Yijun Shen

Application: NBER Digital Economics and AI Tutorial

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Graduate study

I am a fourth-year Ph.D. student in Economics at the University of Virginia, enrolled since 2023. My graduate coursework includes industrial organization, labor economics, experimental economics, and international trade. I previously earned an M.S. in Computational and Behavioral Economics at Chapman University (2021-2023).

Research interests

Keywords: Empirical IO, search, AI, platform

My research lies in empirical industrial organization, with a focus on consumer search, AI, and digital platforms. I study how platform design and information intermediaries shape consumers' information acquisition, product consideration, and purchase decisions. My broader aim is to understand how these demand-side mechanisms affect platform strategies, competition, and consumer welfare.

Dissertation research

Committee: Simon Anderson, Alexander MacKay, and Ahnaf Rafi.

1. Demand Spillovers in Digital Platform Ecosystems

How does combining distinct services within one platform reshape consumer demand and competition across markets? Using linked transaction data from a large Chinese e-commerce and instant-delivery ecosystem, I study demand across services as consumers begin using both. My analyses show that delivery adoption is associated with more persistent e-commerce demand among existing customers in the integrated environment, while users of both services exhibit stronger growth in delivery demand than delivery-only users. These findings suggest that sustaining demand across services is an important source of ecosystem value. My next step is to investigate the mechanisms behind these patterns, distinguishing the roles of lower search costs, information and personalization, and promotional incentives in shaping demand across services.

2. Information Intermediaries in Consumer Search

This paper proposes a structural empirical analysis of consumer search with information intermediaries. Product inspection often leaves uncertainty about match value. Therefore, consumers actively acquire information from online intermediaries, shaping the direction and depth of search and their eventual purchase decisions. Using Comscore browsing histories and search queries, I plan to model consumers' joint decisions about which products to inspect and which information sources to consult. Reviews, buying guides, and comparison sites can both introduce alternatives and help evaluate products already under consideration. The central question is how these intermediaries shape search paths, consideration sets, and product substitution. The goal is to distinguish consumer preferences from the information environment that brings products into consideration, and assess the implications for competition and consumer welfare.

Building on this project, I am interested in AI assistants as information intermediaries that can both recommend products and help consumers evaluate alternatives. I ask when AI substitutes for traditional intermediaries, such as review sites and buying guides, and when it complements them by encouraging further comparison or verification. My aim is to understand how these interactions reshape consumers' allocation of search effort, consideration sets, and purchase behavior, and what they imply for competition and consumer welfare.