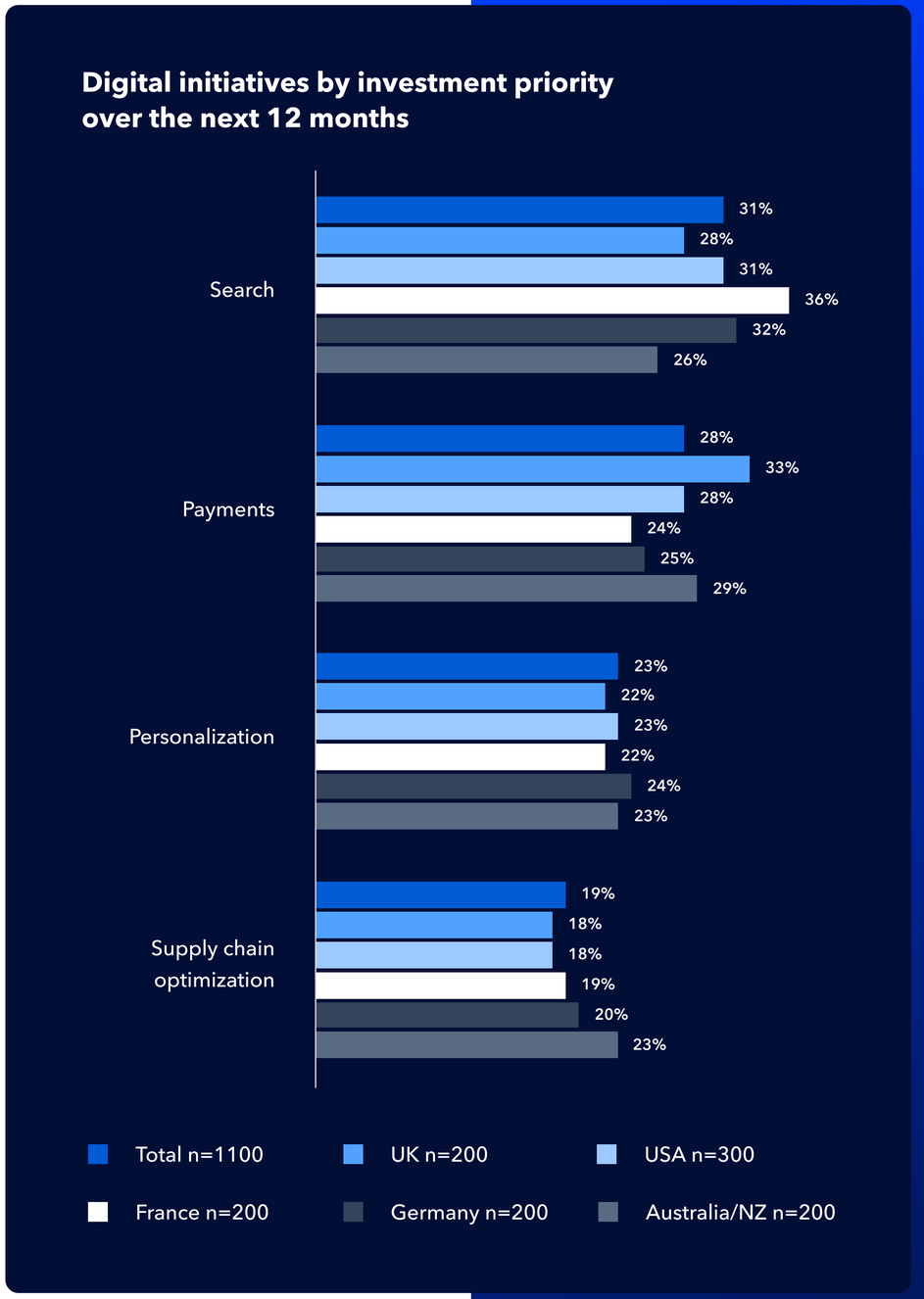
Wider digital investment and ecommerce strategy

While B2C companies have made it clear that strengthening search and discovery capabilities are important, what are some of their other investment priorities for businesses over the next 12 months?

