



2023 Enterprise Tech Report
on Search and AI

Frustrated, Faltering, and Feeling Ignored

We surveyed more than 600 tech professionals to discover how they really feel about their enterprise search initiatives. The results call for a centralized approach.



Search Is Flying Under the Radar

As technology advancements continue to accelerate, core and fundamental technologies including search continue to fly under the radar.



But search is a critical capability, influencing many areas of our lives personally and professionally, yet only when search is bad does anyone notice, and then, everyone does.

When we look at the values that search delivers, it's easy to see it as the foundation to any business innovation. But the seeming mystery of infrastructure to business leaders perennially leaves search taken for granted.

This is more apparent in the results of our second annual Enterprise Tech Report on Search and AI. More than 600 IT, technology, and business stakeholders stated that company leadership prioritizes and values delivering relevant information to customers and employees, but that does not always translate to prioritizing strong enterprise search capabilities.

Specifically, 81% say that getting CEOs and other management to engage with the rest of the organization about search is difficult (although they do care deeply that information can be found easily). Whether it be for commerce, service, or analytics, search is the backbone for making sure timely, relevant, and personalized information is ready as needed.

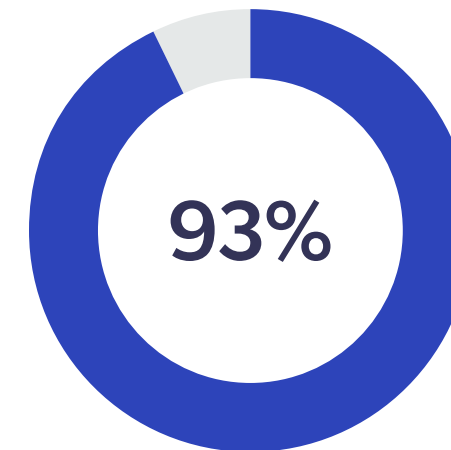
Our respondents revealed details of the challenges they are facing — and how they're tackling the problem.

Great Search Is the Backbone to Digital Transformation

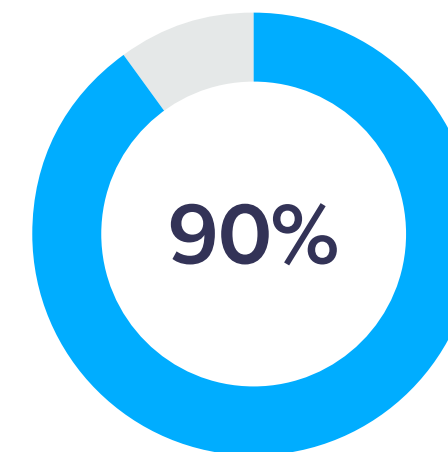
A key business imperative for nearly every organization is “digital transformation.” And while there is no consensus on what that fully encompasses, there is an understanding that it has something to do with aggregating information sources, making things easier to find, modernizing interfaces, and being able to discover information from unstructured data sources. And of course, this should all be easy.

Indeed in our survey we focused on the results rather than the means to getting there. There is, throughout most organizations, the goal to use technology to improve efficiencies, increase revenue, and decrease costs. This usually gets defined as digital transformation.

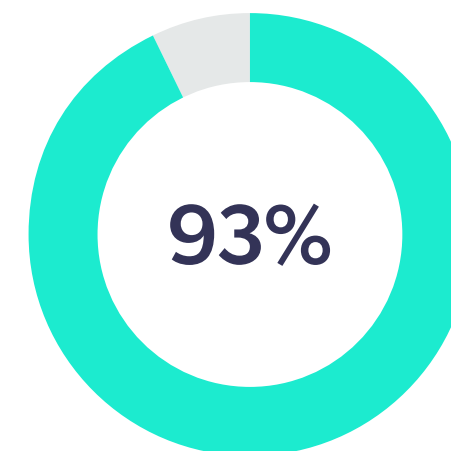
When we asked our respondents to look at the value drivers for enterprise search, we had broad consensus. Indeed throughout our survey, we focused on the results rather than the means to getting there.



say that delivering relevant information to web visitors is very important to our business



say the inclusion of unstructured data in search analytics is very important



say search analytics is a great source of business intelligence

84%

**See Search as Critical
to Driving Digital
Transformation**

Search Analytics Reveal Digital Gaps

So why is search so important?

