Innovations in search and product discovery are advancing rapidly, and can be adopted without needing to rebuild entire digital commerce platforms. Application leaders in digital commerce can use this guide to understand the commerce search market and support related product discovery initiatives.

Overview

Key Findings

- Effective product discovery offers a competitive advantage, and best-of-breed commerce search vendors innovate more rapidly than out-of-the-box digital commerce platform search capabilities (and are often superior).

- Digital commerce search capabilities overlap with other markets, particularly the insight engines (though there is little overlap in vendors), digital experience platforms, product finders, personalization and recommendation engines and conversational AI markets.

- Most vendors of commerce search engines now also support wider product discovery features, including catalog browse, general content search, recommendations and merchandising.

- Personalization, AI-enhanced relevance, emerging voice interfaces as part of multimodal discovery and the shift to composable business are driving innovation.

Recommendations

Application leaders responsible for digital commerce and CRM sales technologies must:

- Enhance product discovery by evaluating the commerce search vendors listed in this guide when looking to significantly enhance or compose a new digital commerce platform.
Assess SaaS or PaaS vendors to implement commerce search without the need to own software, fully replatform or change other components, such as the commerce engine, DXP, WCM or PIM systems.

Use search APIs to enable multiexperience product discovery across different touchpoints, from mobile apps to kiosks, chatbots and smart devices.

Investigate semantic search to prepare for voice-driven, multimodal and conversational search in the future.

**Strategic Planning Assumptions**

By 2025, graph technologies will be used in 80% of data and analytics innovations, up from 10% in 2021, facilitating rapid decision making across the enterprise.

By 2025, 80% of large enterprises will need to have a conversational-technology-focused center of excellence or skills resource.

By 2024, 40% of enterprise applications will have embedded conversational artificial intelligence, up from less than 5% in 2020.

**Market Definition**

Commerce search is defined as “the use of search technology products to find relevant product(s) or service(s) for customers.” These products also support the browse or catalog navigation journey, enabling end-to-end product discovery, the first step in the commerce customer journey.

Product data is more structured than general web content, so search results are returned with attributes that facilitate filtering, comparison and selection. Search results can be highly visual, using engaging layouts and multimedia. Content other than products also may be searched to engage, support decisions or inform, and searching with an image (visual search) is emerging.

Search combines free text/voice and autocomplete with guided query and subsequent navigational options. Sophisticated product discovery solutions include merchandising capabilities, personalization, category and landing pages for SEO and promotions, semantic search technologies and integrated personalization.
Market Description

The focus of this research is digital commerce search within websites and other digital touchpoints, and this remains the primary market identifier. However, the market scope is now broader, with most vendors considering the wider goal of product discovery. The mechanisms for product discovery covered in this research include search, merchandising, catalog browse and SEO, personalization and recommendations, analytics, optimization and insight. See Figure 1 for the overall scope of this Market Guide.

Figure 1: Digital Commerce Product Discovery

Digital Commerce Product Discovery

Vendors included in this Market Guide all provide these wider product discovery capabilities.
As a result of this evolution, most vendors can support the digital commerce customer journey up to the product detail page (PDP). Two vendors in this research (Bloomreach and Reflektion) also support the PDP via a native DXP or headless CMS product. This trend aligns with our composable commerce research, which proposes that monolithic digital commerce platforms will give way to composed platforms comprising modules formulated as packaged business capabilities (PBCs) from several sources (see Composable Commerce Must Be Adopted for the Future of Applications). Most commerce search vendors go to market as “drop-in” replacements for existing search engines. Almost all are cloud-based, SaaS and built API first, exposing APIs that enable search wherever the customer needs it, features that ease integration into existing channels.

Product discovery is a critical part of a digital commerce funnel, and can be seen as a low-hanging fruit when considering value-for-money innovation with a potentially high impact on conversion. This is especially true when commerce search is combined with personalization, a capability that all vendors in this research feature in some form.

**Market Direction**

The delivery of search capabilities (not “web search”: Google, Bing, Yahoo, Baidu, etc.) has been dominated by two open source engines, SOLR and Elasticsearch, both of which provide search logic over the Apache Lucene index. When using these engines, an organization needs to build a product around them, for both business user search administration and front-end integration. These engines do not have the wider product discovery capabilities discussed in this research. Thus, commerce search vendors can differentiate in the tooling provided over these engines, or even replace the engines themselves with proprietary systems. Commerce search has been around for nearly as long as the internet, and vendors in this space range from less than three years old to over 20 years old.

Significant events in the market have provided the vacuum into which many vendors have expanded. The gradual fading of Endeca from the market, dominant in the enterprise space 10 years ago, and remaining implementations are now generally perceived to be approaching end of life. The removal of Microsoft’s FAST from the market and final withdrawal of support in 2020. Google’s departure from the space around 2014-16, which saw the removal of Google Site Search and the suspension of sale of the Google Search Appliance. Most recently, in 2020 Adobe announced the end of support for Adobe Search and Promote, sunsetting in 2022.
Although the public cloud giants, Google, Amazon Web Services (AWS) and Microsoft, all offer cloud-based search engines, none of them as yet offers a full commerce search product. However, Google has reintroduced Google Programmable Search Engine for use on websites, and a set of product discovery solutions for retail including Search for Retail are available, hinting at more things to come.\(^1\)

Additionally, search is becoming a must have for business-to-business (B2B) digital commerce. During the COVID-19 pandemic we have seen a rush to digital in B2B. In a recent B2B digital commerce survey, we found that two of the top three benefits of digital commerce were search-related: comparing prices and ease of product discovery (see Figure 2).

