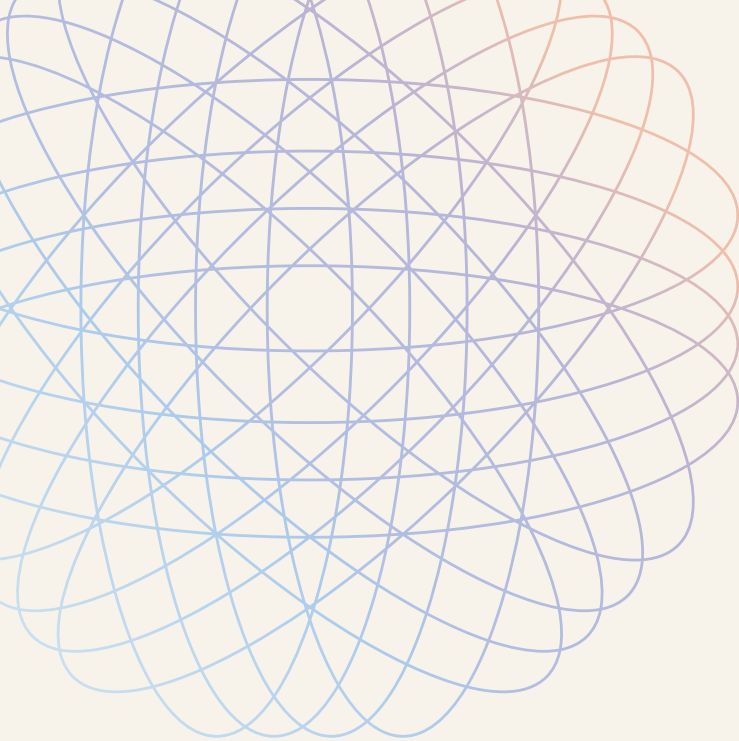




The State of Ecommerce



A comprehensive look at how shoppers buy online



Published September 2025

Executive Summary & Key Findings

If we had to sum up the ecommerce shopper journey in 2025 with a single phrase, it would be non-linear.

This year's survey results show that shoppers flow across discovery, evaluation, and decision-making in overlapping ways — blending search, social media, generative AI, personalization, and trust signals as they advance toward a purchase.

To unpack how shoppers navigate this complexity, [Constructor and Shopify surveyed more than 1,500 consumers in the United States and Europe](#). Respondents represented a balanced mix of online shopping behaviors, income levels, and generational cohorts (see About the Survey for details).

Even a few years ago, most online shopping journeys followed a recognizable pattern: start with a Google search, click through one or two retailer sites to compare, make a choice, and check out. It wasn't perfectly linear, but it was predictable. In 2025, that journey still exists — but new pathways are reshaping the landscape.

A first spark might now come from TikTok or Instagram, or even from a generative AI tool like ChatGPT. From there, expectations are higher: shoppers assume a retailer's site can interpret their intent, refine results quickly, and surface only the most relevant products. At checkout, they expect saved payment methods, one-click speed, fast delivery, and transparent returns as table stakes.

The result is a path that still echoes the past but is becoming faster, more fragmented, and far less forgiving.

The report findings reflect these changes, revealing a landscape where shoppers expect speed, relevance, and clarity — and defect quickly when their needs are not met. Yet the onsite experience continues to lag in delivering against those expectations. Despite years of investment:

- **68% of shoppers say retailer search still needs an upgrade,** unchanged from 2024
- **66% admit that in rage-quit moments, they turn to Amazon,** underscoring its role as the competitor that “just works”

The ways shoppers begin their journeys are evolving, as device context and social platforms take on greater influence alongside traditional pathways. **Apps and social-first discovery** are popular with Gen Z, while Boomers lean on browser-based search. TikTok and Instagram increasingly act as the spark that sets a mission in motion, often redirecting intent to Amazon or retailer sites.

Shoppers also want help narrowing choices, but many retailers still fall short. **41% of shoppers say their favorite retailer treats them like strangers**, and only 20% believe they frequently see personalized results. Irrelevant sponsored listings and intrusive ads often make matters worse: nearly half of shoppers find retail media annoying, and almost one in four would pay to avoid ads altogether.

Against this backdrop, Generative AI is raising the bar: **64% of shoppers have tried it** (up from 51% last year), and 58% say they are comfortable with AI-assisted discovery. Shoppers increasingly expect it to cut through the noise and surface options that truly fit.

Shoppers’ final steps depend on **trust and efficiency**. Reviews, shipping costs, and delivery dominate purchase confidence:

- **67%** identify reviews as the top trust signal
- **62%** abandon due to high shipping costs
- **51%** abandon due to long delivery times

Taken together, the journey in 2025 shows that **loyalty is fragile**, and shoppers move fluidly across channels and stages. The **retailers that win will deliver exceptional, context-aware experiences at every step** that anticipate shoppers’ needs without friction or noise.