People don't lie to the search box. If you look closely at search log files you can determine intent, what is missing, and what is broken. Which is why 92% of our organizations use search analytics for improvements.

The biggest initiative with search analytics (67%) is in improving a user's digital journey. More than half of respondents leverage them to profile user preferences and audience attributes (56%), or to inform additional content needs (52%). All of which reinforce the value that search brings to businesses in understanding and personalizing digital experiences for their key stakeholders.

Value drivers for search analytics

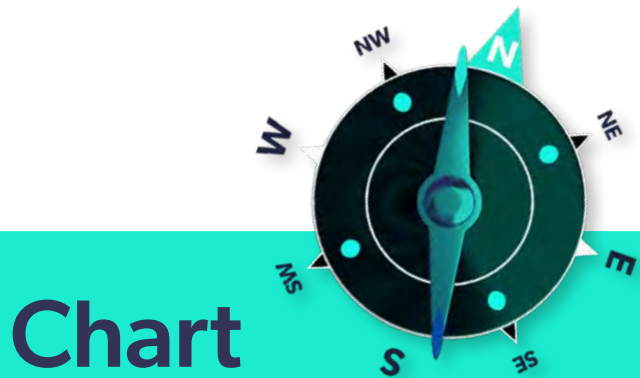


Chart your course!

Consider using search analytics to enhance your overall business and digital capabilities including but not limited to business development, to prioritize research areas, and extract information from forms and other unstructured content.

Making Every Business Process Efficient and Effective

Improving search is an ongoing process. Interestingly, the focus of investments have shifted in the past year towards improvements in both employee and customer self-service portals — perhaps in response to not being able to hire, retain, or enable headcount effectively.

Marketing channels such as mobile apps or external sites including ecommerce and online communities saw relatively minor increases in investment. This may be due to enterprises looking to test internally before experimenting more broadly, but it could also reflect changing attitudes toward employee experience and the direct correlation to customer experience.

