2025 Ocado Ads

State of Search Report

Introduction

Welcome to the State of Search Report 2025

Growth in grocery e-commerce is not a new trend, but undoubtedly the COVID pandemic served as a major catalyst, fundamentally transforming a once-simple, in person, chore into a sophisticated digital-first experience. This shift has elevated customer expectations for convenience and speed, making online grocery shopping a new standard. Today, millions of people fill their cupboards and fridges through a screen, but what does this landscape of grocery shopping and commerce actually reveal about us?

The **Ocado Ads State of Search Report 2025** is an exploration of the hidden story behind every click, tap, and search. This comprehensive report, drawing from a deep dive into over 47 million transactions, 183 million sessions and a staggering 695 million searches on Ocado.com, proves that the online search bar is far more than a simple functional tool. It's the primary "front door" to the virtual store and can provide us with a range of insights into our shopping needs, desires, and even our most relatable mistakes. It stands as the single most dominant behaviour in the online grocery world, consistently outperforming all other navigation methods by a significant margin.

This report is structured to provide five insights into the fascinating world of online grocery search, covering:

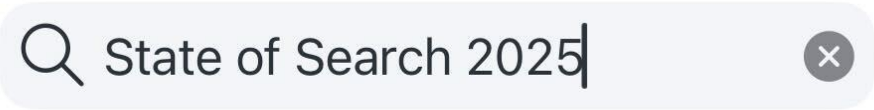
- The undeniable primacy of search as the ultimate discovery and shopping tool

- How different categories rely on search and other pages for conversion

- An overwhelming preference for unbranded search terms

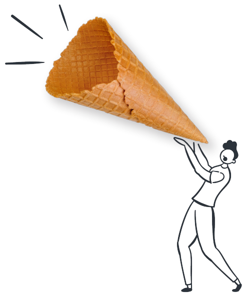
- The psychological journey from filling a basket with essentials to indulging in impulse buying closer to delivery

- A look at the unique customer trends and human errors that are captured in our everyday searches



"The online grocery search bar is more than just a tool; it's a window into what we're all really thinking when we shop. This report is a treasure trove of data, diving into millions of searches to uncover the brilliant, and sometimes brilliantly messy, story of how we fill our virtual baskets. It's an honest look at the human side of e-commerce, revealing the patterns, desires, and even the common typos behind our weekly shop"

Hannah Gibson - CEO Ocado Retail



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State of Search 2025 in numbers

47 million orders

2 years of history

183 million sessions

695 million searches

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Who are Ocado Ads?

Ocado Ads is the Retail Media Network of Ocado Retail, the online-only UK grocery retailer, and exists to deliver **Customer First Brand Growth** for advertisers in the UK.

Ocado Ads offers advertisers full-funnel retail media capabilities that leverages Ocado's extensive first-party customer data. Because Ocado is an online-only business, it captures 100% of its customers' purchase behavior, providing a rich dataset to power retail media propositions.

Ocado Ads aims to be the most flexible, innovative and disruptive Retail Media Network in the UK through **three** key ways. Call it the ingredients in it's Secret Sauce.

One. The Champions of the self serve operating model, with tools and platforms to help advertisers grow

Two. Building innovative and flexible ways for advertisers to use retail data for audience targeting across channels

Three. An agile disruptor and the home of test and learn in the UK

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The report is powered by data from Ocado Retail

Ocado Retail is the UK's largest online-only supermarket, operating as a 50:50 joint venture between **Marks & Spencer Group** and **Ocado Group**. Ocado Retails business model is a compelling case for technology-driven retail. Unlike traditional grocers, it has no physical stores, fulfilling all orders from highly automated warehouses known as **Customer Fulfilment Centres (CFCs)**.

Ocado's competitive advantage lies in delivering market leading freshness, competitive value and an unrivalled service. The joint ownership structure delivers a unique proposition in UK grocery customers.

