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social search: the discovery revolution

introduction

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The way that consumers search and discover brands and information is undergoing significant shifts, with new tools and sources being used in addition to classic search engine results pages. Whether it is searches within commerce environments, social media, AI results in traditional search engines, or the myriad of new AI LLMs, brands need to think about how people find them and what information is surfaced.

This paper provides a rundown on the growth of social search, where consumers are using social media for active discovery and not just algorithm driven content.

social search: the discovery revolution

If there is one thing our industry loves, it is declaring a new era. We have lived through the rise of mobile; we have adapted to digital; we were there for the golden age of TV (not us). And now, here we are again, standing at the edge of something just as disruptive. One of the forces changing the game is AI, but the other, arguably more immediate and greater opportunities for brands and the media industry, is how people are searching. Not just what they are searching for, but where, how often, and why.

We have built an entire digital economy around the assumption that when someone needs an answer, they type it into a search engine. That is still happening, but now it is happening alongside a massive shift towards social platforms. Over 21 million Australians use social networking every month. With Facebook, Instagram, TikTok and Reddit all having Australian audiences of over 13 million monthly, these are no longer just places people scroll when they are bored.¹ They are actively being used to discover, compare, validate and make decisions.

social search: the discovery revolution

Nearly half of people online aged 16–34 declare that searching for products is one of the main reasons that they use social media.²

In a 2024 Forbes Advisor study, 24% of American participants used these apps in ways traditionally reserved for search engines, and 13% purchased directly within these apps. The study pointed towards TikTok being a favoured discovery method for Gen Z in particular.³

Reddit is having a moment too, with Australian audiences increasing over 40% year on year and now reaching over 17 million Australians each month.⁴ Their forums have become a much-used source of authentic, crowd-generated knowledge. YouTube, often forgotten in the social platform conversation, is the world's third-largest social platform and growing, especially as a search-first destination.

Meta is a leader too. In particular, the popularity of IG Reels and their recent launch of Meta AI, baked directly into the core apps, is a clear signal they are not just watching this shift, they are betting on it. And TikTok is not just riding the wave either. Their new Search Ads offering, rolling out in Australia now, lets advertisers target keywords in a way that feels very familiar to those of us used to Google Search.

Right now, ecommerce brands are the best poised to capitalise. They are moving quicker, testing more aggressively, and seeing the clearest returns from early adoption. Retail and beauty, in particular, have found strong footing as high engagement categories in the social search space. But this is not just their play to win. This is a trend reshaping the broader media landscape. This is not a niche Gen Z trend that marketers can afford to wait and see on.

It is already reshaping behaviour beyond that generation. The search battleground has expanded, and brands that want to stay relevant need to get comfortable showing up in places they may not have considered before.

discovery diversification

The search landscape is no longer confined to one engine or one behaviour. Where once a single query box dominated the way people found information online, today's consumers are turning to a growing mix of platforms based on what they're looking for, and where they are in their journey.

Social media is increasingly becoming the go-to for discovery, not just for entertainment, but for news, shopping, and recommendations. For Gen Z in particular, social media has emerged as a preferred destination for a wide variety of search behaviours, from finding restaurants to researching health advice.

Mobile behaviours play a major role. One in three people (33%) now access the internet exclusively through their phones, naturally leaning into apps and social-first environments that are more visual and conversational.

Even in traditional brand search, long considered the stronghold of search engines, behaviour is splintering. While 84% of Australians still turn to search engines for brand name searches, this drops to just 64% for Gen Z, compared to 94% for Baby Boomers.⁵

Search is no longer a single moment or platform. It's becoming a layered, multi-channel behaviour that plays out across social feeds, video platforms, ecommerce marketplaces, and yes, still search engines, but only as part of a broader discovery mix.

top social media brands australia april 2025

includes mail and video conferencing audiences

MEDIA AUDIENCE (Millions)

TOTAL INTERNET POPULATION (14+)

22.1

Facebook & Messenger 21.6

YouTube 21.0

Instagram 18.9

Reddit 17.5

Google 17.4

Microsoft 14.5

Whatsapp 13.9

TikTok 13.7

LinkedIn 11.2

X 8.7

Pinterest 8.3

Snapchat 7.0

Source:
Ipsos Iris Audience Measurement Service April 2025
Population (14+) PC/Laptop, Smartphone, Tablet

industries leading the social search surge

Certain industries are embracing the new era of social search to evolve with the behaviour change of consumers. Retail and ecommerce increasingly rely on TikTok, Instagram, Pinterest, and Reddit for product discovery, reviews, and recommendations. Pinterest, with its visual and curated boards, helps users explore emerging trends and make purchasing decisions, while Reddit fosters discussions on product quality, comparisons, and consumer experiences.

Beauty and fashion see high engagement across social platforms, where users seek styling tips, trends, and influencer endorsements. Pinterest plays a key role in inspiration-driven searches, while Reddit communities provide in-depth product analysis and user feedback.

In food and hospitality, restaurants and cafes benefit from user-generated content and local recommendations on Instagram and TikTok. Reddit's foodie communities offer reviews and suggestions.