98%

Say Organizations Invested in Improving Search Capabilities

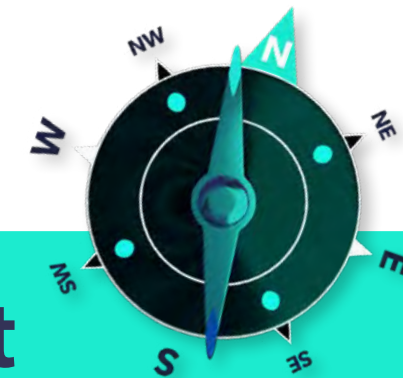
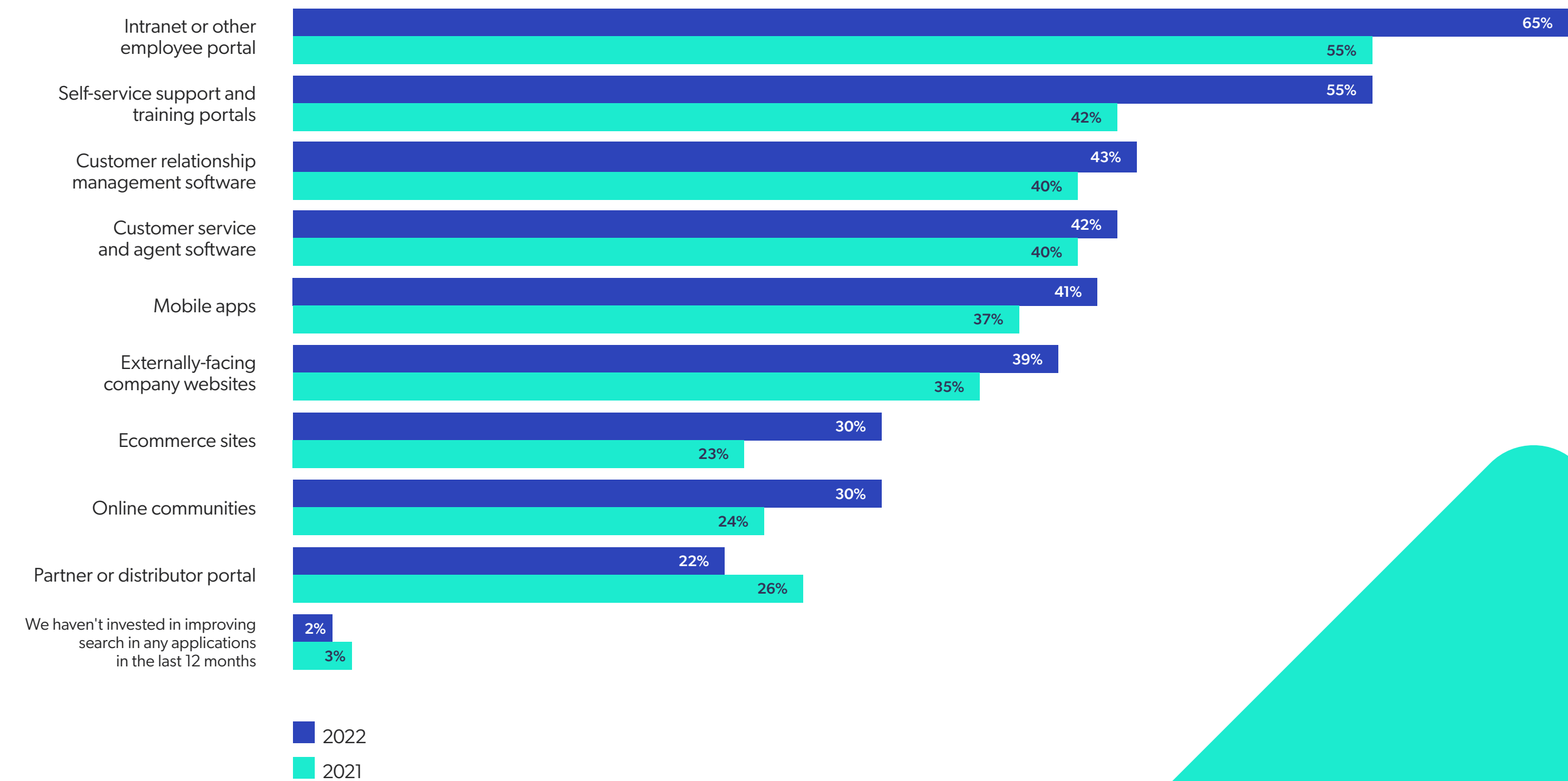


Chart your course!

Consider taking a holistic approach to your organization's content and product needs. Search is an agnostic technology that can help you drive a total experience strategy that crosses employee, customer, prospect, and partner stakeholders.

Search improvement initiatives were found throughout organizations



Executive Engagement Is Lacking

Despite its importance — and the value that is demanded of great search — executive engagement is lacking.

Nearly all our respondents (96%) indicate that there is a disconnect between the need for search functionality and the business support and prioritization received. Some of the business challenges include the following.