Through Ocado Group, products are delivered through the **Ocado Smart Platform (OSP)**, which uses robotics and AI to enable high-efficiency order picking, minimal substitutions, and on-time delivery. The partnership with M&S provides a high-quality product range to compliment national and challenger brands, as well as Ocado Own Label in the product mix. Ocado's pure play model offers a scalable and profitable alternative to traditional store-based online fulfillment.

Headlines

Search is still king

Search remains a constant and stable force

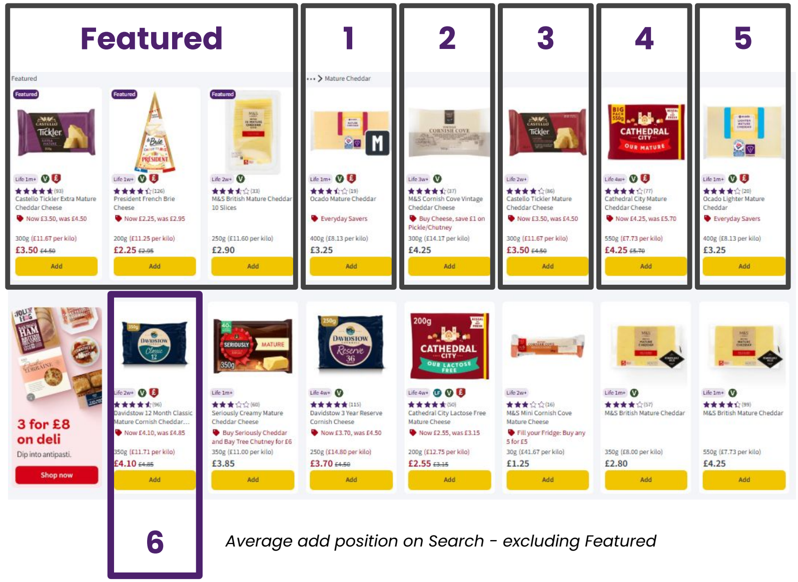
In the fast changing world of online retail, where new features and fleeting trends come and go, search remains a constant and stable force. Customers are still using search more than any other feature, and the data backs this up. A significant **45%** of all items added to a customer's basket come directly from a search query (see next page). This isn't just a fleeting trend; this figure has remained remarkably consistent over time, far exceeding all other methods of finding products. So what about some other methods: the Favourites list, while is crucial for loyal customers, accounts for **17%** of basket items, while simply browsing the virtual aisles contributes to around **3%**. It’s clear that the online customer is on a mission, they arrive with a clear purpose, and use the search function as their primary tool to fulfill it efficiently.

Products need to be seen to be sold

This reliance on search is particularly pronounced for new shoppers. Nursery shoppers, those making their first few orders, see search account for almost **55%** of their basket, as they are still figuring out the sites layout and discovering products. Their Favourites list is virtually empty, so the search bar is their essential guide to finding what they need. This makes an intuitive, fast, and effective search function a critical element of any customer acquisition strategy. If you want to welcome new customers and retain them, your search experience must be flawless, because it is their first, and most vital, point of contact with a brand or product.

We also analysed how much time customers spend on the search page, and how far down they scroll before they buy something. The results show how critical it is for products to be easily discoverable on the search page. Our data indicates that the average add-to-basket position is **6**. This means most customers add products from the first two rows on web, and within a quick scroll on a mobile app. We also found customers typically add a product to their basket, on average, within **25 seconds**. This highlights how quickly customers shop, often making subconscious, rapid fire decisions.

All this results in search visibility being essential. Not only does it help drive immediate sales, but it also helps a product get into a customer's favorites, supporting with building long-term loyalty and value. In short, for products to sell, they need to be seen to be sold.