**Figure 2: B2B Commerce Buyer Benefits**

![Graph showing B2B commerce buyer benefits](image)
Market Analysis

Businesses looking for a digital commerce search product have a number of drivers. One of the most important is improved conversion. Search engines embedded in digital commerce and experience platforms are typically quite basic, and replacing them is less invasive than for many other parts of the digital commerce or digital experience stack. Given the 20 or so years that commercial digital commerce platforms have been deployed, an incumbent search engine may also be at the end of its life, underperforming or lacking leading-edge features. Indeed, many vendors in this space have productized integrations with third-party product discovery offerings, and these are listed in the vendor profiles in this research. Embedded search may also only operate within the digital commerce/experience platform when, in today's multiexperience world, the same features are expected to be used via multiple touchpoints, such as mobile apps, clienteling, in-store kiosks and customer service applications. Total cost of ownership (TCO) is another important driver, with organizations looking to reduce what can be expensive on-premises operational costs for underperforming search platforms. Finally, commerce search products are considered when building a new platform in a modular or composable fashion for increased business agility.

All of the vendors in this Market Guide provide leading-edge capabilities expected to improve product discovery and conversion. While conversions and costs are at the heart of decision-making, some nonfunctional requirements are also paramount, with performance and ease of integration foremost in our client inquiries.

To approach the market, a broad range of vendors has emerged, many of which are relatively recent startups taking advantage of the growth of digital commerce, new technology developments and cloud-native development and deployment. As with many other areas of enterprise application technology, the shift to cloud SaaS is a significant driver of innovation, and the product discovery use case fits well to autoscaled, public cloud, multitenant SaaS deployment.

Search Product Attributes

To define the market, we looked at the common features among vendors and selected a set of attributes that represent the market as we see it today. These attributes do not represent a list of "minimum entry requirements" shared by all vendors in the market. The chosen attributes of the representative vendors are:

- Rich autocomplete
- Boost, bury and hide
All vendors included have these capabilities, but depth and functionality varies widely in certain areas. For example, personalization capabilities vary from a basic segmentation engine working with searching data only, via native integration, to a full first-party personalization engine and CDP, for use across the whole digital domain. Similarly, semantic search support varies widely, from search index improvement, via autotagging, to full entity extraction via query NLU and use of domain ontologies for inference and to understand intent.

Beyond the above list, there are a number of features that are often desired by clients and shared by most vendors. These include:

- Content search and other content types integrated with product search
- Modal “quick view” of products in results
- Visual merchandising
- Multiple search language support
- Search analytics
- Product recommendation engine (contextual, product substitution, complementary, etc.)
- Category navigation and replacing a static taxonomy (catalog browse) up to (but not including) PDP
- Personalization: Native (segmentation and rules) engine
- Personalization: One-to-one individualized personalization based on clickstream and/or profile
- Support for semantic search via natural language technologies

See Note 2 for a full list of commerce search features.
In our previous Market Guide for Digital Commerce Search, we identified two areas of emerging capabilities, both included above: personalization and natural language technologies (NLT). Both continue to be major threads of innovation in the space, and at the time of writing all vendors in this Market Guide offer these capabilities at some level. However, the depth of these capabilities varies widely, and before selecting a vendor, you should carefully examine your requirements in these areas, and map them to shortlisted vendors’ capabilities. Ideally, you should do this via a demonstration or proof of concept (POC). Most search products remain keyword-based at heart, and few have switched to full semantic search using NLT. Change here may continue to be slow, as the use of natural language (and particularly voice) remains limited and dependent on demographics. It is also generational, with natural language query and voice being a more natural digital interaction modality for the smartphone generation. Organizations need to prepare today or see their search engines fail to address the needs of natural language users and conversational interactions.

**Semantic Search: Understanding Natural Language to Discover Context and Intent**

We are increasingly hearing references to semantic search in the commerce space. Semantic search refers to search technologies that understand the meaning of the query and can provide more accurate results to natural language queries. The primary reason to understand meaning is to discover the customer context and intent, the holy grail of most search (and personalization) applications.

Semantic search is distinct from the traditional keyword search that underlies most current search engines. Keyword search looks to match one or more keywords to an index of items. It can determine things like the closeness or relevance of individual terms, but assigns no meaning to the terms, unless that meaning is manually curated as metadata. However, many keyword searches are actually natural language phrases, e.g., “small red dress.” “Dress” is a noun — the product being sought — while “red” and “small” are adjectives — both attributes of the product being sought. For keyword search to work well against this phrase, each of these terms must be in the index entry for the product to be matched to this query. Getting this right can be very complex and time-consuming, and it rarely works well at scale.