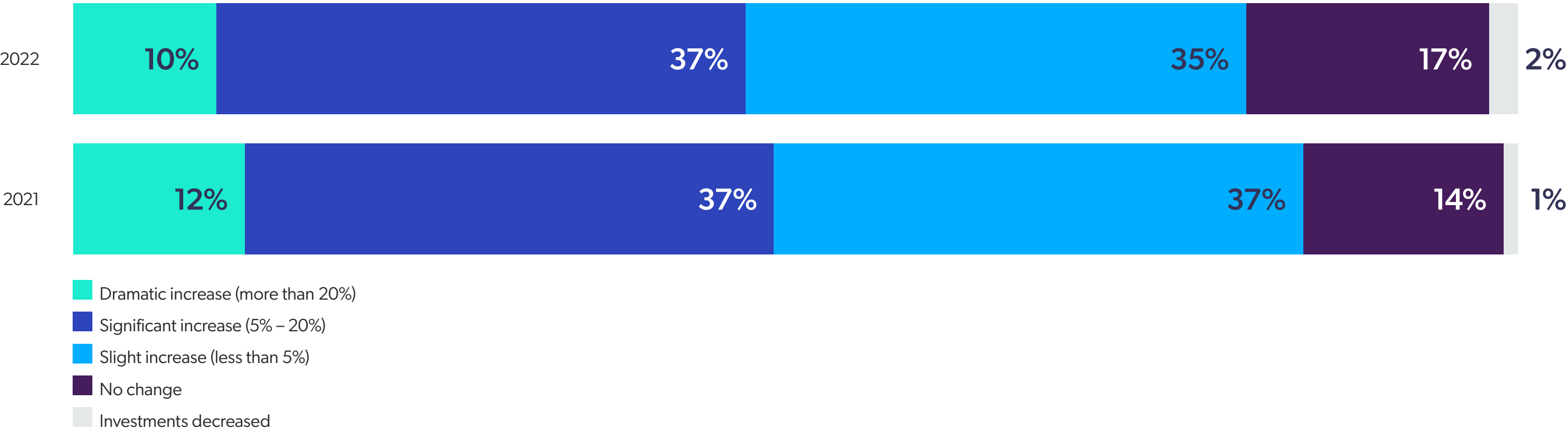
Chart your course!

Search is complex. Consider monthly lunch-and-learns with stakeholders.

Funding Reveals the Paradox

In an economy where departments have to do more with less, and in light of executive absence from offering guidance, surprisingly, enterprise search initiatives continue to be well-funded. Similar to last year, enterprise search platform budgets are still rising — with only 2% saying they decreased (a one point increase from 2021).

How has your organization' investment in enterprise search technology changed over the past 12 months?



Investments in talent continue, with executives more likely to report an increase in talent investments than managers and practitioners.

96% Struggle To Find Expertise

More than half say that investment in recruiting, training, and retaining enterprise search talent has increased — with another 40% saying they are staying even. But that investment in search expertise is met with the challenge of being able to find the right people for the job.

This may also be impacting the availability of AI-powered search capabilities, as we observed no year-over-year change in our research. As advanced search becomes a medium for transformation, the types of skills required continue to grow. The need for search administrators is surpassed by the need for data scientists, data administrators, and even front-end designers.

What type of expertise does your organization struggle to find for your enterprise search program?

