

Search advertising claims nearly a quarter (22%) of media budgets and expands reach to social and video platforms

- Nearly half (48%) of Gen Z search more frequently on social and video platforms than in the last three years
- 72% of weekly US internet searchers, search at least once a day
- Search users are 1.2x more likely to agree they believe a claim when it comes from a creator vs. from the brand itself
- Search on social and video platforms has a full-funnel impact: marketers should follow a Mix-Align-Prime (MAP) framework

New WARC and TikTok research: The search before the search - how social and video have changed the way we seek, find and buy

30 July 2025 – The search landscape is evolving beyond traditional search engines to social and video platforms, and is outpacing AI search. According to [WARC Media](#), search advertising now accounts for nearly a quarter (22%) of all media budgets, and forecasts global search advertising spend to reach \$248.6bn this year, rising to \$265.5bn in 2026.

To better understand this shift, [WARC](#) in partnership with [TikTok](#) carried out new research together with behavioural scientist [Richard Shotton](#), to offer marketers insights into how search is evolving, and what this means for the future of marketing.

Alexis Wolf, Head of Advisory, Americas, WARC, said: *“Search is no longer a destination for finding an answer. It’s a doorway that starts a digital journey. From text to image to video to AI, the tools are evolving, and with them, audiences have increasingly dynamic expectations of what search can do. By rethinking what search is, we unlock new ways of connecting with consumers - earlier, deeper, and more meaningfully.”*

Sissi Xu, Product Lead, Search & Discovery, TikTok, commented: *“Today, people search for more than answers. They search for perspectives. This research tells us that people drift from inspiration to research to purchase, whilst gathering perspectives along the way. Users scan a chorus of creators, friends, experts, and brands before deciding what resonates. Meet them there. Design for curiosity. Share something worth finding. Treat every search as a chance to connect. Look beyond views and give people a point of view.”*

Richard Shotton, behavioral scientist and author, says: *“We often assume that search behavior is driven by logic. But behavioral science tells a more interesting (and frankly, more realistic) story. Behavioral science helps us understand this reality. It doesn’t just explain what people do—it reveals why they do it. And in a world obsessed with what’s changing, it gives us an unfair advantage: insight into what isn’t.”*

The research, based on a quantitative survey of consumers in the US fielded during March 2025, together with a series of behavioural science experiments and qualitative interviews with marketers, identified three key opportunities for marketers in this new era of search:

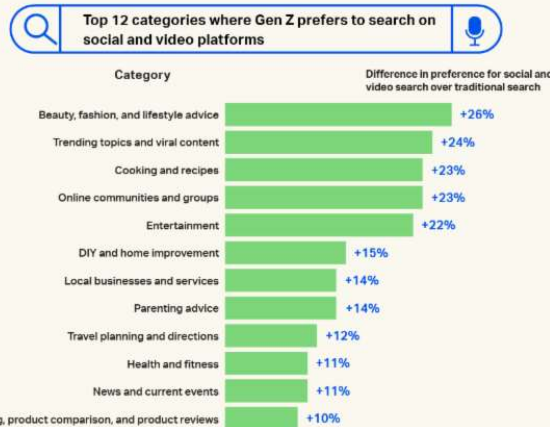
Search habits are diversifying: Nearly half (48%) of Gen Z search more frequently on social and video platforms than in the last three years

Search is one of the most common and enduring digital activities there is. Among weekly US search users, 72% do so at least once a day, according to the survey. But search is changing fast and there are more ways for users to search than traditional search engines.

US weekly searchers search twice (30%) more frequently on social and video platforms than on AI platforms (14%). The shift is even more pronounced among Gen Z consumers: nearly half (48%) are searching more frequently on social and video platforms in the last three years, compared to 19% that use AI-assisted search.

Social and video platforms offer an appealing cultural and community-driven layer to search across nearly every category, led by beauty, fashion, and lifestyle, which traditional platforms lack.

The search before the search: How social and video have changed the way we seek, find, and buy



Source: TikTok Marketing Science Global Future of Search Study 2025 (US Results), conducted by WARC

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The survey also found that 86% of Gen Z internet users said they search on TikTok weekly, making them nearly as likely to search there as on the leading traditional search engine (90%) and ahead of online marketplaces (75%) or the leading AI platform (60%).

Among people who use TikTok to search, 38% start on traditional search platforms before coming to the app to search, and 34% start on TikTok before moving to traditional search platforms.

Search is as much about discovery and curiosity as it is about information: Over one-third (35%) of TikTok users are inspired to search based on content they see on the platform

Evolving content has also shaped new behavior. Gen Z and Millennial searchers are significantly more likely to choose a search platform because it offers better in-app discovery of content, products, or services, and they are more likely to be influenced by recommendations from creators and influencers. Whilst Gen X and Boomer searchers prioritize platforms that deliver more relevant answers, faster results, and more trustworthy or verified information.