To enable semantic search, several approaches to understanding meaning are available, both mathematical (language-independent) and linguistic (language-dependent). A common linguistic approach is to use entity extraction NLU to determine the meaning of the query. This distinguishes nouns and adjectives (as well as other entities or word types), thus returning primarily dresses, not just anything red. Figure 3 shows how commerce search vendors are articulating this feature to prospects.
However, to work well, the index itself must also store and differentiate entities in the product catalog against each result. NLU can work equally well with product catalogues as with search queries, and can be used to improve the index. Graph technology, and more recently vector spaces, have been used to map the knowledge domain of the product set, as well as the types of queries entered by users. This has shown to radically improve semantic search, but can also be difficult to set up and maintain.

Some vendors are considering this technology as a first step toward conversational search. As well as providing answers (results), the search engine asks the next best question(s) of the customer. This itself is a first step toward truly conversational commerce.

Semantic search is just one evolving aspect of product discovery. Commerce search is a technically complex and evolving space. It is not something that is easy to build in-house, so it is most often found via specialist vendors. Many vendors in this Market Guide offer some capability, such as an add-on to provide a limited semantic search capability. For example, some vendors’ solutions may use catalog enrichment to make the product attributes consistent and ensure they contain the right attributes for searching. Few are semantic from the ground up. Where they are, this is pointed out in the vendor profile.
Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

Table 1 contains vendors and product summaries, including global coverage. Table 2 is a matrix of vendor support for the most important advanced commerce search features. This data was acquired via a direct survey of the included vendors. This is a list of representative vendors based on the criteria listed in the Market Description, and is not comprehensive.

Table 1: Commerce Search Vendors
(Enlarged table in Appendix)
Table 2: Digital Commerce Search Vendor Capability Matrix
(Enlarged table in Appendix)
Vendor Profiles

Adeptmind

Adeptmind Search is a multitenant SaaS platform, but can also be consumed as single-tenant SaaS. Adeptmind also sells “intent data as a service,” which helps understand customer intent. The product integrates with client storefronts via REST APIs.

Adeptmind is a recent startup (2016), and has expanded from its intent mining roots to provide a full commerce search solution, with a focus on providing AI-guided discovery. The majority of its full search solution clients use the tool via a Shopify plugin. Adeptmind states that its differentiators include its customer intent data, mined from social media, reviews and the web, and the signposts this data generates, plus product catalog enrichment using this intent data. Adeptmind provides productized integrations with Commercetools, Instacart, Salesforce Commerce Cloud B2C and Shopify.

The product is mainly used for B2C commerce and has over 350 clients, including Ulta Beauty, U.S. Polo Association, Staples USA and Decathlon USA.

Algolia

Algolia Search is a multitenant SaaS platform, but can also be deployed as a single-tenant platform for larger clients. Algolia also offers Algolia Recommend, a product recommendations solution, and Algolia Answers, a natural language question answering (NLQA) solution for knowledge-oriented applications. Algolia integrates with client storefronts via REST APIs, and provides client libraries in 11 programming languages and front-end framework libraries in six languages.

Algolia was initially differentiated by its fast query response (search as you type) and indexing, and has achieved rapid growth, especially among digitally mature midsize businesses. Algolia puts the developer at the center of their business, presenting as a headless platform, and is part of alliances such as MACH and Jamstack. It has extensive toolkits and out-of-the-box integrations to streamline the developer experience. Algolia states that its differentiators include: advanced relevance customization capabilities, which enable Algolia to attract businesses wishing to move away from open source without giving up its inherent flexibility; Algolia’s voice search, which supports dozens of major languages and platform integrations, though the product currently lacks query NLP; scalability (in 2021 serving over 100 billion queries a week); its AI-based relevance optimization; and its API-first approach.
Algolia provides productized integrations with Adobe Commerce (Magento), Shopify and Salesforce Commerce Cloud B2C.

The product is used for both B2C and B2B commerce. Although most customers are SMB, around 29% of the vendor’s revenue comes from large enterprises. It has over 5,000 digital commerce customers, including Lacoste, Coursera, Dunelm and STIHL.

**Algonomy**

Algonomy Find (previously part of RichRelevance, which merged with Manthan Software in 2021) is a multitenant SaaS product integrated with a wider personalization suite, which is a leader in our Magic Quadrant for Personalization Engines, and a customer data platform (CDP). The solution includes a “wisdom of crowd” behavioral learning algorithm and a real-time catalog update API. Catalog enrichment via NLU is available at additional cost. Algonomy Find integrates with client storefronts via REST APIs.

Algonomy focuses on omnichannel retail solutions that address online and in-store challenges for midsize-to-large retail organizations. It supports 20+ languages with semantic tokenizers for each. Pricing and currency can be managed per region in multicountry deployments. B2B capabilities are available, but are less well developed than those offered by some competitors. Geolocation-based search and AB/MVT testing are also lacking. Algonomy states that its differentiators include “wisdom of crowd,” real-time personalized results, real-time findability metrics and its “find, test, drive” user experience simulation.

Algonomy provides productized commerce integrations with Adobe Commerce (Magento), SAP Commerce Cloud, Shopify and VTEX.

The product is mainly used for B2C digital commerce and has over 180 customers, including Nelly, Atea, Journeys and MAF Carrefour.