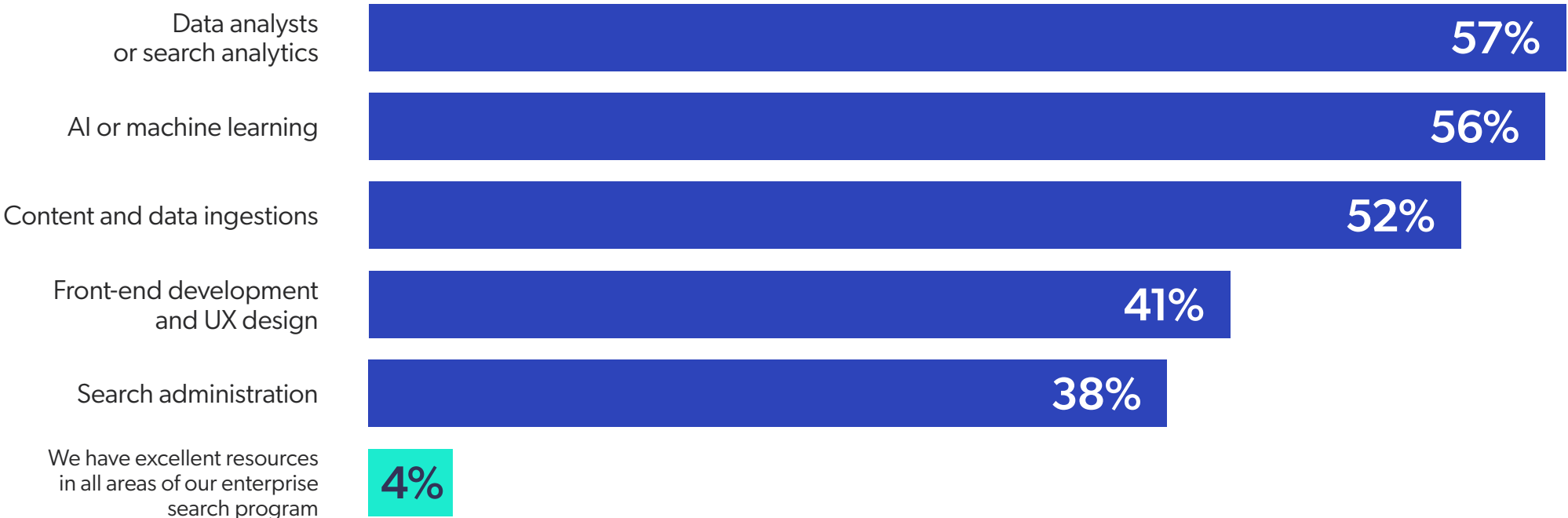


Chart your course!

A "search-as-a-service" solution with out-of-the-box AI capabilities can help shore up gaps in internal headcount — particularly with large volumes of content and multiple data sources that each require AI for scalability.

