

# The Daily: Searching for things on social media and whether chatbots will be our personal explorers

Audio

On today's episode, we discuss how much people are searching for things on social media, where they're looking, and how advertisers should approach social search. Tune in to the

discussion with our analysts Jasmine Enberg and Debra Aho Williamson.

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## Episode Transcript:

Marcus Johnson:

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Debra Aho Williamson:

Right now, the search ads on social platforms are pretty undeveloped. Basically, if you're social advertiser buying, say, video ads or other types of advertising on a platform and you want to ad search, you have to do that together. You can't kind of do it separately, so that makes the measurement a bit more challenging.

Marcus Johnson:

Hey gang, welcome to the Behind The Numbers Daily, an e-Marketer podcast made possible by various marketing solutions. I'm Marcus. Today I'm joined by two of our principal analysts who cover everything social for us, both based on the West Coast. One is in Washington State. Her name is Deborah Aho Williamson.

Debra Aho Williamson:

Hey Marcus.

Marcus Johnson:

Hello there. The other is based in California and we call her Jasmine Enberg.

Jasmine Enberg:

Hey, Marcus. Hey everyone.

Marcus Johnson:

Hello. Hello. And both have Finnish roots, heritage ties.

Jasmine Enberg:

Correct.

Marcus Johnson:

Affiliation, family, friends.

Debra Aho Williamson:

That is correct.

Marcus Johnson:

All of the above. And so today's fact is of course related to Finland. So a couple of facts all around Finland and politics. So Finland was the first European country to allow women to vote and stand for election in 1906. First European country. Nod to New Zealand, they were the first country ever to let women vote. In 1893, Finnish women became the first elected female members of a national parliament in the world, Finnish women in the world. In 1907, women make up 46% of the Finnish national parliament placing them in the top 15 countries in the world in terms of share of women in selected national parliaments. And in 2019, Finland's Sanna Marin created history by becoming the youngest head of government in the world at the age of 34. Finland, you're doing great. Thanks.

Jasmine Enberg:

Don't forget our female president, our former female president, Tarja Halonen

Marcus Johnson:

Oh, hello. Just, yeah, remarkable, remarkable stuff from Finland. Anyway, today's real topic, searching for things on social. In today's episode in the lead will cover social search, and other news today. So let's crack on with it. Debbie, social search, what does it mean?

Debra Aho Williamson:

Yeah, so it's basically what it sounds like. Imagine or you are on a social platform, say TikTok, Instagram, Facebook, Pinterest, et cetera, et cetera. And you are using the search bar to look for something. It could be a hashtag, it could be a person, it could be a place, a restaurant. You're using that to try to find something within that social platform. That's essentially what social search is.

Marcus Johnson:

Okay, and so how many folks are searching for things on social media?

Debra Aho Williamson:



Well, quite a lot. We don't have a specific number, but we can go back to something that a Google executive said just a year ago, actually at this time, they found that about 40% of young people, this is a very famous quote by the way, they found that 40% of young people, when they're looking for a place for lunch, they don't go to Google Maps or search, they go to TikTok or Instagram. So that's one important data point that Google caught note of, and I think has really opened up people's eyes to what's going on on the social platforms when it comes to search.

Marcus Johnson:

And there's some Jungle Scout data as well. 2023, where do US adults start their online product searches? And for Gen Zs and they break out Gen Zs and US population as a whole. And for both, it's Amazon first for about 57%, but when you split up the US population versus Gen Zs, and you look at second, third, fourth, et cetera, the US population, second place is search engines 42%, then it's walmart.com. In third place, 37%, then it's YouTube 25. So the difference there then for Gen Zs, if you look at second, third, fourth, et cetera, after Amazon, it's walmart.com, TikTok and YouTube all in joint second with 43%, walmart.com, TikTok and YouTube all in joint Second in terms of where they search for things or start their searches for things online. Search engines is behind all of those in fifth.

And Debbie, you pointed out as well, traditional search engines are losing share from 2019 to 2022. The share of US adults 1864 who use search engines, think Google, to research potential buys fell from 69% to 54 according to statist of consumer insights. Over the same time, the share who used social media grew from 20 to 24. So the gap between the two, between search engines and social media platforms, the gap was 50 points and now it's 30 points in just three years. In your report, Debbie, you make the point that people can use search bars for all kinds of things, and that social search is used for more than just shopping with many, turning to social media for other types of searches. What other kind of searches are we looking at here?

Debra Aho Williamson:

So definitely, obviously people is something that is a very common search on social media, but in addition, people are using social media to search for things to do or things to learn. There's a lot of searching going on for tutorials and how-tos or a makeup technique or something like that. And then people to follow, people to get to know celebrities, things like that. So it's not necessarily the nitty gritty information that I need now that you might see on a search engine.

It's definitely more in line with searching for things to improve something or to make something about your life easier. And oftentimes people are also looking for information that is from another person. So it's not necessarily a publication or something that they don't know or just some bland website. They're actually looking for some other person's opinions or feelings about the topic that they're looking for.