**Attraqt**

Fredhopper Discovery Platform, Attraqt AI Search and Attraqt XO Search are multitenant SaaS, but can also be deployed as single-tenant SaaS. Product badging is a paid-for extension, and Attraqt also sells a personalisation engine, Attraqt Experience Orchestrator, which is a niche player in our Magic Quadrant for Personalization Engines due to its focus on digital commerce personalization. Integration with client storefronts is carried out via server-side APIs.
Two of Attraqt’s commerce search products are delivered on a stand-alone basis, while XO Search provides integration with its personalization engine, which is highly focused on digital commerce. Attraqt offers personalization algorithms optimized for industry verticals, as well as the ability to differentiate across various types of customer journeys and touchpoints. Visual merchandising is strong, and the AI Search product (new in 2021 following the acquisition of Aleph-One) combines NLP and NLU via deep learning, including behavioral data, to drive intent detection and reduce zero results. The integration of AI search with Attraqt’s other capabilities is ongoing, and reporting and analytics tools within the product are basic.

Attraqt states that its differentiators include its deep merchandising capabilities, AI search and native integration with its personalization engine. Productized commerce integrations include Adobe Commerce (Magento), BigCommerce, commercetools and SAP Commerce Cloud.

It is used for both B2C and B2B commerce, with an EMEA focus, and typically serves larger enterprises, with over 180 customers including ASOS, Tommy Hilfiger, Superdry and Screwfix.

Bloomreach

Bloomreach Discovery is a multitenant SaaS platform, but clients have the option to run in a private SaaS environment. Bloomreach also offers a full digital experience platform (DXP), which is an innovator in our Magic Quadrant for Digital Experience Platforms. The vendor was named a Customers’ Choice in the 2021 Gartner Peer Insights ‘Voice of the Customer’: Digital Experience Platforms and recently acquired Exponea, a CDP and marketing automation suite. Bloomreach Discovery integrates with client storefronts via REST/JSON and GraphQL APIs.

Bloomreach, an early innovator in the “search and merch” space, has since evolved its GTM primarily as a DXP with global reach. Although the company’s focus is on the DXP, the product discovery capabilities are often purchased and implemented separately. Bloomreach has an offering for search, product discovery, merchandising and personalization via its Product Discovery solutions, managed via its a unified merchandiser toolset with some machine learning (ML) capabilities. Bloomreach states that its differentiators include integrated merchandising and search personalization (segmented ranking), automated synonym correction with reinforcement learning, and a semantic layer (English only) based on behavioral feedback, for intent detection.

The product is used for B2C and B2B commerce and has over 180 customers powering over 480 storefronts, including Next, Staples and HD Supply.

**Bridgeline**

Bridgeline offers Hawksearch Ecommerce Search, a managed hosted (private cloud) search engine focused on B2B use cases. Bridgeline also sells another, B2C-focused search product, Celebros, not covered in this Market Guide. Professional services are also available to support the product operationally. Hawksearch Ecommerce Search integrates with client storefronts via a REST API and provides JavaScript (React and Vue) SDKs.

Hawksearch Ecommerce Search is B2B-focused, where back-end data can be complex. Multiple content sources can be indexed and can connect to multiple front-end applications. Hawksearch enables customization and client-specific development without compromising the version updates. Bridgeline states that its differentiators include the core module, Hawksearch Search Information Manager ("Hawk SIM"), which includes AI that recognizes patterns, normalizes both indexed data and customer keywords and provides dimensional transformation, which is a common requirement for B2B commerce. It also tracks user behavior once on-site and enables Hawksearch to personalize the customer experience.

Hawksearch Ecommerce Search has productized connectors for BigCommerce, Salesforce, Sitefinity, Magento, WordPress, iDev Ecommerce and ROC Commerce.

Hawksearch Ecommerce Search supports both B2C and B2B, but most customers are midsize B2B. The company has a North America focus. It has over 300 customers, including State Electric Supply Co., American Payroll Association, Oriental Trading and Samaritan Health Services.

**Constructor**

Constructor Search and Constructor Product Discovery Platform are multitenant SaaS platforms. The architecture is modular, priced and consumable per module. It integrates with client storefronts via an out-of-the-box client library (HTML, CSS, JavaScript), a client-side API library and REST APIs.
Constructor is part of the MACH alliance and Jamstack community, and is highly focused on the developer experience. While it is a search product (as distinct from a search engine), it states that its most common competitors are the engines elasticsearch and SOLR. Constructor states that its differentiators include its glass box AI, which shows its relevance reasoning, detecting conversion-related activity for products across all clients to provide a large training corpus for its ML relevance algorithms.


The product is used for B2C and B2B commerce and enterprise marketplaces, targeting larger enterprise customers. Constructor has over 30 customers, including Sephora, Backcountry, American Eagle and Bonobos.

**Coveo**

Coveo Relevance Cloud is a multitenant SaaS platform. Coveo also offers an insight engine and is a Leader in our Magic Quadrant for Insight Engines. It integrates with client storefronts via REST APIs and provides a midsize client framework.

Coveo has evolved out of the customer service space, and can integrate search across many content types, such as customer service and knowledge bases. While it has been a Salesforce partner for some years, it has more recently entered the digital commerce market, and has seen increased traction. Coveo's acquisition of Tooso in 2019 has resulted in deeper use of ML techniques to improve semantic search and NLU. Coveo states that its differentiators include rich analytics, near-real-time price and inventory integration, AI that learns from the entire digital journey and its extensibility via its pipeline extension system.