Average add position on Search - excluding Featured

25 seconds

Average time to add to basket on Search

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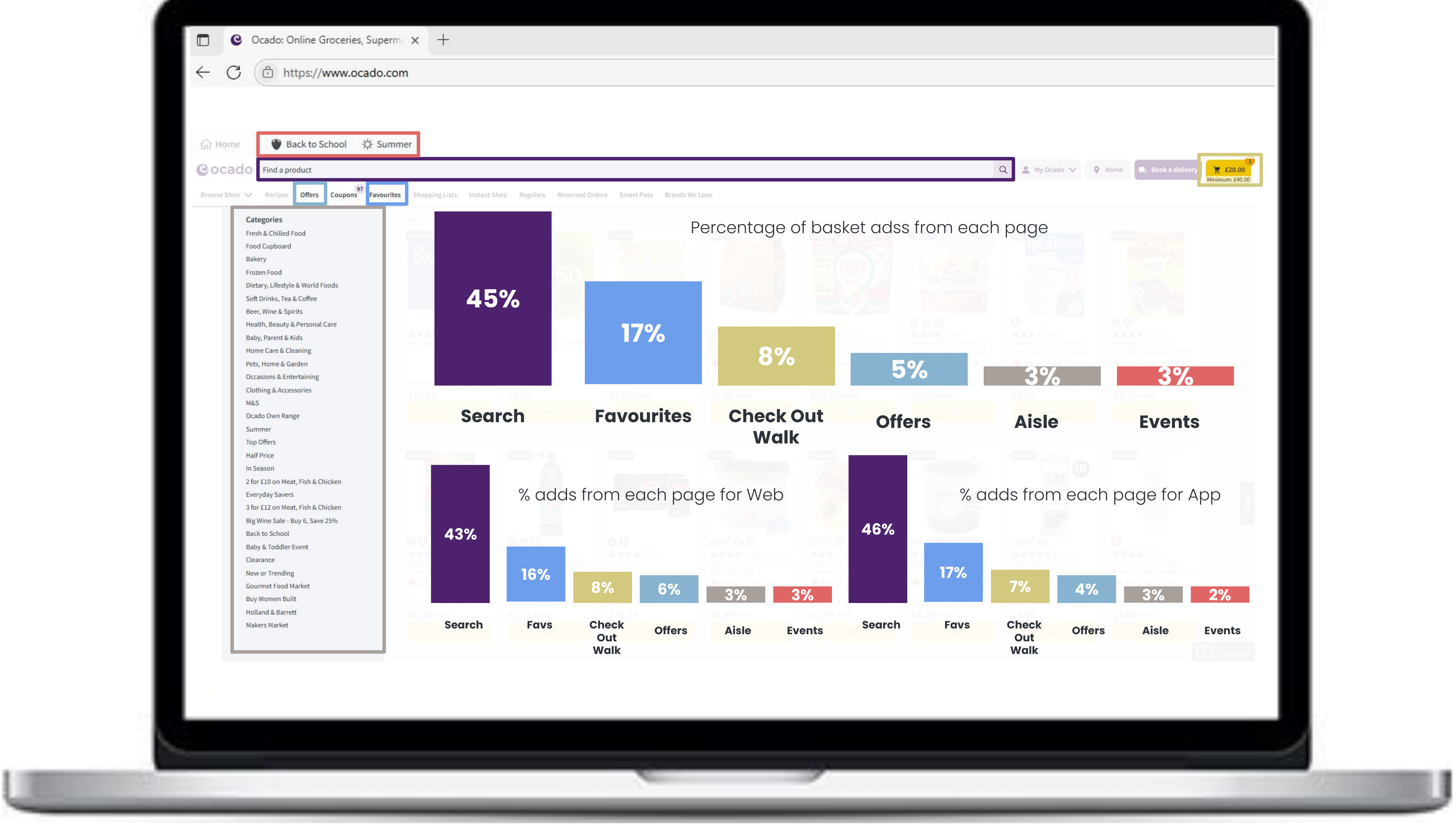
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Summer
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Find a product
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Home
Book a delivery
£20.00
Minimum: £40.00
Browse Shop
Recipes
Offers
Coupons
Favourites
Shopping Lists
Instant Shop
Regulars
Reserved Orders
Smart Pass
Brands We Love
Categories
Fresh & Chilled Food
Food Cupboard
Bakery
Frozen Food
Dietary, Lifestyle & World Foods
Soft Drinks, Tea & Coffee
Beer, Wine & Spirits
Health, Beauty & Personal Care
Baby, Parent & Kids
Home Care & Cleaning
Pets, Home & Garden
Occasions & Entertaining
Clothing & Accessories
M&S
Ocado Own Range
Summer
Top Offers
Half Price
In Season
2 for £10 on Meat, Fish & Chicken
Everyday Savers
3 for £12 on Meat, Fish & Chicken
Big Wine Sale - Buy 6, Save 25%
Back to School
Baby & Toddler Event
Clearance
New or Trending
Gourmet Food Market
Buy Women Built
Holland & Barrett
Makers Market
Percentage of basket adss from each page
45%
Search
17%
Favourites
8%
Check Out Walk
5%
Offers
3%
Aisle
3%
Events
% adds from each page for Web
43%
Search
16%
Favs
8%
Check Out Walk
6%
Offers
3%
Aisle
3%
Events
% adds from each page for App
46%
Search
17%
Favs
7%
Check Out Walk
4%
Offers
3%
Aisle
2%
Events