When it comes to digital initiatives by investment priority over the next 12 months, search tops the list:

- Search - **31%**
- Payments - **28%**
- Personalization - **23%**
- Supply chain optimization - **19%**

While there is some variation, search and payments are at the top of the list across all markets. Respondents in France placed significant importance on search at 36%, more than 5 percentage points higher than the global average, while in the UK the leading investment priority is payments at 33%, also above the global average.



B2Cs show a clear preference for vertical search solutions

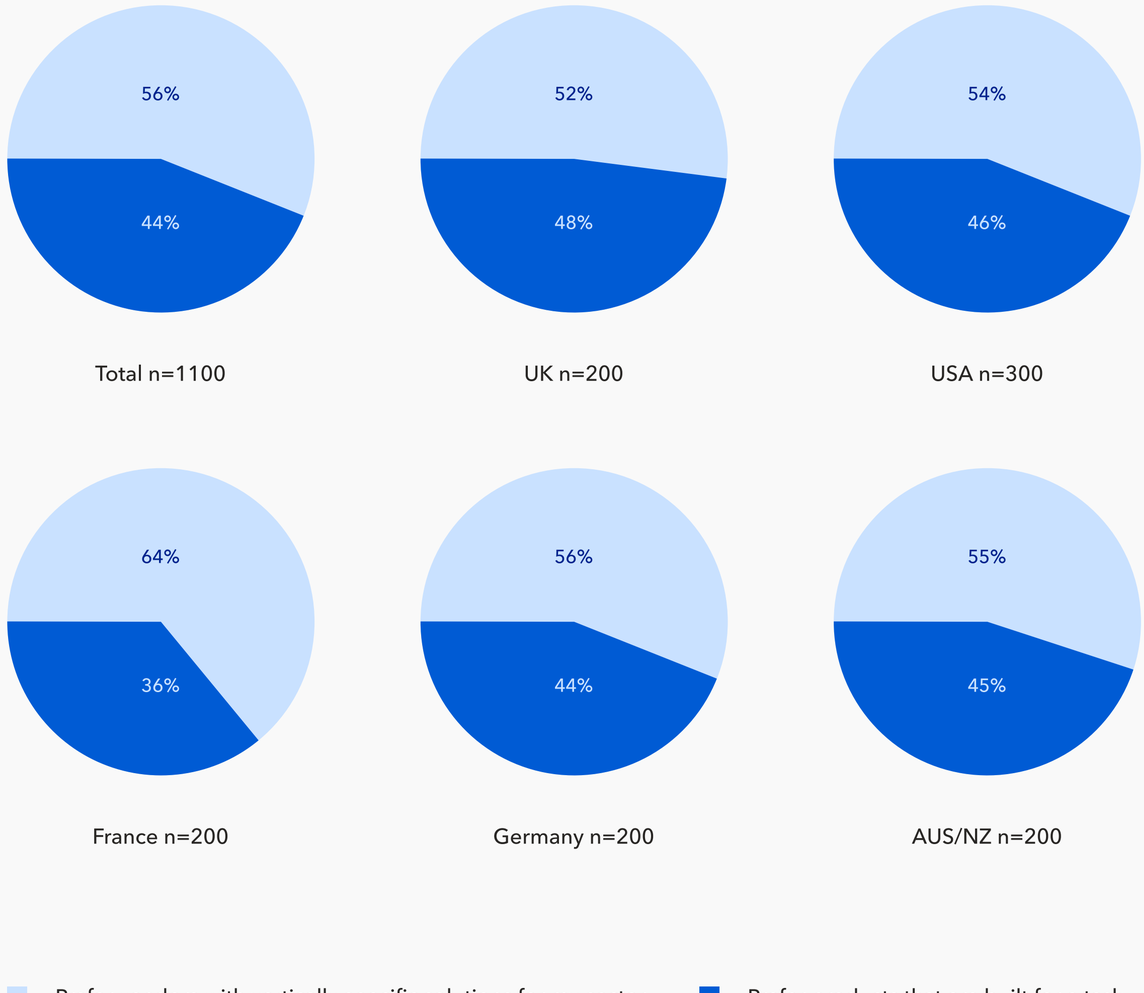
Most B2C organizations (56%) claim to be working with providers that offer vertically specific solutions adapted to their sector rather than assembling search using a variety of different products and providers (44%).