Coveo provides productized commerce integrations with Salesforce (B2B and B2C), Microsoft Dynamics 365, Sitecore Experience Commerce and SAP Commerce Cloud.

The product is used for B2C and B2B digital commerce and supports complex and global use cases, with over 600 customers including Formica Group, Hearts On Fire, Rolex and Lee Valley.
EasyAsk

EasyAsk, EasyAsk Direct and EasyAskB2B are multitenant SaaS platforms. They integrate with client storefronts via a JSON/XML API, and EasyAsk provides a .NET library and a JSP tag library.

EasyAsk focuses on natural language technologies via linguistic analysis and semantic understanding of product catalogues. The search engine is built around NLP and NLU from the ground up, not keyword search. Uniquely among the vendors in this Market Guide, EasyAsk can natively support conversational commerce via a chatbot. EasyAsk states that its primary differentiator is its AI-driven natural language query engine, which is also used in a wide variety of use cases beyond digital commerce.

EasyAsk has productized integrations with Adobe Commerce (Magento), HCL Commerce and NetSuite SuiteCommerce.

The product is used for B2C and B2B digital commerce, with over 400 customers including Gardner-White, Steelcase, Eckler’s and Timberland.

Empathy

Empathy Platform modules can be consumed as multitenant or single-tenant SaaS, deployed as a PaaS or via managed hosted services. It integrates with client storefronts via REST APIs and provides the Interface X client component SDKs for web, iOS and Android.

Empathy supports product discovery experiences by understanding the emotional facets of product discovery, seeing commerce as an emotional act, and providing features focused on end-user trust, understanding and joy. Empathy provides a broad set of microservice-backed APIs to drive product discovery. The company states that its differentiators are its focus on trust and privacy (zero-party data, with customers remaining in control of their data), a modular architecture which can be deployed in an incremental or progressive fashion, and its language-agnostic (mathematical) approach to conversational search that is enhanced by its expressive UI components (Interface X). This can be augmented by client-provided domain-specific natural language libraries.

Empathy provides productized digital commerce platform integrations with Shopify, Shopify Plus, BigCommerce and Magento.

Empathy typically serves the larger enterprise B2C retail digital commerce sector, with over 90 customers including MusicMagpie (Declutter in the US), Carrefour, Zara and Kroger.
epoq

Epooq Search is a multitenant SaaS platform that can also be deployed as single-tenant SaaS. Epooq goes to market as a one-to-one personalization platform for digital commerce, and also offers epooq Inspire (recommendations), epooq Stream (personalized landing pages), epooq Advise (product finder/guided selling) and epooq Connect (personalized email/newsletter recommendations). Managed services for campaign management and search tuning of the search product are also available. Epooq integrates with client storefronts via JavaScript and HTML substitution.

Epooq provides a modular set of capabilities around its semantic search product, but primarily focuses on its personalization capabilities, especially one-to-one hyperpersonalization of search via behavioural analytics. Epooq states that its differentiators are its focus on elevating the CX to one-to-one personalization across the entire customer journey and the customizable nature of its services for individual clients.

Epooq provides a platform-agnostic API with productized digital commerce platform integrations with Shopify, Shopify Plus, BigCommerce, Shopware, Magento and Salesforce Commerce Cloud (B2C).

The product is used for B2C and B2B digital commerce and supports complex use cases, with over 120 customers including Villeroy & Boch, BabyMarkt, ROSE Bikes and Eterna.

FACT-Finder

FACT-Finder Next Generation is available as single-tenant SaaS or can be deployed as a managed hosted (private cloud) solution or on-premises. It is a modular platform whose core features include search, suggestions, analytics and A/B testing. Other functionalities, such as personalization, visual merchandising, geolocation search and predictive basket (an AI that can predict your shopping basket based on buying patterns), can be added at an additional cost. FACT-Finder also offers a separate B2B suite version of the product. The product integrates with client storefronts via REST APIs, and FACT-Finder provides client SDKs and web components for integration.

FACT-Finder uses proprietary, patented search technology for error-tolerant searching and language-independent (phonetic) query understanding, and has proprietary ML algorithms. The solution currently lacks voice search and advanced multivariate testing. FACT-Finder states that its differentiators include its proprietary search technology, ease of integration, B2B-specific features such as customer-specific pricing, and its predictive basket AI, which uses, among other things, buying cycle analysis (time, frequency, need) and seasonal variations to predict regular shopping list content.
FACT-Finder has no productized commerce platform integrations, but provides an SDK that has been used to integrate with digital commerce platforms such as Intershop, Spryker, Shopware, SAP Commerce Cloud and Adobe Commerce (Magento).

The product is used for B2C and B2B digital commerce and has over 550 customers running on 1800 storefronts, mostly in EMEA, including Elkjøp Nordic, Mytheresa, Berner Group and OBI.