While the data overwhelmingly establishes search as a dominant force, a deeper analysis reveals that its dominance is not uniform. Rather, its importance varies by category (see Figure 1), reflecting a range of customer mindsets and shopping missions. These category-specific nuances are crucial for understanding the full scope of online behaviour, as they can help both retailers and brands create differentiated category level strategy.

Certain categories consistently rely more heavily on search for product discovery and selection, signifying a purposeful, premeditated intent from the customer. This is most evident in the Ambient Grocery category, which includes a wide range of shelf-stable products. Items like Cooking Essentials, Oils, Vinegars, and Home Baking all heavily over-index on search. The customers mindset here is highly transactional; they know they need a specific item; be it "flour" for a cake, "olive oil" for a recipe, or "pasta" for dinner, and they use the search bar as the most direct route to fulfilling that need. They aren’t always looking to be inspired, and are often looking to execute a task quickly and efficiently.

This same purpose-driven behaviour extends to the Non-Food Grocery category. Items such as Suncare and Beauty products are often sought with a clear, specific goal. A customer looking to replenish a particular sunscreen before a holiday, or find a specific brand of shampoo, is highly likely to bypass general browsing and go straight to the search bar.

Conversely, some categories are less reliant on search. This suggests that customers will add in different ways, adding to basket more heavily from areas such as special offers pages, events, or by simply scrolling through the virtual aisles. This different behaviour is particularly prominent in the Fresh, Home, Chilled & Frozen categories.

For example, the Fresh, Chilled & Frozen categories, like prepared meals, fruit, veg and desserts, are often purchased frequency. Customers buy them regularly, so they don't rely on needing to search for them each time. Instead, they rely on methods that are more efficient for repeat buys. For instance, a customer will buy via their Favorites list for quick re-ordering, or via the checkout process when prompted with either regular purchases, items they have forgotten, promotions, or incomplete offers.

For areas such as Home and Clothing, these are typically low-frequency purchases. Customers don't buy these items every week, so they are less likely to rely on a Favorites list. Instead, they are often browsing for inspiration rather than searching for a specific product. This is why Aisles and Events in particular, are so effective. These areas help them discover new products they didn't know they needed. Non-food items can also be impulse buys. A customer might not have a new frying pan on their shopping list, but seeing one in a well-merchandised aisle or event section might inspire them to add it to their basket.

Despite these different behaviors, search remains the primary way customers add items to their basket across all categories.

Category	Aisle	Checkout Walk	Event	Favourites	Homepage	Offers	Search
Ambient Food	2%	5%	1%	14%	1%	3%	55%
Chilled & Frozen	3%	8%	2%	18%	1%	7%	40%
Drinks & Impulse	3%	7%	3%	17%	1%	4%	46%
Fresh	3%	8%	2%	17%	1%	5%	43%
Non Food Grocery	3%	6%	3%	16%	1%	3%	50%
Home	4%	5%	13%	4%	1%	3%	36%

Figure 1: % adds from Search page split by Category over the last year. Excludes pages such as Back of Pack, Trolley, Recipes etc