Key Takeaways

- **Ecommerce search is still broken.** 68% of shoppers say site search needs an upgrade (flat YoY), and 66% admit defecting to Amazon when results disappoint
- **AI is moving from hype to habit.** 64% have tried GenAI (up from 51% last year); 58% are comfortable using it for shopping
- **Social shopping is universal; preferred platforms vary.** While platforms like TikTok have become core entry points for Gen Z, Facebook and Instagram are preferred among Millennials and Gen X
- **Shoppers want speed and clarity.** 55% would pay more for the right item to avoid scrolling through several pages of results
- **Personalization gaps persist online.** 41% of shoppers feel like strangers to their favorite retailers; only 20% see frequent personalization
- **Irrelevant retail media risks shopper trust.** Half are cautious or critical of sponsored listings, and 25% would pay to avoid them
- **Trust and efficiency decide the sale.** Shoppers look to reviews, return policies, delivery clarity, and easy checkout to make their final decision

Table of Contents

6	The Product Discovery Journey in 2025
7	Define: Shoppers Beginning Their Mission
	Search as the Foundation
	Mobile and Apps
	Social Media as a Discovery Engine
	Future Outlook: The Battle for the Starting Point
12	Refine: Shoppers Narrowing Down Options
	The Personalization Gap
	AI as a Guide
	Retail Media & Sponsored Listings
	Offsite Influence: Social Ads & Email
	Future Outlook: The Trust-Driven Middle Funnel
20	Decide: Shoppers Finalizing a Purchase
	Trust Signals
	Checkout Friction
	Future Outlook: From Checkout to Confidence Loop
23	About the Survey

The Product Discovery Journey in 2025

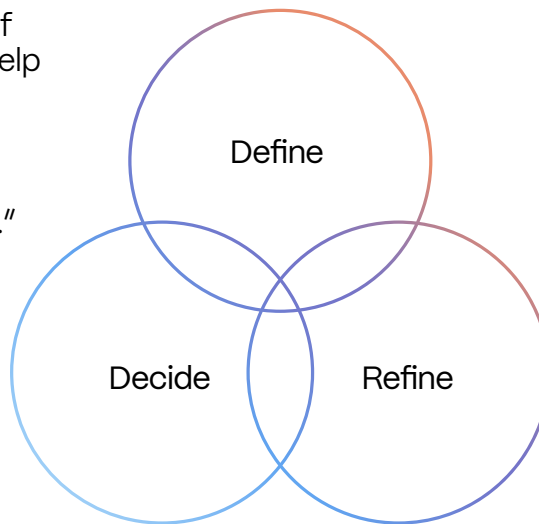
Today's ecommerce journey follows no straight path.

Shoppers shift in and out of discovery, evaluation, and decision modes, drawing on whatever tools and signals feel most useful to them at each step. To understand how these moments unfold, this report organizes those dynamics into three imperfect and increasingly overlapping phases of the product discovery journey:

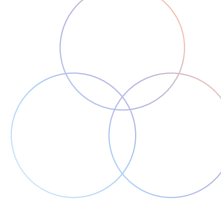
Define — "I have an idea or goal in mind, but I don't know what type of product I need. Please help me."

Refine — "I know the type of product I want, but I need help choosing."

Decide — "I have a specific product in mind. Help me confirm it's the right choice."



This framework highlights the points where retailers succeed or fail in helping shoppers progress toward purchase — and reveals the opportunities for building long-term loyalty.



Define: Shoppers Beginning Their Mission



"I have an idea or goal in mind, but I don't know what type of product I need. Please help me."

The earliest stage of the product discovery journey is about orientation. Shoppers begin with some sort of intent in mind — like buying a gift, solving a problem, replacing an item, or simply passing the time — but may lack clarity on where to begin. In these moments, the varying entry points available, like search engines, LLMs, social media, or retail sites, play a major role in steering the journey forward.

The starting point is increasingly contested, and retailers must be competitive not only on their own sites, but wherever intent begins:

- Google remains the single most common entry point (84% of shoppers say they begin product searches there)
- 63% of shoppers start on Amazon
- 23% say they start directly on brand or retailer sites
- TikTok (25%) and LLMs like ChatGPT (13%) are emerging discovery engines, particularly for younger shoppers

And now, a new player is entering the race: AI agents.

Already, 13% of shoppers say they begin product discovery with large language models like ChatGPT, and early experiments with retail-specific agents from Amazon and Walmart are accelerating adoption.

These tools promise to collapse the gap between defining a mission and refining it, both helping the shopper identify what they need and instantly narrowing options in a conversational flow. While still nascent, their presence at the earliest stage signals how quickly discovery habits can shift once convenience is redefined.