**GroupBy**

GroupBy AI Search is a multitenant SaaS platform, but can also be deployed as single-tenant SaaS or PaaS. It is a core component of GroupBy Product Discovery Suite, a wider set of product discovery and experience capabilities including data enrichment, ETL, navigation, merchandising, analytics, SEO optimization and a content management system (CMS). Implementation and operational professional services come at no extra cost, and GroupBy AI Search integrates via server-side API or a client-side JavaScript API.

GroupBy provides an extended product discovery scope, with a focus on clients with complex requirements for both B2C and B2B, and provides active ongoing operational support. GroupBy states that its differentiators include its data enrichment, merchandising capabilities via command center, ML-based system and ETL services that improve the search index and catalog navigation.

The GroupBy AI Search product is used for B2C and B2B digital commerce for larger enterprises, and has over 40 customers including Bed Bath & Beyond, CVS Pharmacy, BJ’s Wholesale Club and Crate and Barrel.

**Kibo**

Kibo Personalized Site Search (previously part of Certona) is a multitenant SaaS platform. An additional module is Predictive Visual Search (type-ahead). Kibo is a digital commerce platform vendor, and is a niche player in Gartner's Magic Quadrant for Digital Commerce, though the product discovery solution can be purchased separately. Kibo also offers a personalized product finder and, via its acquisition of Certona and Monetate, is also recognized as a leader in personalization platforms in the Magic Quadrant for Personalization Engines. The search product is integrated with storefronts via server-side REST APIs.
Kibo Personalized Site Search is a module of a wider personalization platform, and is usually procured as part of that as an end-to-end digital channel personalization engine. Its semantic/NLU capabilities are rudimentary. Kibo states that its three key differentiators are its relevancy tuning tools, visual search merchandising and personalization capabilities.

Kibo connects with multiple digital commerce platforms via an integrated iPaaS, Tray.io.

The product is mainly used for B2C digital commerce and has over 15 customers, including Ace Hardware, Giant Tiger and Home Hardware

**Klevu**

Klevu Smart Search is a multitenant SaaS platform with a strong focus on retail commerce conversion optimization via search, merchandising and recommendations. It integrates with client storefronts either via an API, XML feed or JavaScript.

Klevu’s Smart Search core capabilities include AI-powered semantic search with NLP at the core, enhanced via text engineering analysis of unstructured data. It can power voice search out of the box with embedded NLU. Klevu states that its differentiators include its powerful AI capabilities for product discovery, ease of integration with major digital commerce platforms and affordability. A conversational commerce shopping assistant is in beta.

Klevu provides productized digital commerce platform integrations with Shopify, Shopify Plus, BigCommerce, Magento and Salesforce Commerce Cloud (B2C).

It is used for B2C digital commerce and has over 3,300 customers, mainly SMB, including PUMA, MADE.COM, Bulk Powders and Bulletproof.

**Lucidworks**

Lucidworks Fusion is usually deployed as a single-tenant PaaS, but can also be deployed on-premises. The core platform is based on SOLR, and Lucidworks Smart Answers NLQA and the Predictive Merchandiser UI are optional modules available at additional cost. Lucidworks is applied in many use cases beyond digital commerce. The company also offers an insight engine and is a leader in Gartner’s Magic Quadrant for Insight Engines. A SaaS version of Fusion is in development. It integrates with client storefronts via an integrated server-side API.
Lucidworks targets larger enterprise customers with more complex product discovery requirements, and integrates search across many content types, such as customer service and knowledge bases. Contracts typically include professional services and support, with customization for larger-scale implementations. Lucidworks states that its differentiators include its connected experience cloud (which also powers the insight engine use cases) and its emerging semantic vector search for NLU.

Lucidworks provides productized digital commerce integrations with Oracle CX Commerce, SAP Commerce Cloud, commercetools, HCL Commerce and Salesforce Commerce Cloud (B2C).

The product is used for B2C and B2B digital commerce and has over 180 customers, including Lenovo, REI, Costco Wholesale, Nike and Lululemon.

**Luigi’s Box**

Luigi’s Box Search is a multitenant SaaS platform, but can also be deployed as single-tenant. Luigi’s Box takes a modular approach to its product discovery solution, which includes search, a recommendation engine and a search analytics engine. Offline A/B testing, a crawler for content updates and voice search are available at extra cost. Luigi’s Box Search integrates with client storefronts via JavaScript tags or API.

Luigi’s Box is interesting in that, in addition to having its own digital commerce search capability, it has an entirely separate search analytics and optimization toolset that can be used with any search engine. The core search capabilities include a proprietary technology to semi-automate synonym detection in any language. Luigi’s Box states that its differentiators include performance (response speed), the search analytics tool, offline A/B testing and its results ranking ML.

Productized commerce integrations include Adobe Commerce (Magento), Shopware, WooCommerce, PrestaShop and Shoptet.

The product is used for B2C digital commerce and has over 300 customers, mostly in EMEA, including O2, MALL GROUP, BENU (PHOENIX group), and Electronic Star (Berlin Brands Group).
Prefixbox

Prefixbox is a multitenant SaaS platform with a search analytics core and three independent product discovery components: autocomplete, related searches, and the semantic search engine. Additional capabilities (available at no extra cost) include synonym mining plus prediction, multistore catalog and real-time product data updates. Additional capabilities available at extra cost include brand promotions, category navigation and image search. The solution integrates with client storefronts via a front-end JavaScript plugin or API integration.