The choice is consistent across all markets, with France showing a marked preference for vertically integrated search platforms at 64%.

B2C companies are choosing vertical search solutions like Algolia AI Search that can offer quick to market API-based search and discovery. These features are not only easy to implement, but they also provide a turnkey solution.

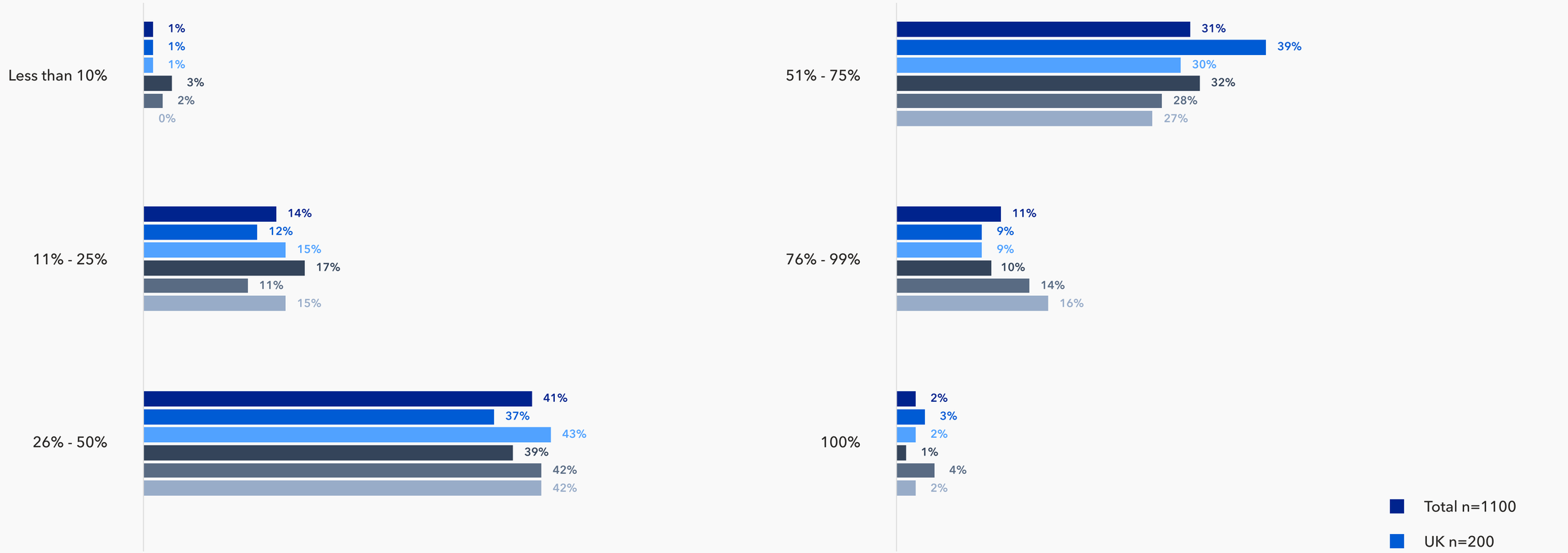
This also offers a way to offload the high cost and complexity of keeping up in the fast-moving AI technology space by relying on dedicated teams at the leading edge of AI search development, implementation, and integration.