Search as the Foundation

Search remains a critical pillar of the onsite experience — and also the most fragile. More than two-thirds of shoppers (68%) say retailer search needs an upgrade, and 66% abandon directly to Amazon when results fall short. Over half (55%) even say they would pay more for a product if the discovery experience were streamlined and smoother.



What makes this fragility more concerning is its persistence. The share of shoppers calling for better site search is virtually unchanged year over year (68% in both 2024 and 2025). In other words, search is treading water — and shoppers notice.

The stagnation is most visible at the top of the funnel, when intents are more vague and shoppers are in “discovery mode.” A query like “comfortable shoes for standing all day” could, depending on the individual, map to running sneakers, cushioned flats, or even orthopedic insoles. Yet most ecommerce search engines struggle to connect the dots between what a shopper means and what’s in the retailer’s catalog, leading to irrelevant results and fast exits.

It is unsurprising, then, that an overwhelming majority (86%) of shoppers admit they must reformulate queries at least sometimes just to surface relevant results. Each attempt signals declining confidence in the retailer’s ability to help. For some, this ends in abandonment; for others, it cements the perception that Amazon “just works” in ways retailer search does not.

The frustration runs deep: 40% of shoppers say they would rather endure unpleasant real-world experiences — like waiting at the DMV, sitting in traffic without A/C, or even a bad blind date — than scroll through pages of irrelevant search results (in some cases as high as 53% depending on the experience).

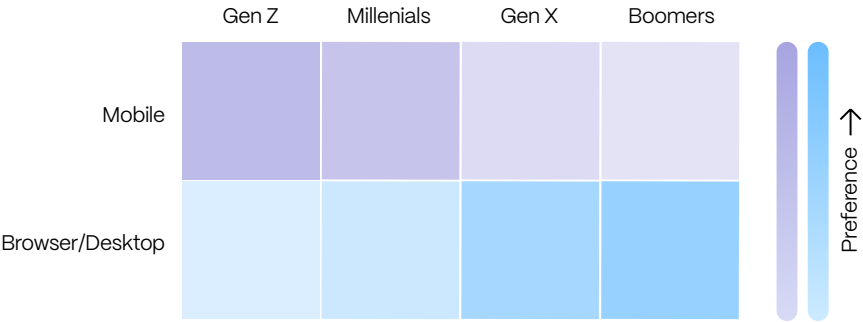
Because search is such a central pillar of the shopper journey, it cannot remain static. Retailers that continue to invest will sustain loyalty, while those that don't may see traffic drift to competitors.

Retailer Implications

For retailers, the cost of poor search is not incremental; it is existential. Every failed query represents not just a lost transaction but potentially a lost relationship. Amazon's dominance in this moment underscores how quickly trust can shift; if a shopper knows Amazon will "always find something," the retailer has already lost the battle.

Mobile and Apps

Device context influences the journey as well. Desktop use is highest among older generations. Yet overall, most shoppers split their activity between mobile and desktop, with no single approach prevailing dominantly:



Looking closer at generational patterns, one distinction is especially notable: 50% of Gen Z shoppers said they prefer using brands' mobile apps specifically over websites. Apps may appeal because they tend to offer stronger personalization, push notifications, rewards, and faster checkout. But preferences remain split. The other half of Gen Z, along with many older shoppers, still favor websites.

Retailer Implications

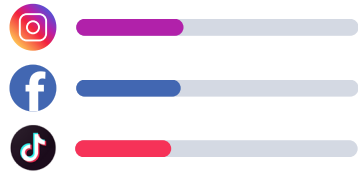
Shoppers use both desktop and mobile, with no single format dominating overall. The most successful retailers will **build adaptive journeys** that feel seamless across in-app, web, and multi-device contexts. That means ensuring things like carts, wishlists, and personalization carry over, tailoring experiences to the realities of mobile versus desktop use, and eliminating friction such as recommendations or browsing history "resetting" when moving across platforms. For most retailers, the website should remain

the universal entry point, while apps could make sense as loyalty engines for high-value segments that benefit from personalization, rewards, and faster checkout.

Social Media as a Discovery Engine

Beyond retailer-controlled environments, social media has emerged as one of the most powerful discovery touchpoints in ecommerce. Platforms like TikTok and Instagram spark product ideas, create trend-driven demand, and send shoppers directly into discovery flows. For younger generations, social media is often the **first touchpoint** in the shopping journey.

The scale of this behavior is striking. Instagram (**38%**), Facebook (**37%**), and TikTok (**34%**) are now major discovery sources across generations. Among younger cohorts, the effect is even sharper: **58%** of those aged 18–29 report discovering and buying products directly via TikTok.



38% of Gen X and **30% of Boomers** buy directly through Facebook

This represents a fundamental shift: discovery is no longer something retailers can fully control. Algorithms set expectations for speed, serendipity, and entertainment. Retailers must now also capture attention after the inspiration has already occurred.