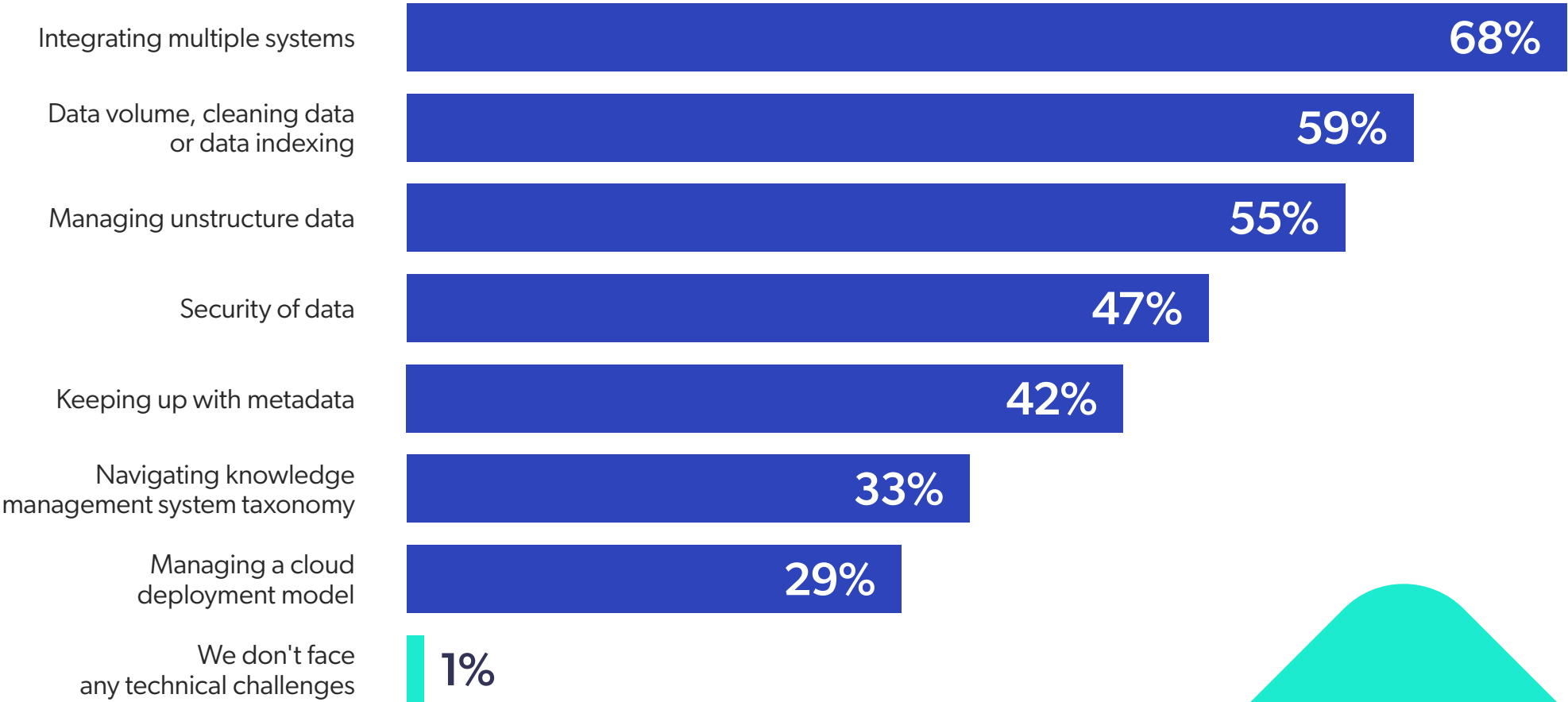
99% Report Technical Challenges

Besides a lack in ability to source top talent, or because of it, a slew of technical challenges continue to plague respondents — with data integration topping the list. More than two-thirds of search teams (68%) say that integrating systems is a big challenge — one that continues to grow with the continual explosion in data and content.

Other issues that complicate successful search include security of data and indexing of unstructured text.

Technical challenges vary by industry. Software and financial services companies face more security issues, while ecommerce enterprises face challenges around data volume and renewal.

What technical challenges does your organization face with enterprise search?



And as a result, as in 2021, tech professionals continue to have delays in search deployments.



Chart your course!

Secure digital transformation via intelligent search platforms is possible. Look for vendors that offer early binding security as part of their indexing process and capability. While not only more secure, it's also faster since it builds the permissions of each document right into the index.

Search Intent Is Still Out of Reach

To be clear, while enterprise leaders are investing in search, that might not translate to the gains they want. For example, the survey found that enterprises customize search results for given users using role-based controls (63%), relevance based on historical aggregate data (62%), relevance based on real-time data (51%), and location (42%).