The Unbranded Majority and the 90/10 Split

Search trends can reveal powerful insights into human behaviour, and by analysing over **695 million searches**, we can dig into specifics of how the UK is using the search bar to complete their grocery shop.
One of our main areas of focus was the relationship between branded and non-branded search terms. Our analysis of the top 4,000 search terms on Ocado revealed that roughly 90% of searches are for generic, unbranded terms (see Figure 2). For example, customers are overwhelmingly searching for "Bread," "Ketchup," or "Milk" rather than specific brands like "Hovis," "Heinz," or "Cravendale". This suggests that during a shopping trip, customers are more focused on finding the item they need rather than a specific brand. This insight underscores the importance of product discoverability, and how crucial it is for a product to be near the top of the results for high traffic generic search terms.

While the trend towards unbranded search is dominant across the board, there are some interesting nuances by categories. Categories where brand loyalty is deeply ingrained show a significantly higher percentage of branded searches. For instance, Drinks and Impulse categories show a higher percentage of branded searches (**28%**), with Non-food Grocery also over-indexing for branded terms, with **22%** of adds coming from them. In contrast, its categories with low branded penetration, like those within Fresh, where we see a significant under indexing on branded searches, with only **0.5%** coming from these terms. Over and above this, within the branded search volumes, we can see around 15% of these being linked to "m&s", with "m&s meal deals" and "m&s biscuits" the most prominently searched.

However, even with these nuances, the overarching pattern is undeniable: for the vast majority of our grocery list, we lead with the product itself, making the initial generic search terms an important area for both established and challenger brands to drive sales, conversion and penetration.

Figure 2: Branded vs Unbranded Searches, split by category

Category	Brand	Non Branded
Ambient Grocery Food	5.7%	94.3%
Chilled & Frozen	10.2%	89.8%
Drinks & Impulse	27.7%	72.3%
Fresh	0.5%	99.5%
Non Food Grocery	21.9%	78.1%
Home	10.3%	89.7%
Total	**9.3%**	**90.7%**

15% of these branded searches contain M&S with "m&s meal deals" and "m&s biscuits" leading the way

From Staples to Splurges with Basket Builders vs Basket Expanders

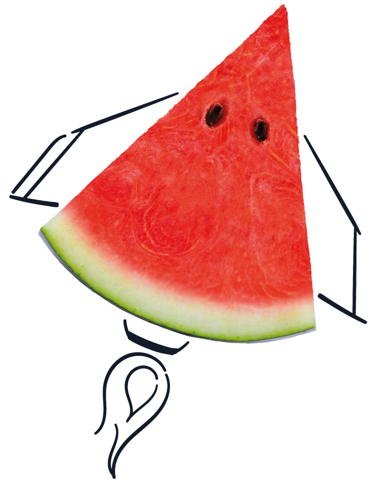
Basket Builders	Basket Expanders
milk	crisps
semi skimmed milk	biscuits
chicken breast	ice cream
water	parmesan
beef mince	chocolate
chicken thighs	red wine
whole chicken	white wine
whole milk	garlic bread
tea bags	spring onions
fairy washing up liquid	multipack crisps

Figure 3: Top list of categories by Basket Builders (Categories most likely shopped during earlier sessions in a customers basket), versus Basket Expanders (Categories most likely shopped during the sessions closer to check out)

The way people add items to their online shopping baskets isn't random. It reveals interesting insights into human behavior and how it differs from shopping in a physical store, where your path is limited by the store's layout. Online, you can navigate your own virtual store and aren't restricted to walking down specific aisles. We have broken the online journey into two distinct parts to explore this in more detail.

The first part is defined by the **Basket Builders** (see Figure 3). These are the foundational, must-have items that are searched at the very beginning of the shop. This list is dominated by staples like "Milk," "Chicken," "Tea Bags," and "Fairy Liquid". Customers tend to secure these "essentials" first, almost as if they are completing a checklist of must haves, or something that's ran out recently. They are the non-negotiables that form the basis of a weekly shop, and are a top priority to get added. These are the items that retailers should focus on having high levels of availability, have a strong set of deals, and a compelling range, as this is where you run the highest risk of losing the entire shop.