Retailer Implications

Social media now drives much of the inspiration behind shopping journeys, giving retailers opportunities both to meet shoppers where intent is sparked and to guide that intent seamlessly into purchase. Winning strategies will combine presence within social ecosystems — through partnerships, content, ads, and commerce integrations — with strong on-site experiences that validate and convert. Retailers who connect the dots between social discovery and onsite conversion will be best positioned to build loyalty in this new landscape.

Future Outlook: The Battle for the Starting Point

The earliest stages of shopping are evolving quickly, shaped by a growing mix of entry points — from traditional search engines and social to emerging AI agents. The rise of these new front doors raises the stakes: expectations for speed, relevance, and serendipity are being set before shoppers even reach a site.

For retailers, the path forward is twofold. First, strengthen core discovery systems like onsite search so that when intent arrives, it's met with clarity and confidence, not friction. Many of a brand's most loyal shoppers will still begin their journeys directly on its site, and retailers need to be ready to greet them with an experience that feels fast, relevant, and rewarding.

Second, extend reach into the spaces where discovery now flourishes — social platforms, content ecosystems, and AI-driven assistants — ensuring products and experiences are visible and easy to act on.

The future of Define isn't solely about owning the spark of inspiration. It's about **meeting it wherever it starts, and turning it into momentum that carries through to purchase.**



Meredith Arnold
Director of
Site Merchandising

Paperless[®]
POST

"The finding that 40% of shoppers feel their favorite sites still treat them like strangers is telling. Retailers once hesitated to personalize — citing privacy concerns, messy data, or outdated systems — but at the end of the day, shoppers just want a good experience. Today, irrelevance isn't just a missed opportunity; it's a deal-breaker."

Refine: Shoppers Narrowing Down Options



"I know the type of product I want, but I need help choosing."

Once shoppers have defined their goal, they enter the refining stage. Here, the challenge shifts from orientation to **focus**: filtering noise, surfacing relevant options, and evaluating credibility. Retailers have an opportunity to guide shoppers more deeply into the funnel through personalization, agentic AI, and off-site re-engagement.

The Personalization Gap

At the refine stage, shoppers expect the retailer to help them **filter noise and focus on what matters**. Personalization should be one of the key mechanisms that makes this possible — but today, it continues to disappoint:

- **40%** of shoppers say their favorite retailer still treats them like strangers (This finding is even more pronounced in the US, 48%)
- Only **20%** report seeing results that are frequently personalized

The promise of personalization has not yet matched execution, leaving many shoppers with irrelevant or generic recommendations.

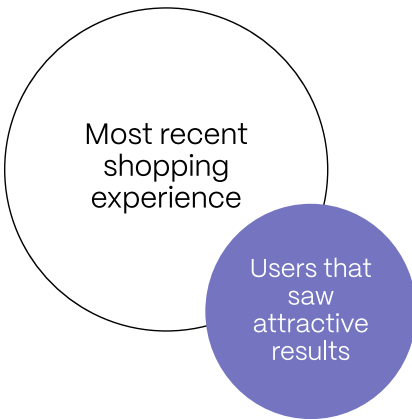
[Relevance] is the alignment between a search term and the results returned — a measure of accuracy. **[Attractiveness]** is the engine's ability to factor in a shopper's context and preferences to surface the results most likely to lead to a purchase.

The problem is not just a lack of personalization, but also the wrong kind. Most retailers lean on simplistic signals — showing more of the same brands, repeating past purchases, or rehashing clicks — because it looks personalized. But shoppers aren't just asking for a mirror of their history; they want help with the mission they're on now. In fact, **63%** say the most important factor when choosing is simply finding products that match their current need, regardless of brand. Only **41%** want to see more from brands they already buy, and just **29%** care about exploring similar brands.

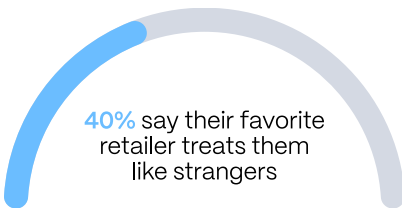
Good personalization requires reasoning about intent, not just history.

That means using in-session [clickstream data](#) to understand the mission — what the shopper is signaling in this moment — and blending it with context from lookalike behavior or broader product trends. When retailers fail to do this, the experience feels generic, forcing the shopper to filter on their own. This disconnect explains why **50%** say the search results during their most recent shopping experience weren't what they were hoping to see.

[Clickstream] is the sequence of clicks and actions a shopper takes across a site or app, creating a behavioral trail that reveals how they browse, engage, and buy.