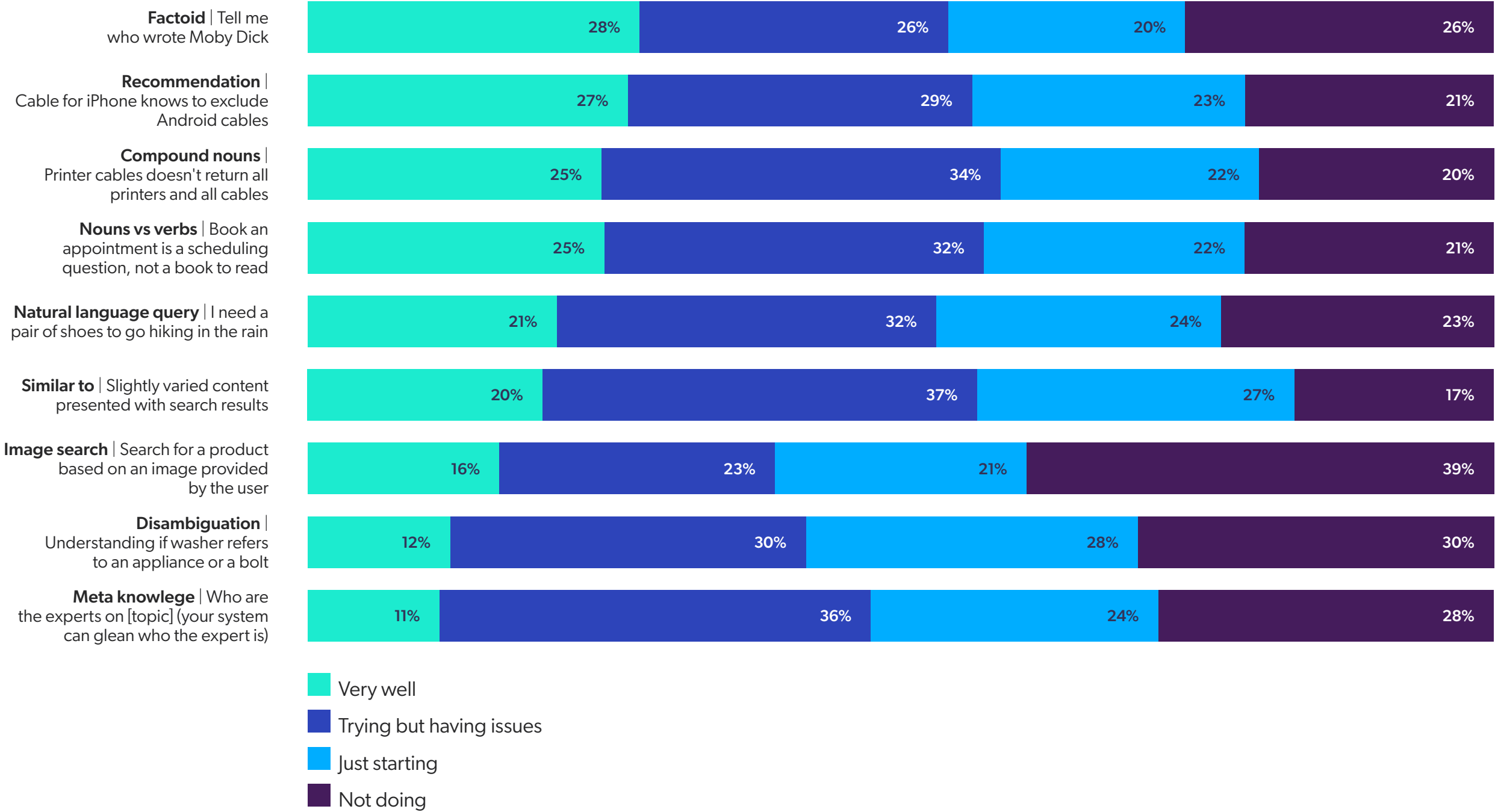
Those are all useful and valid search tools, but they still don't let users find results like natural language queries or ones that match true intent. The chart on the next page shows a breakdown of query types and how well respondents are able to serve them.



Chart your course!

Leveraging semantic signals (using language models) combined with behavioral signals (historical and real time user history, custom context — role based) can help in understanding the intent of your searchers/queries/user.

For each of the following types of search queries, please indicate how well your organization implements these across your enterprise search program.



99%
**Say They Are Manually
Tuning Search**

Search Centers of Excellence Aim To Deliver on Digital Transformation Promises

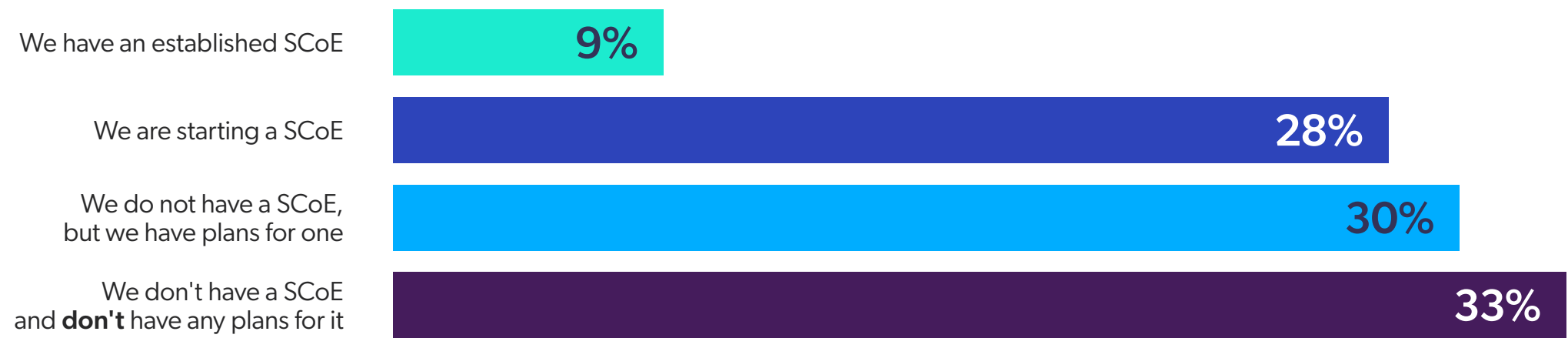
Given the barriers to implementing great search (and reaping its benefits), the solution is a Search Center of Excellence (SCoE). A SCoE is a cross-functional team of experts who advise department and business unit teams on an organization's search capabilities and how they are evolving so that those teams can improve customer and employee web experiences.