Then, once the "boring" stuff is out of the way, customers add what we have defined as their **Basket Expanders** (also see Figure 3). These are the items searched for during sessions closer to delivery. Once the necessities are in the basket, customers top up their basket with more discretionary purchases, and those last minute "wants". These items are added later in the shopping journey and include things like "Crisps," "Biscuits," "Ice Cream," "Red Wine," and "Chocolate".



Unpacking what's on Britain's Shopping List, and where we get it wrnog

The search bar is more than just a tool; it's a living, breathing reflection of our collective cravings, quirks, and even our most relatable mistakes. For example, this year we have seen a significant surge in searches for new and emerging flavors like **"Dubai Chocolate", "Hot Honey"**, and **"Pistachio"**, directly correlating with the viral recipes and trends that have played out on social media over the last 12 months.

The data also reveals the new players on the scene this year. Topping the list of fastest-growing brands are **"Nongshim," "Fussy", "Ineos",** and **"Jasons,"** all gaining traction through the power of search.

The search bar even settles long-standing food debates. **"Hummus"** (with a "u") wins out over "Houmous" (78% vs. 22%), and **"Lasagne"** (with an "e") is a clear winner over "Lasagna" (94% vs. 6%). Other settled debates include:

Yoghurt (82%) vs. **Yogurt** (18%)

Whisky (70%) vs. **Whiskey** (30%)

Pitta (93%) vs. **Pita** (7%)

Turmeric (59%) vs. **Tumeric** (41%)

Doughnut (72%) vs. **Donut** (28%)

BBQ (88%) vs. **Barbecue** (10%) vs. **Babeque** (2%)

This also gives us a wonderful, and very human, insight into how we actually type. It proves we're all in a rush and prone to typos. The most frequently misspelled term in the report is **"Guinness",** with a staggering 35% of searches missing the second "n" when comparing the two variations. Other common misspellings include **"Mozzarella"** (16% misspelled), often typed as "Mozerella", and **"Broccoli"** (10% misspelled), usually as "Brocolli". This highlights the crucial importance of a sophisticated search algorithm. It's what turns a simple typo into a successful product discovery, bridging the gap between our intentions and our sometimes-clumsy typing to ensure a seamless journey from thought to purchase.

Explore more on the next page.

"Nongshim", "Ineos", "Jasons" and "Fussy" were the fastest growing branded search terms this year

Whilst "Hot Honey", "Pistachios" and "Dubai Chocolate" were the fastest growing non-branded search terms

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Britain's Shopping List Unpacked

Settling the debate, which spelling variation wins out?

1. Houmous(22%) or Hummus (78%)
2. Yoghurt (82%) or Yogurt (18%)
3. Mange Tout (73%) or Mangetout (27%)
4. Lasagna (6%) or Lasagne (94%)
5. Whisky (70%) or Whiskey (30%)
6. Pita (7%) or Pitta (93%)
7. Tumeric (41%) or Turmeric (59%)
8. Chilli (94%) or Chili (6%)
9. Doughnut (72%) or Donut (28%)
10. Barbecue (10%) or Barbeque (2%) or BBQ (88%)

Where we get it wrong, common misspellings

1. **Avocado** (Spelt wrong 6% of time ie Avacado, Avocado)
2. **Broccoli** (spelt wrong 10% of the time, ie Brocoli, Brocolli)
3. **Mozzarella** (spelt wrong 16% of the time, ie Mozerela)
4. **Tomato Puree** (spend wrong 5% of the time as Tomatoe Puree)
5. **Lurpak** (spelt wrong 8% of the time, as Lurpack etc)
6. **Lettuce** (spelt wrong 2% of the time with Letice/ Letuce)
7. **Guinness** (spelt wrong 35% of the time with Guines/ Guiness)
8. **Spaghetti** (spelt wrong 4% of the time with Spagetti)
9. **Raspberries** (spelt wrong 4% of the time Rasberries)
10. **Deodorant** (Spelt wrong 4% of the time with Deoderant)

Top 10 Branded searches this year

1. Weetabix
2. Diet Coke
3. M&S Ready Meals
4. Fairy Washing Up Liquid
5. Coke
6. M&S Biscuits
7. Lurpak
8. Coke Zero
9. Pepsi Max
10. Marmite

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Summary

The **2025 Ocado Ads State of Search Report** explores the fascinating world of online grocery shopping behaviour, focusing specifically on the role of the search bar. Published by Ocado Ads, the Retail Media Network of Ocado Retail, the report draws two years of purchase history, encompassing data from 47 million orders, 183 million sessions, and a staggering 695 million searches on Ocado.com.