The opportunity is clear: over half of shoppers (**52%**) say they would **willingly share more personal information** — from style quizzes to saved preferences — if it meant a more cohesive, personalized experience. Retailers who evolve beyond surface-level personalization and invest in intent-driven discovery will not only reduce friction in the refine stage, but also strengthen trust and loyalty through true relevance.

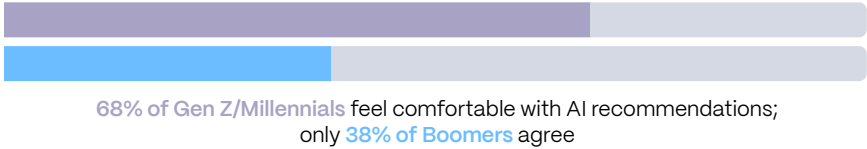


Retailer Implications

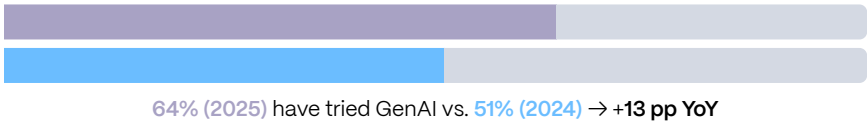
Personalization is not simply about showing products that match past behavior. True personalization means aligning with **intent in the moment**: recognizing whether a shopper is searching for a replacement, exploring a new category, or acting on inspiration from social media. When personalization fails, it undermines the drive to purchase. When it succeeds, it smooths the path forward and strengthens loyalty by signaling that the retailer understands the shopper's mission.

AI as a Guide

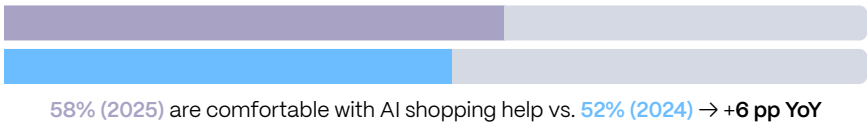
Generative AI is becoming a defining tool in how shoppers **refine their choices** online. It is no longer viewed as a novelty but as a practical way to filter noise, compare similar products, and surface curated bundles that align with intent. Over **68%** of Gen Z and Millennials say they feel comfortable with AI-driven recommendations, compared with only **38%** of Boomers, underscoring both its promise and the generational divide in adoption.



Adoption is accelerating rapidly. In 2025, 64% of shoppers report having tried GenAI tools (such as ChatGPT, Perplexity), up from 51% in 2024 — a 13 percentage point jump in just one year.



Comfort levels are rising in parallel: **58%** now say they are very or somewhat comfortable using AI for shopping help, compared with **52% last year**. In one cycle, **AI has moved from hype to habit**.



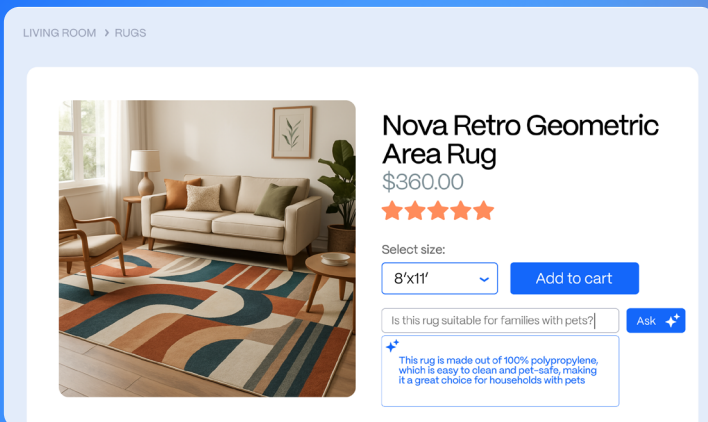
Willingness to go further is equally striking. **60%** of shoppers say they would definitely or probably use an AI agent to help them navigate discovery — signaling that the idea of an “AI shopping assistant” is already shifting from novelty to mainstream demand. Importantly, the value proposition is tangible: when available, **38%** say they have used an AI shopping agent on a retailer’s website, and **69%** of shoppers say ecommerce GenAI tools are at least sometimes genuinely helpful, especially in filtering irrelevant results, comparing similar products, or surfacing curated bundles.



Across demographics, the divide is clear. Younger shoppers embrace AI as an expected part of the discovery journey, while older cohorts remain cautious but curious. Yet even among skeptics, the perception of usefulness is growing.

Retailer Implications

AI’s role in ecommerce refinement is not optional — it is transformative. **Retailers who adopt AI early can meet — and even exceed — shoppers’ rapidly evolving expectations;** those who lag risk seeming outdated. The challenge is execution: when implemented well, it can reduce frustration (such as repeated query reformulation), accelerate decision-making, and evolve from a novelty into a core discovery utility.