Travel and tourism depend heavily on social search for destination inspiration, hotel reviews, and itinerary planning. Pinterest provides visual guides, while Reddit's travel communities offer practical advice, visa information, and first-hand recommendations.

Finally, entertainment and media searches increasingly take place on social platforms. Gen Z and Millennials favour TikTok and Instagram for quick recommendations, while Reddit is a hub for deeper discussions, critiques, and industry news, shaping opinions on movies, music, and gaming.

authenticity driven by the creator economy

As social search continues to reshape consumer discovery, trust has become a defining factor in purchasing decisions. Consumers increasingly rely on peer-driven validation, reviews, and transparent recommendations over traditional advertising. The creator economy is pivotal in shaping consumer engagement and decision making.

With 46% of Australian social media users claiming to have made purchases based on creator promotions, authenticity plays a crucial role in shaping consumer confidence and nearly six in ten (59%) saying they trust creator-sponsored posts more than celebrity endorsements.⁶

Australia's creator economy is projected to reach AUD \$929 million in 2025 and surpass AUD \$1.25 billion by 2028, growing at 11% year-on-year.⁷

Trust in online recommendations does extend beyond creators. 85% of consumers say they are more likely to engage with brands that provide honest, unfiltered feedback rather than polished

Trust in online recommendations does extend beyond creators. 85% of consumers say they are more likely to engage with brands that provide honest, unfiltered feedback rather than polished marketing. Meanwhile, 96% of Australians consider data protection and transparency essential when engaging with brands online, with 52% ranking it as extremely important.

This growing emphasis on authenticity is reflected in consumer behaviour, with 60% of Australians discovering new brands through social media but 56% expressing hesitation about purchasing directly through these platforms. As social search accelerates, brands are increasingly investing in creators while leveraging organic social platforms for engagement to build credibility and trust.

closing the loop: *optimising social for shoppable search & creator impact*

A lot of focus on social search is around discovery and deeper brand/product consideration. To close the loop, particularly for ecommerce brands, the next frontier is likely a blend of shoppable search and influencer catalogues. In the last 12 months or so, the growing and established social platforms have launched search products as paid touchpoints for advertisers.

The next significant development for social search is how catalog and feed capabilities can be introduced into the platform search experience. With the shift in user discovery to social platforms, this could have implications for how users shop online.

The challenge for social platforms is keeping users within their platform's environments. With the trend in social search behaviour, Google has reacted by including YouTube Shorts in search results.

In this particular example, by optimising short-form video content for both YouTube and Google Search, influencer marketers can enhance their presence in shoppable social search hybrid environments, enhancing discoverability and conversion.

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AI is top of mind across digital currently. If AI develops on its current trajectory, a question to pose might be if social search evolves in time to establish itself ahead of the AI boom. As highlighted above, social naturally lends itself to discoverability, so it will be interesting to see how these environments evolve together or against each other in the coming years. The feed capability will need to evolve rapidly to gain a foothold ahead of AI shopping assistants if user behaviour begins to shift.

As social environments become the place to discover, will AI marketplaces quickly replace them as the platforms to shop from?

industries leading the social search surge

Social search is redefining how people discover and engage with brands, with platforms like TikTok, Instagram, and Reddit driving trust-based, dynamic interactions. Industries like retail, beauty, and travel are already capitalising on this shift, leveraging creator content and authenticity to shape consumer decisions. As platforms refine shoppable search and AI-driven discovery accelerates, brands must adapt quickly meeting users where they search today while anticipating where they'll search tomorrow.

We have uncovered **5 Implications** of this new era and actions for agencies and clients to discuss and incorporate in their strategies moving forward.

1. Traditional search is changing for certain audiences with social platforms becoming the primary discovery tool

Action: Optimise content for social-first search, ensuring visibility on platforms where consumers actively discover brands. Brands should optimise their social media profiles and content using relevant keywords to improve discoverability on social search.

Priority High: Without adaptation, brands risk losing relevance among younger audiences.

2. Consumers expect authenticity and trust from brands before making purchasing decisions.

Action: Invest in transparent communication, real-user reviews, and community engagement to build credibility

Priority High: Trust is a key factor in conversion and long-term brand loyalty.

3. Certain industries (retail, beauty, travel, entertainment) are heavily influenced by social search.

> **Action:** Leverage influencer partnerships, user generated content, and platform-specific discovery tools to drive engagement.

> **Priority Medium to High:** Brands in these industries must act now to stay

4. Social search is evolving toward shoppable experiences, making direct conversions more seamless.

> **Action:** Align content with platform commerce features, optimising for discovery to purchase journeys.

> **Priority High:** E-commerce brands must adapt to retain customers and drive sales.

5. AI-powered search could disrupt how consumers discover and shop for products.

> **Action:** Monitor AI advancements in shopping recommendations and ensure brand presence remains strong across both social and AI-driven search.

> **Priority:** Medium – AI adoption is growing, but social search remains dominant in inspiration and discovery.

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