So what was uncovered?

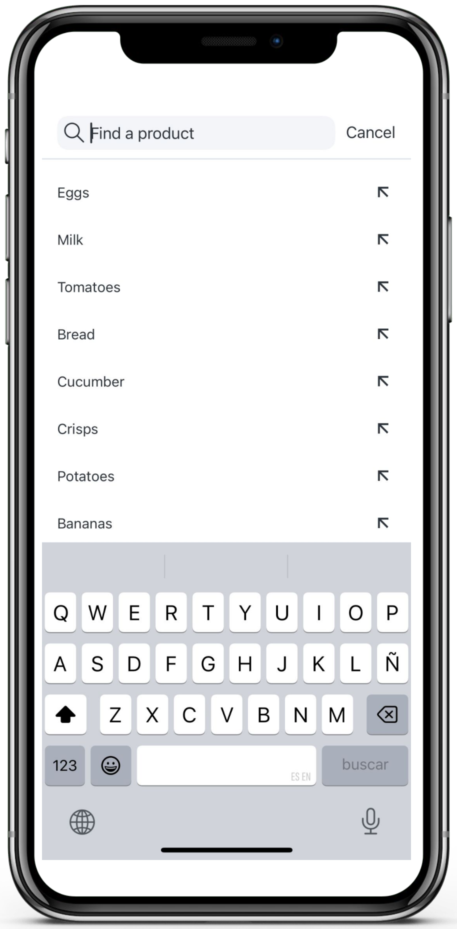
Search is king, and has solidified its position as the primary gateway for customer interaction in online grocery, consistently outperforming all other navigation methods by a significant margin. It acts as the "front door" to the virtual store, with a significant 45% of all items added to a customer's basket coming directly from a search query. To add to this, customers typically add a product to their basket within 25 seconds of searching, highlighting the speed of purchase decisions.

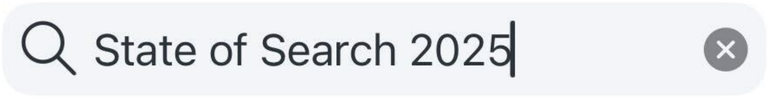
Unbranded search dominates, with these search terms accounting for over 90% of all searches. This underscores the critical importance of products getting strong visibility on the non-branded terms that matter to help drive sales, conversion and customer penetration.

Basket Builders vs. Expanders highlight how customer shops differently over time. "Basket Builders" – foundational, must-have items like milk or chicken breasts, typically searched early in the creation of a grocery basket – and "Basket Expanders" – later, impulse-driven purchases like crisps or chocolate, often added closer to delivery, give some interesting examples into the psychology behind building a grocery basket.

And finally, the **human elements in search** reveal how we can use search trends to settle long running debates (e.g., Hummus vs Houmous), as well as highlight frequent misspellings for terms like Mozzarella and Guinness. It's also true to say that search is a window into the viral trends that play out through social media, with "pistachio", "dubai chocolate" and "hot honey" on the exponential rise.

But what next for the humble search bar? Whilst there is a lot of hype around AI shopping agents, and the future impact this has on how we shop, what remains true today is the search bar is still the go-to for customers building their grocery baskets online.





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Interested in learning more, contact the team

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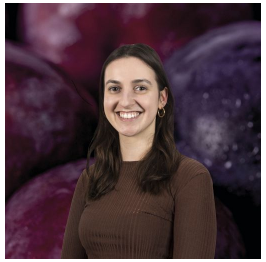

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