Retail Media & Sponsored Listings

Retail media gives retailers a direct opportunity to shape the refinement stage by guiding shoppers toward specific brands or products. Yet without meaningful personalization, these placements often miss the mark. Sponsored listings are now a fixture on many enterprise retail sites, but half of shoppers view them with skepticism or frustration — and one in four (25%) say they would pay to remove ads entirely. That erosion of trust shows up in behavior: 60% of shoppers report using ad blockers at least sometimes, cutting off the reach of both on-site and off-site campaigns.

[Retail media] in this context is the practice of monetizing a retailer's digital properties — like search results pages, category pages, and product detail pages — by letting vendor brands buy ad placements directly within the shopping experience.



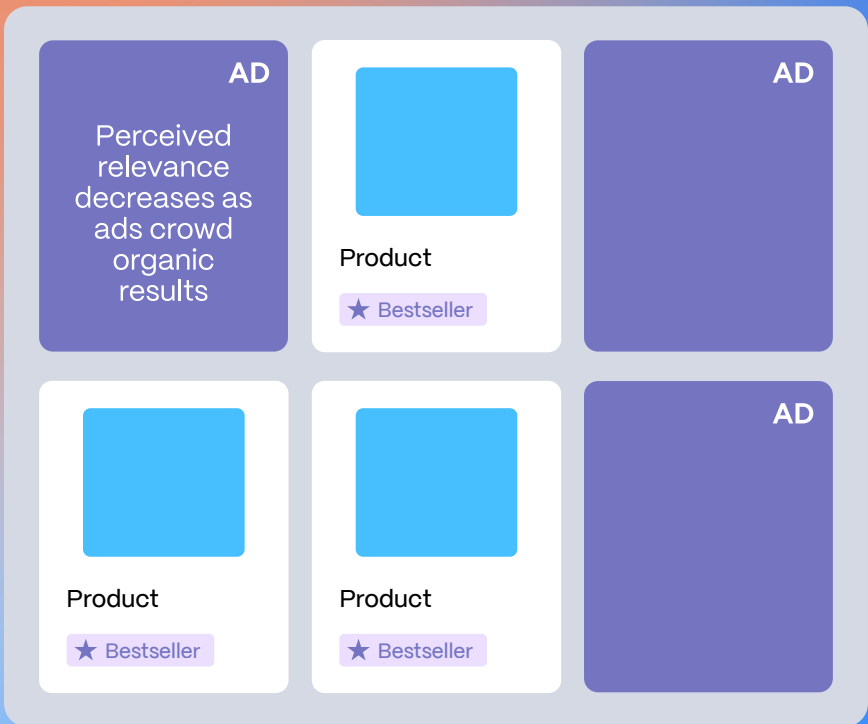
In spite of all of this, nearly one in three shoppers (32%) say they have purchased from a sponsored listing. Even in the face of skepticism and blockers, retail media is driving real revenue, and the **upside could be far greater if placements consistently matched shopper intent.**

One potential way forward for retailers is tighter on-site integration. When sponsored placements are rendered directly within search and discovery results, they become one of the few formats ad blockers can't strip out — and, done right, they also address the bigger problem: relevance. If the ad and search systems remain siloed, shoppers get jarring mismatches (like red high heels shown to someone searching for work boots) that waste ad spend and undercut credibility. But when those systems work together, sponsored results can feel as trustworthy as organic ones — and unlock far greater revenue potential.

What ultimately matters is not whether a placement is sponsored or organic, but whether it **shows the right product for the shopper at hand — and the one most likely to drive revenue for the retailer.** When these priorities diverge, everyone (the shopper, the brand, and the retailer) loses.

Retailer Implications

The key to sustainable retail media is unification. **Sponsored results must meet the same bar for relevance as organic ones**, powered by a single system that integrates shopper intent signals across both. Ads should be contextually relevant, clearly labeled, and woven seamlessly into discovery flows. Retailers who treat retail media as a short-term revenue lever will erode trust; those who align monetization with the shopper journey will build a virtuous cycle: stronger advertiser ROI, higher shopper confidence, and incremental revenue growth that endures.



Offsite Influence: Social Ads & Email

The refinement stage doesn't end on the retailer's site. Shoppers are re-engaged through retargeting ads and product recommendation emails or texts, touchpoints designed to bring them back into the funnel. But the data shows execution often falls short.

Only **15%** of shoppers say product recommendation emails feel extremely relevant to their interests, while nearly two-thirds describe them as only somewhat relevant or neutral. Ads aren't much better: just **20%** say offsite ads feel highly personalized, while the largest share (**39%**) call them only somewhat personalized and another **29%** say neutral. In practice, this means most offsite outreach blends into the background rather than standing out as genuinely useful.



63% say product recommendation emails feel only somewhat relevant or neutral;
68% say offsite ads (social, Google, etc) feel only somewhat relevant or neutral

The cost is twofold: wasted impressions and spend when shoppers tune out, and erosion of trust when ads or emails miss the mark.