Vendor type preference



Search relevance

Percentage of relevant search results



	Total	UK	USA	France	Germany	Australia/NZ
Average:	49%	51%	48%	47%	51%	50%

Sale events are the most popular strategy for overstock inventory

When it comes to search relevance, only 50% of respondents claim that results are meaningful to end users and customers. On the face of it, this may appear underwhelming. However, given the fact that 45% of respondents describe their business's level of investment in 2025 as non-existent or negligible, the results should not come as a surprise.

Delivering the kind of search and discovery solutions that customers expect and that businesses need to remain competitive is no longer an afterthought. Search and discovery are integral to ecommerce, particularly in the B2C space. Delighting customers and delivering meaningful customer journeys remains the key to ROI and conversions—and AI-powered search is the enabler.

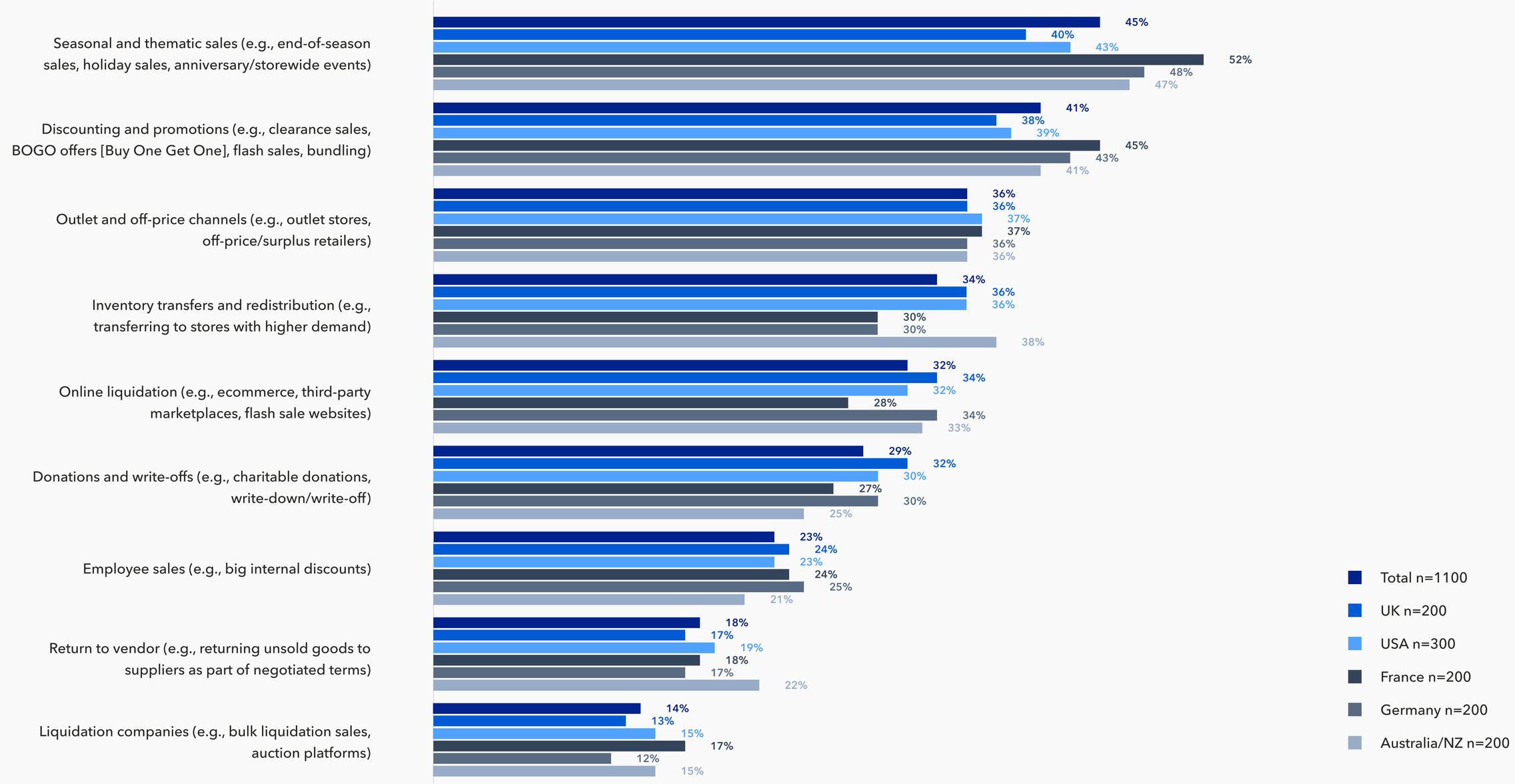
Within the wide range of possible campaigns that B2C businesses can run on their platforms, the most commonly employed sales strategies are seasonal and thematic sales, such as end of season, store wide, or holiday event sales:

- Seasonal and thematic - **45%**
- Discounting and promotions - **41%**
- Outlet and off-price channels - **36%**

The utility of these different strategies is relatively consistent across markets. Inventory transfers, redistribution and online liquidation show some variance across geographies but overall remain less popular than the top three options.



Strategies for overstock/additional inventory



Retail expertise is integral even when AI is important

On average, 45% of B2C companies employ AI-enabled or automated shopping experiences for a quarter to one-half of online shopping journeys. When it comes to the majority of their sales (76% to 99%), only 8% of B2C organizations are adopting a fully automated strategy.

Survey responses seem to suggest two things moving forward:

1. Certain business segments and processes such as logistics, payment processing, shipping processing and search recommendations seem better suited to high levels of AI-powered automation.

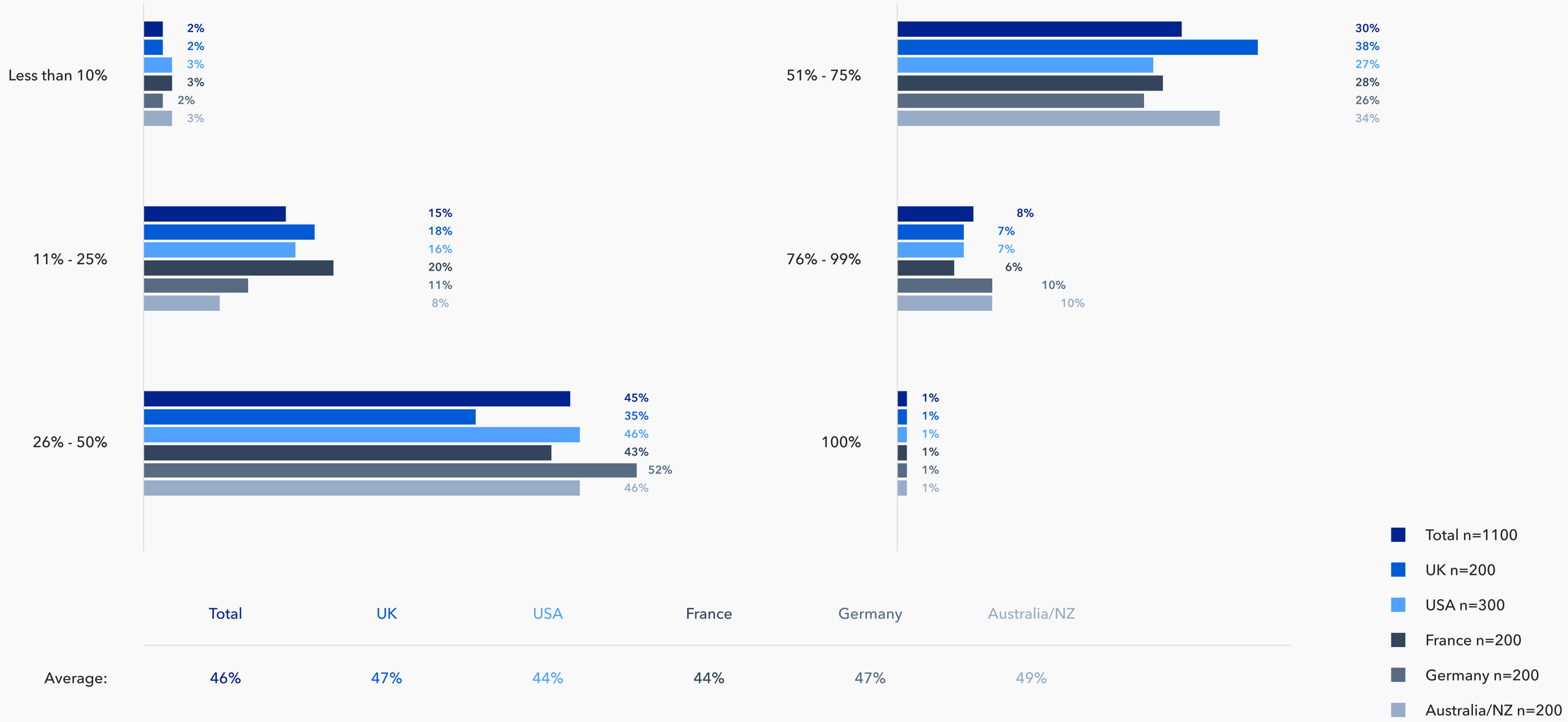
2. Relying solely on AI tools and automation is not the route most B2C companies are choosing to take. For many retailers across segments, the role of merchandising and sales teams remains critical.