Marcus Johnson:

Jasmine, which social platforms are people searching on the most? Do you have a sense of that?

Jasmine Enberg:

Yeah, and I think we've mentioned the top three already, and they're TikTok, YouTube, and Instagram. And I mean, it makes sense. So all three of those platforms are visual platforms. So the search results come in the form of videos or videos and images in the case of Instagram. And one of the reasons that we found that people, especially young people, turn to social platforms over search engines is that the results are more visual, they're more engaging and they're more interactive than a list of links that you might get on a search engine. And I'm a really good example of this. I know Debbie and I have talked about this all the time, but thinking about my own search behavior, say I'm looking up a restaurant, I will always go to Instagram first, because I can see photos of the food. I can kind of gauge the vibe at the restaurant from content that other people have posted or the restaurant has posted, and also be able to get things like opening hours and location all in the same place.

Marcus Johnson:

So yeah, we mentioned where Americans start their search when shopping for things online. Amazon 57%, that's down four points from last year. Search engines, 42%, that's down seven points. Walmart is up seven points actually to 39. So that's closing in on search engines. So it goes Amazon, search engines, Walmart, and then you start to get to the social platforms. And YouTube is in fourth place overall behind Amazon, search engines, and Walmart, but it is the number one social platform for searching for things. Then it's Facebook, Instagram, TikTok, all the ones Jasmine mentioned, and then Pinterest, YouTube, 23% of people searching there. Facebook 21, Instagram 18, TikTok 17. So they're all pretty close. Pinterest further behind in with 11% in terms of where people start their search. But all of those platforms, all the social

platforms have seen gains in terms of people saying that they start their search there in the last year.

And then there's also a really interesting chart from Isaiah asking folks whether they typically research products or services before making a big purchase. And those 18 to 29 year old young people, most start their search on TikTok or YouTube, nearly double the number that will ask friends and family. Whereas you look at the 30 to 44 year olds, they'll ask family and friends about as much as they'll search for things on YouTube, looking things on TikTok is further behind. And then as you go further and further up in age, you start to get people, especially the over 60-year olds who 57% say ask family and friends. 29% say YouTube, so that's pretty healthy share for over 60 year olds. Just 1% will go to TikTok. All these social platforms are being used to search for things. But Debbie, who's doing what when it comes to social search ads?

Debra Aho Williamson:

And that is a super interesting topic. That was the subject of the report that I recently published. It's called Social Searches Taking Off. And not only is it a growing consumer behavior, but the platforms have started to try to monetize this search behavior in a more concrete way than in the past. So just to set a stage though, advertising and search isn't new on social platforms. We've seen platforms like Pinterest and Facebook doing it for several years now. Pinterest has had search ads available since 2014, so almost 10 years, believe it or not.

Marcus Johnson:

Wow. Yeah.

Debra Aho Williamson:

Facebook has had search ads in the search results page or at Marketplace, which is its shopping section since 2019. But neither of those have really kind of caught fire, or caught advertiser's attention in the way that I think some of these new types of search advertising will. So now what we're seeing is Instagram and Snapchat moving really quickly. Instagram started a test of search results ads in March, it rolled it out globally in May just two months later.



Snapchat is moving into generative AI by testing sponsored links and it's chats with the My AI chat bot. TikTok gets a ton of attention because it's been testing search ads for a full year. Hasn't fully launched them yet, but there's a lot of focus on TikTok, people searching for things on TikTok and the ad potential there. And even Reddit. Reddit is launching ads, the ability for advertisers to select specific keywords to associate with their brand. So a lot of activity going. Very nascent, not necessarily something that's going to be huge in terms of dollars right this year, but certainly more interesting and more momentum around social search advertising than there's been in a really long time.

Marcus Johnson:

So Jasmine, will social search head in the same direction as general search with regards to chat bots? We've seen chat GPT kind of kick off this wave of companies investing in artificial intelligence and suggesting that people are going to talk to chat bots and that's how they're going to search for things in the future, through traditional search channels. Things like Google, things like Bing. Are we also expecting social search to go in a similar direction?

Jasmine Enberg:

Well, it's really early days for generative AI chat bots on social media. Snap, of course, was the first to market with My AI, but TikTok is also testing a chat bot called Taco in the Philippines. And Meta has said that it's exploring chat bots. I think they're calling them AI agents on Instagram, on Messenger, and on WhatsApp as well. So there's certainly a lot of momentum around it. Right now I'd say there this shiny new toy for social users, but they can also provide real value for advertisers as well.

And when Snap first announced My AI, I wrote about how the company had to be thinking about ways that it could use the first party data it was collecting from My AI on user interests and behaviors to be able to improve ad relevancy and targeting across the app. And it's doing just that right now. It's already starting to serve more relevant content to users across the Snapchat app, including in Stories and Spotlight, both of which now host ads. So there's the advertising potential there-

Marcus Johnson:

Right.