Yet the potential remains significant. **More than half of shoppers say they would willingly share more personal information** — by taking a style quiz, logging in, or saving preferences — if it led to a more cohesive experience across email, ads, and the retailer's site. Shoppers are open to deeper personalization, but only when it delivers clear value.



Retailer Implications

For retailers, the imperative isn't to increase message volume but to raise message quality. Offsite ads and emails can be powerful re-engagement tools, but only if they reflect real intent and feel additive to the shopping journey rather than redundant or irrelevant. That requires drawing on the full depth of shopper data — both behavioral signals like categories browsed, filters applied, and products compared, and first-party inputs such as saved preferences or style quizzes. Outreach built on these signals improves precision, strengthens trust, and drives measurable revenue impact.

Future Outlook: The Trust-Driven Middle Funnel

Experiences at the refine stage will increasingly influence whether shoppers progress or abandon. Agentic AI is reshaping discovery, and adoption will continue to accelerate as the technology becomes better at interpreting shopper intent. Retail media will continue to grow, but shoppers will push back against overload. Personalized social and email experiences will remain essential, but must evolve to feel less like reminders and more like [value-added extensions of the shopper journey](#).

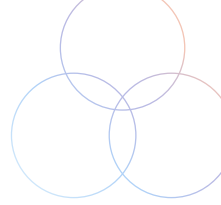
Retailers who view refine-stage discovery as a trust-building opportunity — not just a monetization moment — will guide shoppers more confidently into the decision stage.



Michelle DiPasquale
VP of Product

BSPOKE POST

"The shift from hype to habit with AI is something we're seeing across the ecommerce space, and this data confirms that consumer comfort is catching up to the technology. At Bespoke Post, we're seeing more retailers integrate AI into the shopping experience, but the real question is how shoppers actually want to engage with it. We're currently experimenting with AI on our product detail pages and gift guides ahead of the holiday season, when shopping behaviors really come into focus. It's not just about adding AI, it's about adding the right kind of AI that enhances discovery, personalization, and ultimately, trust."



Decide: Shoppers Finalizing a Purchase



"I have a specific product in mind. Help me confirm it's the right choice."

At the decision stage, shoppers are closest to conversion but also the most cautious. Even after a strong discovery experience, a single trust gap or moment of friction can derail the purchase. The survey findings show that trust, transparency, and efficiency are the critical drivers that determine whether intent becomes conversion.

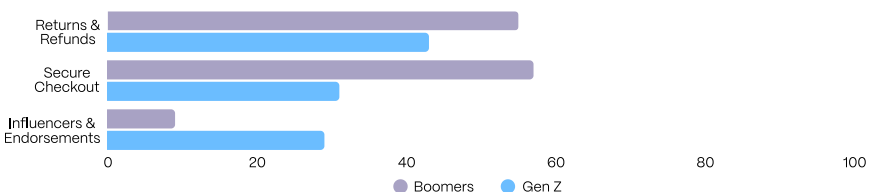
Trust Signals

Trust is a critical hurdle in the final decision stage — often the factor that determines whether intent becomes a purchase or ends in abandonment. Some signals cut across all shoppers: **67%** cite reviews as one of the most important trust factors, and the share is even higher among Millennials (**74%**). Reviews are the universal anchor, shaping confidence no matter the generation.



67% say reviews are one of the most important trust signals;
84% say reviews influence their purchase decisions at least somewhat

Beyond reviews, however, the signals fragment. Older shoppers place more weight on operational assurances: **55%** of Boomers say clear return policies strongly influence their likelihood to buy, and **57%** point to secure checkout as a trust driver. Younger cohorts look elsewhere. **29%** of Gen Z cite influencers and endorsements as important (nearly triple the rate for Boomers), and more than **20%** of Gen Z and Millennials say media coverage matters.



The implication is straightforward: while reviews remain the baseline, trust isn't one-size-fits-all. What reassures Boomers may not resonate as much with Gen Z, and vice versa. Retailers need to understand which signals carry the most weight for their core audience and make those impossible to miss at the moment of decision.

Retailer Implications

Trust is not a universal checklist — it's a conversion lever that works differently depending on the shopper. Reviews, returns, and delivery transparency are baseline expectations, but beyond those, misaligning trust signals with the audience wastes investment. A retailer over-indexing on influencer campaigns might miss older shoppers who care more about returns and checkout security, just as emphasizing policy fine print won't necessarily reassure Gen Z. The practical implication: identify the trust levers that matter most to your core customer segments, then make those signals impossible to miss in the final stages of the journey.