Prefixbox is a semantic search product that uses NLP and NLU technologies. The three product discovery components are built on top of the independent core search analytics platform. Prefixbox states that its differentiators include best-in-class search analytics and A/B testing.

Prefixbox provides a productized digital commerce platform integration with Adobe (Magento).

The product is used for both B2C and B2B digital commerce but with a focus on retailers, and Prefixbox has over 60 customers, including Rossmann, Auchan Retail, Praktiker and MediaMarkt.

Reflektion

Reflektion Commerce Search is a multitenant SaaS platform. It is a module of Reflektion’s wider Digital Commerce Experience Platform, which tackles the wider product discovery scope (including the PDP). Email recommendations and a headless CMS are also available. The search product integrates with client storefronts via API, and also has prebuilt JavaScript SDKs.

Reflektion brings a holistic approach to optimizing the end-to-end product discovery journey, going further than most other vendors in this space. B2B digital commerce is also supported, including catalog normalization and augmentation, and a vertical-specific spare parts fitment search. Reflektion states that its differentiators are based around its wider digital experience stack, analytics to support search improvement, and unified retail capabilities to solve BOPIS/click-and-collect via store-specific real-time product inventory and price.

Productized digital commerce platform integrations include Shopify, Magento, NetSuite SuiteCommerce, SAP Commerce Cloud, BigCommerce, Salesforce Commerce Cloud (B2C), Oracle CX Commerce and HCL Commerce.
It is used for both B2C and B2B digital commerce, but with a focus on retailers, and has over 200 customers including Skechers, Ulta Beauty, Rite Aid and Finish Line.

**Searchspring**

Searchspring Ecommerce Site Search is a multitenant SaaS platform. It takes a modular approach to improving product discovery through search and merchandising solutions, navigation, personalized product recommendations, reporting and insights and a product finder. The product integrates with client storefronts via API. Searchspring also offers Searchspring Studio, a search UI design tool, either on a stand-alone basis or through its top-tier implementation.

Searchspring's core search functionality includes semantic search, NLP and data intelligence. The product discovery features include extended customer behavior and engagement tools, with a business user focus on the merchandiser role. In 2020 Searchspring acquired 4-Tell and integrated the technology to enhance its personalization capabilities. Searchspring states that its differentiators include its retail focus and proprietary algorithm, a blend of AI and NLP, and semantic search principles focused on customer intent detection.

Searchspring provides productized commerce integrations with Shopify, BigCommerce, Volusion, Magento, 3Dcart, Netsuite SuiteCommerce, WooCommerce, Miva and SAP Commerce Cloud.

The product focuses on B2C digital commerce, also supports B2B, and has over 2,500 customers including Volcom, Specialized, Peet's Coffee and Rip Curl.

**Unbxd**

Unbxd Site Search is a multitenant SaaS platform that can also be deployed as single-tenant. It is also available via Google Cloud Marketplace. Unbxd takes a modular approach to its product discovery solution and includes the following components: PIM, site search, browse and recommendations. Unbxd also offers services around the PIM product and PDP creation. The search product integrates with client storefronts via APIs or JavaScript SDK, plus native-app SDKs for both iOS and Android.
Unbxd offers an end-to-end product discovery suite with its products, and includes both a B2C merchandising focus and B2B search features. Many customers choose to use the optional PIM for catalog normalization and enrichment. Semantic search is available as an add-on to its core keyword-based search engine. Unbxd states that its differentiators include optional AI tuned for vertical intelligence, domain-specific semantic models created using a mix of NLP, named entity recognition (NER) and query category predictor (QCP). Unbxd also features automated site search setup while enabling merchandisers to retain control over the ML algorithms.

Unbxd provides productized digital commerce integrations with Adobe Commerce (Magento), BigCommerce, SAP Commerce Cloud and Shopify.

The product is used for both B2C and B2B digital commerce with a particular focus on larger retailers, and has over 150 customers including HSN, Express, Ashley HomeStores and Advance Auto Parts.

**Market Recommendations**

- Evaluate the commerce search vendors listed in this guide to significantly enhance digital commerce product discovery or compose a new digital commerce platform.
- Implement commerce search without the need to own software, fully replatform or change other components, such as the commerce engine, DXP, WCM or PIM systems.
- Consider the importance of personalization across your whole digital estate to aid vendor selection for product discovery.
- Prepare for NLU search today to address the needs of the coming natural language users.

**Evidence**

Gartner's 2020 B2B Digital Commerce Survey was conducted online from 27 October through 15 December 2020 among a total of 379 respondents in North America (n = 173), Western Europe (n = 135) and Asia/Pacific (n = 71). Respondents were either required to be at selling or purchasing organizations, with selling organizations representing North America (n = 85), Western Europe (n = 63) and Asia/Pacific (n = 33), while the purchasing organizations represented North America (n = 88), Western Europe (n = 72) and Asia/Pacific (n = 38).

Qualifying organizations span various industries. Organizations were required to have at least 250 employees and to be either business-focused or a blend of business- and IT-focused.