Tools like agentic AI can empower business teams and their customers with advanced capabilities and powerful insights. However, the art and science of B2C retail e-commerce goes beyond automation – it is about crafting compelling brands and memorable customer experiences.

Integrating the human element is essential. Success lies in understanding the customer and leveraging search and discovery tools to create meaningful, engaging user journeys that truly delight, generate ROI, conversions and loyal return shoppers.



Percentage of automated/AI enabled shopper experience



	Total	UK	USA	France	Germany	Australia/NZ
Average:	46%	47%	44%	44%	47%	49%

Conclusion

Delivering the kind of search and discovery solutions that customers expect and that allow businesses to remain competitive is critical to B2C success.

AI-powered capabilities have proven valuable across B2C ecommerce, with consistent demand across markets and regions. As new solutions like agentic AI emerge, interest in AI-driven features will continue to accelerate heading into 2026.

The 2025 B2C Ecommerce Site Search Trends report paints a picture of a rapidly evolving landscape. B2C brands are making bold investments in search and agentic AI not just to keep pace but to lead in a market where customer expectations are constantly rising.

The combination of smarter AI, stronger personalization, and a relentless focus on customer experience is setting a new bar—one that forward-looking organizations are already preparing to meet.

From creating new baseline standards for customer interactions to using agentic AI to enable merchandisers with data and solutions, the future of search and discovery continues to be oriented toward meeting customer expectations with innovative solutions.

As we head into 2026, brands that can integrate intelligent technologies while keeping human insight at the center of their strategies will be best positioned to win the loyalty of tomorrow's consumer.

The future of ecommerce is here. It is intelligent, intuitive, and built around the shopper.

About Algolia

Algolia is the leading AI search and retrieval platform, powering 1.75 trillion searches a year for over 18,000 businesses and millions of developers worldwide. Renowned for its developer-first, API-first design and the fastest AI search technology (combining keyword, vector-based NeuralSearch, rules, and personalization). Algolia is the largest hosted search engine available today. Backed by more than a decade of innovation, Algolia delivers end-to-end AI search capabilities, from powering Retrieval-Augmented Generation (RAG) to enabling LLM-powered applications through its MCP server and new products like AskAI and Agent Studio. With unmatched speed, scalability, and simplicity, Algolia continues to redefine how businesses and developers build intelligent, trustworthy experiences.

Learn more at algolia.com