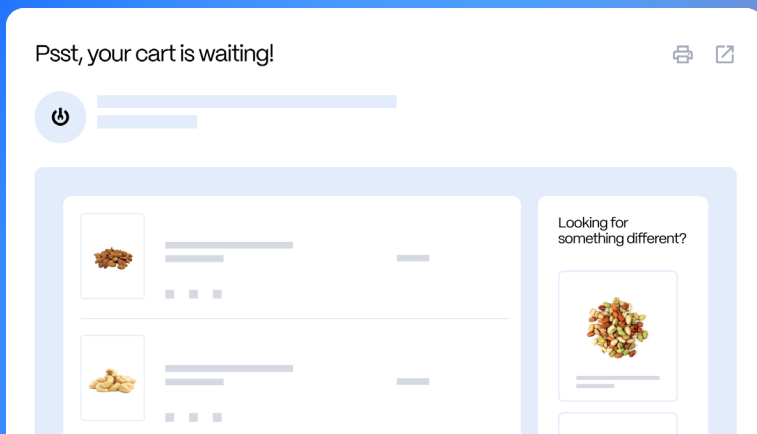
Checkout Friction

Checkout is where intent meets execution — and where small frictions can erase the value of everything upstream. **Only half** of shoppers describe themselves as satisfied with checkout, underscoring that the typical experience works for many but still leaves significant room to improve conversion.



The two leading reasons for abandonment are predictable, but no less costly: **62%** of shoppers cite high shipping costs, and **51%** point to long delivery times. Other barriers include a tedious checkout process (**29%**), unclear return policies (**29%**), and concerns about data security (**27%**).

62% cite high shipping costs as a leading reason for abandonment



Generational preferences reveal further nuance. Credit cards (53%) and PayPal (51%) remain the dominant methods across all age groups, serving as the universal anchors of online checkout. Among Gen Z, however, Apple Pay is nearly on par with credit cards, with 48% preferring it — a sharp contrast to Boomers, where only 8% use Apple Pay. Buy Now, Pay Later follows a similar generational divide, preferred by 15% of Gen Z but just 6% of Boomers.

These differences aside, shoppers converge on one expectation: speed. Across all ages, 64% say one-click or accelerated checkout options (such as Shop Pay) are somewhat or very important.



64% say one-click or accelerated checkout is at least somewhat important

Retailer Implications

The biggest checkout barriers aren't surprises — shipping and delivery still dominate. What matters is whether retailers treat these as solved problems or as ongoing priorities. Alongside those fundamentals, payment design should reflect audience differences: older shoppers lean on credit cards and PayPal, while younger cohorts expect Apple Pay, digital wallets, and flexible options like Buy Now, Pay Later. Getting both the universals and the audience-specific details right is what turns checkout from a tolerated step into a reliable driver of conversion.

Future Outlook: From Checkout to Confidence Loop

The decision stage is not just about completing a transaction; it's about setting the tone for the next one. In 2025 and beyond, retailers who view checkout as the **beginning of the next loyalty cycle** will outperform those who treat it as the end of the funnel.

Expectations will continue to rise: instant payment options, guaranteed delivery transparency, and seamless returns have become baseline expectations. Trust signals will expand beyond reviews and returns to include sustainability claims, authenticity verification, and even AI-driven post-purchase support.

Retailers who make checkout effortless and trust unmistakable will not only close more sales but also earn repeat visits in a landscape where loyalty is harder than ever to maintain.

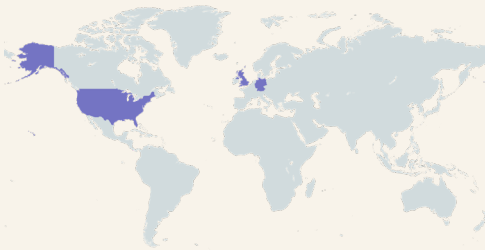
About the Survey

The State of Ecommerce survey was conducted in August 2025 by Constructor and Shopify. It captured responses from more than 1,500 consumers in the United States and Europe. Respondents represented a balanced mix of online shopping behaviors, income levels, and generational cohorts.

Methodology

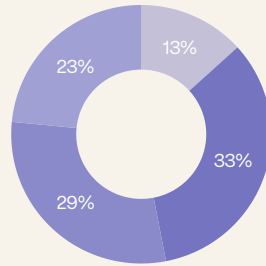
Regions surveyed:

US, UK, Germany



Generational representation:

13% Gen Z (18–29), 33% Millennials (30–44),
29% Gen X (45–60), 23% Boomers (60+)



Question set:

50+ questions covering search, personalization, AI, retail media, mobile shopping, checkout, and trust signals

Analysis approach:

Findings were segmented by region, generation, and device preference to identify differences that meaningfully impact shopping behaviors

The purpose of the study is to provide retailers with a data-driven view of how shoppers search, evaluate, and purchase products online in 2025 — and where expectations are outpacing current ecommerce experiences.