Respondents were required to be at director-level or above and work in a department relevant to sales or procurement. Respondents working in sales had to sell to businesses and currently use, or plan to use in the next three years, websites for B2B sales. Respondents working in procurement had to purchase products/services from other businesses and currently use, or plan to use in the next three years, websites for B2B purchases.

Quotas were applied for countries/regions and sales/procurement modules.

The study was developed collaboratively by Gartner analysts and the Primary Research Team.

Disclaimer: The results of this survey do not represent “global” findings or the market as a whole, but reflect the sentiment of the respondents and companies surveyed.

**Note 1: Representative Vendor Selection**

The chosen attributes of the representative vendors are:

- Rich autocomplete
- Boost, bury and hide
- Content search and other content types integrated with product search
- Modal “quick view” of products in results
- Visual merchandising
- Multiple search language support
This is not a comprehensive list of capabilities (See Note 2). All vendors included in this Market Guide have these capabilities, but depth and functionality varies widely in certain areas. For example, personalization capabilities vary from a basic segmentation engine working with searching data only, via native integration, to a full first-party personalization engine and CDP, for use across the whole digital domain. Similarly, semantic search support varies widely, from search index improvement, via autotagging, to full entity extraction via query NLU and use of domain ontologies for inference and to understand intent.

**Note 2: Commerce Search Features**

- Search analytics
- Product recommendation engine (contextual, product substitution, complementary, etc.)
- Category navigation and replacing a static taxonomy (catalog browse) up to (but not including) PDP
- Personalization: Native (segmentation and rules) engine
- Personalization: One-to-one individualized personalization based on clickstream and/or profile
- Support for semantic search via natural language technologies
Standard Search Engine Capabilities

- Text processing: Stemming, concatenation, phrase search, spell-checking (autocorrect and/or fuzzy search)
- Synonym management
- Pagination and infinite scroll
- Partial and incremental indexing
- Redirection to specific landing page based on keywords
- Zero-result management and mitigation
- Breadcrumbs: Customer orientation
- Stop words and phrases
- Support for multiple search languages

Core Commerce Search Capabilities

- Rich autocomplete (search-as-you-type)
- Faceted navigation: Multiple, individually removable filters
- Range filtering: Sliders, text boxes
- Gallery and grid visual results layout management.
- Modal quick view of products in results
- Boost, bury and hide
- Results badging (sales, recommended, discount, offer visualizations, etc.)
- Relevance tuning by attribute weighting
- Web content search and other content types (e.g., helpdesk, video) alongside and integrated with product search
- Search analytics dashboard
Advanced Capabilities Expected From Commerce Search Vendors

- Product recommendation engine (contextual, product substitution, complementary, etc.)
- Geolocation-based search
- AI-based relevance rank tuning
- A/B and/or MVT testing of ranking
- Catalog enrichment (pre-indexing)
- Browse: category navigation and replacing a static taxonomy (catalog browse) up to but not including PDP
- Browse: SEO support, including long tail.
- Browse: Campaign/marketing/category landing page semiautomation
- Merchandising: Visual merchandising tool
- Merchandising: Rule-based display of specific results.
- Merchandising: Rule-based insertion of promo elements/content/banners into results
- Merchandising: A/B and/or MVT testing of content/results
- Personalization: Native (segmentation and rules) engine
- Personalization: Personalization of results (e.g., using external personalization engine data)
- Personalization: One-to-one individualized personalization based on clickstream and/or profile
- Semantic search: Natural language entity extraction and NLU
- Semantic search: Query NLP
- Semantic search: Catalog enrichment based on NLP of unstructured data in the product catalog, on ingestion.
- Semantic search: Voice search support
- Semantic search: Product domain understanding based on graph technology or vector spaces, applying DNN or other advanced ML techniques to support semantic search.

- Semantic search: Enables a search dialogue (e.g., via chatbot integration) and/or dynamic search suggestions enabling contextual expansion of queries via a dialogue.

- B2B search: Multiple SKU reconciliation and custom SKUs

- B2B search: SKU search

- B2B search: Advanced data cleansing, normalization and enrichment

- B2B search: Search catalog scope limited by customer account/role

- B2B search: Dimensional (weights and measures) transformation

**Adjacent Capabilities**

- Product finder: Using human-centred attributes

- Gift finder

- Visual search: Image recognition

- NLQA/knowledge base search

**Document Revision History**


*Market Guide for Digital Commerce Search - 12 January 2017*

**Recommended by the Author**

Some documents may not be available as part of your current Gartner subscription.

- Survey Analysis: 9 Key Trends in Digital Commerce Adoption
- Choose the Right Digital Commerce Platform Architecture
- Scaling Digital Commerce Requires Product Content Life Cycle Optimization
- Composable Commerce Must Be Adopted for the Future of Applications
Adopt a Composable DXP Strategy to Future-Proof Your Tech Stack

Industry Vision: Commerce to You

Harness the Core Capabilities of a Digital Commerce Platform

Magic Quadrant for Insight Engines
# Table 1: Commerce Search Vendors

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- Bratislava, Slovakia
- Montreal, Quebec, Canada
- San Francisco, California, U.S.
- New York, U.S.
- London, U.K.
- Redwood City, California, U.S.
- London, U.K.
- Cambridge U.K.
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Source: Gartner (August 2021)
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Source: Gartner (August 2021)