The SCoE leads the organization as a whole in search technology adoption, migration, operations, security, and enabling business outcomes.

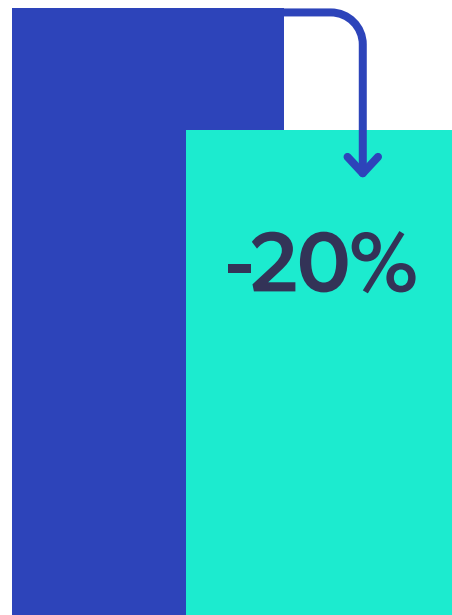
Our research reveals that this isn't a new idea to the search industry, but not many (only 9%) have successfully adapted it for their organization. Still, interest in establishing one (67%) is strong.

Similar to other observations in our research, the executive level had a different perspective on their SCoE maturity (72%) than managers (67%) and practitioners (64%).

Given this definition, do you consider your company to have a SCoE?



Can a SCoE Satisfy AI Skepticism?



Optimism about AI use cases for the enterprise saw a nearly 20% decrease year over year.

This seems to be reflected mainly in the ecommerce sector, as software and financial services organizations remained strong believers and optimistic about AI's potential.

The challenges to adopting AI remained the same as in 2021: other IT priorities (58%), lack of resources to deploy and manage (48%), AI needing more training/create work (37%), retaining control over search ranking and results (29%), and an alarming rise in not perceiving the value of AI for search (19%).

While we agree that AI is not a silver bullet, its benefits will be unique to each organization and use case where it appears. A SCoE can better evaluate options and decide how to best approach using AI within its search deployment.



Chart your course!

Consider including external perspectives in your SCoE to get a well-rounded view of AI and its potential.

Accelerate Transformation by Revisiting Fundamental Capabilities

The paradox of search continues. It is both a fundamental and essential enterprise capability that every company needs, yet very few prioritize or get right. The benefits are clear, and the indicators of success (or failure) are even more evident.

As you think through your enterprise tech stack and consider key capabilities that can accelerate your efforts, AI-powered search is a critical need that must be prioritized and centralized. Considered a force multiplying technology, it can transform both customer and employee digital experiences while reducing the technical debt and deployment load on your development teams.

Research Methodology

Dimensional Research surveyed 610 independent IT or technology stakeholders with responsibility for business applications that included search capabilities. All had direct responsibility for their organization's enterprise search capabilities. "Enterprise search" was defined to refer to software that ingests, understands, organizes, and queries digital content from multiple data sources, including those used for web and ecommerce, customer service and knowledge access.

Responses were captured between November 1-14, 2022.

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