Jasmine Enberg:

... Outside of the search ads that they've also started testing. There's obviously a ton of privacy and security concerns, and these chat bots have a lot to prove as an ad venue in particular, but I think it's something that advertisers need to pay attention to, especially if and when Tick Tok launches Taco in the US.

Marcus Johnson:

Yeah. Let's stick with advertisers to close out the lead. Debbie, you mentioned that you have written full reports on this, on social search. And towards the end you talk about advertisers and how they should approach social search. What are a couple of nuggets that you'd like to share with the listeners today?

Debra Aho Williamson:

Like I mentioned earlier, this is still pretty nascent. It's exciting to see the changes in search behavior, especially among Gen Z, but the advertising business is very, very young on all of these platforms. So my first piece of advice would be, I mean, advertisers should definitely not abandon Google or Amazon by any means. There's still so much search activity happening, and we even saw that in the data that you referenced earlier, where the gap is narrowing between search engines and social platforms when it comes to search behaviors, but people are still using search engines, and we're even seeing Google launch things like Perspectives to try to capitalize on this search behavior. So Perspectives, just to give a quick example is if you search for something where there's a lot of opinion, personal opinion about it, you might see a separate type of search result that includes short and long form videos or images or text that comes from a person as opposed to maybe a website or a publisher.

So Google is doing some of the same things that the social platforms are as well. So, again, don't abandon Google or Amazon. But at the same time, if you are a marketer working with social media, which is basically every marketer today, it's really going to be important, more important than ever to make your organic content searchable. So even if you're not selling advertising or placing advertising on these platforms, you want your content to turn up. People are searching for a makeup tutorial or a place to eat, to use Jasmine's example of Instagram. I mean, you want your content to turn up in that search. Then if you're testing social search ads, again, please, you need to be flexible and set realistic expectations. Right now, the search ads on social platforms are pretty undeveloped. The measurement tools are pretty basic.

There's really little to no ability to bid on keywords, which is kind of a basic function of search advertising. And there's right now on most platforms, no way to buy search ads separately from other ads. So basically, if you're a social advertiser buying, say, video ads or other types of advertising on the platform and you want to ad search, you have to do that together. You can't kind of do it separately. So that makes the measurement a bit more challenging. Last thing I would say is to look beyond the TikTok hype. I mean, I mentioned a bunch of platforms that are offering advertising and TikTok is just one of them. You've got a lot of attention focused on TikTok for very good reasons, but when it comes to search, I think spreading around and testing what you can do with all the platforms is what makes sense.

Marcus Johnson:

Yeah. That one really jumped out to me. I thought the section was brilliant, but that one in particular, so much talk about TikTok and how people should focus on TikTok and you're saying yes, but don't get carried away, you know Instagram and Facebook have more users who follow brands. And you also make some really great points about the benefits of using Pinterest and Snapchat as well.

But yeah, what you were saying about thinking of social searches as a discovery engine, making it easy for young people, for Gen Zs to find things to buy. That point in your report, nearly six in 10 college aged folks, 18 to 24 year olds, six in 10 will be social buyers this year, making at least one purchase via social channel according to our forecast crew. And then your point on introducing a brand via authentic, helpful content brings us full circle for what you were saying at the beginning. People are looking for things on social in terms of how-tos, tutorials, and that can really help consumers learn about new brands. That's it for the lead time, of course, for the post-game report. Debbie, I'll start with you. A quick 20 seconds mention from something that's worth repeating from today's show.

Debra Aho Williamson:

Search behavior is growing on social platforms, especially among Gen Z, and the advertising opportunities are growing as well. So it's still very new for advertisers, but definitely something that they should experiment with and add to their social media advertising.

Marcus Johnson:

And Jasmine?

Jasmine Enberg:

So we didn't use this word exactly, but Debbie talked about it when she was talking about social platforms surfacing content from other users. But the word I would have people keep in mind here is crowdsource, right? And I think that's so vital to the idea of social search, and one of the reasons that people turn to social platforms is because they really want to see content from other users. And what I'm really paying attention to beyond what's happening on social media is the impact that that's going to have on traditional search as well.

Marcus Johnson:

Well, Debbie's full report is called *Social Search is Taking Off: How Advertisers Can Benefit as TikTok, Instagram and Snapchat Take on Google*. You can click the link in the show notes or you can head to [insiderintelligence.com](https://insiderintelligence.com) to read the entire thing. That's all we've got time for today. Thank you so much to my guests. Thank you to Debbie.

Jasmine Enberg:

Thank you, Marcus.

Marcus Johnson:

Thank you, of course, to Jasmine.

Jasmine Enberg:

Thank you, Marcus. Thank you everyone.

Marcus Johnson:

Thank you to Finland for letting come live there. Thank you to Victoria who edits the show, James, who copy edits it. Stuart who runs the team, and thanks to everyone for listening in. That's it for the Behind Numbers Daily and eMarketer podcast made possible by various marketing solutions. You can hang out with Sarah Levo tomorrow for the Re-Imagining Retail Show, and I will see you again hopefully on Thursday.