The search before the search: How social and video have changed the way we seek, find, and buy

		Linear Efficient Specific need	Dynamic Exploratory Diverse needs
Top 5 motivations to search			
Rank		Gen X / Boomers	Gen Z / Millennials
1		To find specific information	To explore my personal interests
2		To solve a problem or find a solution	To entertain myself
3		To compare product specifications, prices, and ratings	To learn or educate myself
4		To explore my personal interests	To solve a problem or find a solution
5		To learn or educate myself	To find specific information

Source: TikTok Marketing Science Global Future of Search Study 2025 (US Results), conducted by WARC

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Creators who come across as relatable and “like me” can be believable and impactful. The research showed that search users are 1.2x more likely to agree they believe a claim when it comes from a creator vs. from the brand itself.

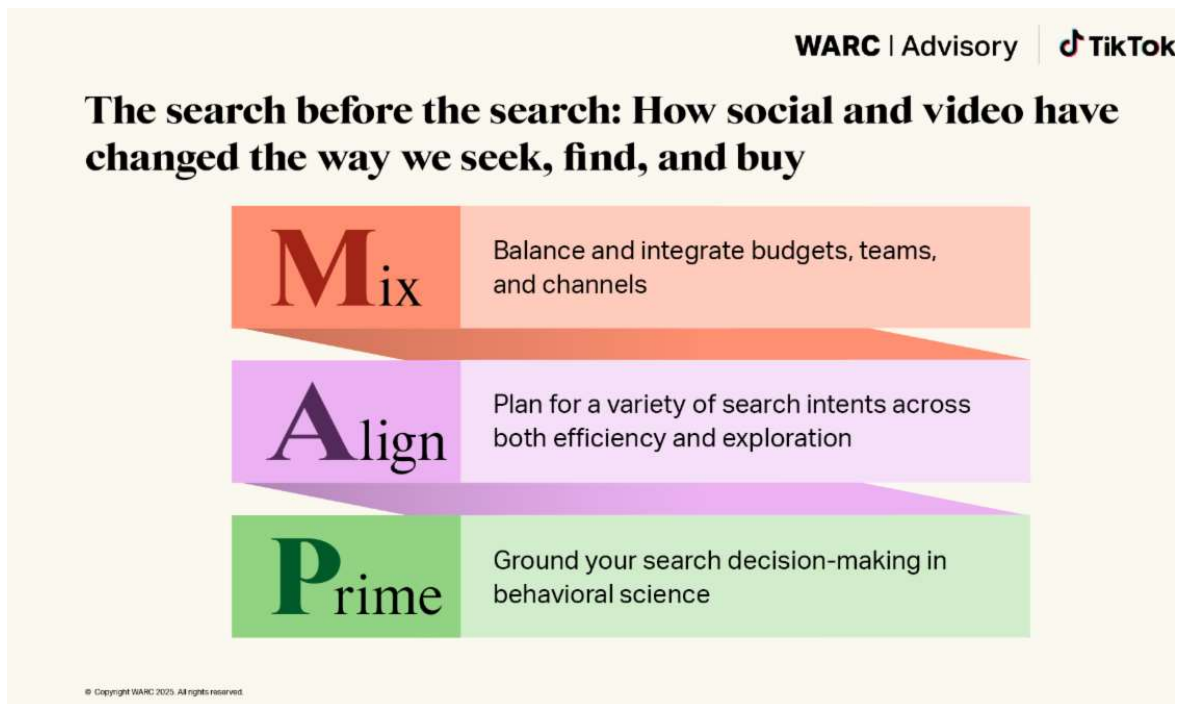
Searchers have seven types of intent: inspiration, experiential, relational, learning, research, solution, and purchase. On social and video platforms, searchers regularly search to satisfy all of these intent.

Just over one-third (35%) of TikTok users are inspired to search based on content they see on the platform, while [previous TikTok / WARC research](#) found that seven in ten social and video platform users have bought a product or brand they had never purchased before after seeing content on TikTok.

Marketers should follow a Mix-Align-Prime protocol: Introducing the MAP framework

While traditional search is typically valued for its performance focus and lower-funnel impact, search on social and video platforms has a full-funnel impact, as it can catch people at earlier stages of discovery as well as inspiring action and purchase behavior.

To plan for intent-led search, brands are advised to follow the MAP framework:



Mix: The future of search is multi-platform. To align search strategies with diverse consumer search habits, marketers should balance traditional and emerging platforms, such as social and video, to optimize each channel's strengths whilst creating demand.

Search is often siloed from other types of media, budgets and teams. For success, marketers and their agencies should build more agile and flexible search advertising strategies.

Align: Searchers often have more than one intent when they search on social and video platforms - from research, to learning or inspiration. And search intentions can vary depending on the product category.

When planning for search on social and video platforms, marketers should lead with inspiration, relational, and experiential intents; layer on research, learning, and solutions; and prime for purchase.

Prime: platforms that provide quick access to search functions (such as intentional search in the search bar or suggested searches on video pages) can inspire more consumers to start a search.

Exploratory search offers an opportunity for brands to be discovered before consumers' bias has set in. It is exceedingly hard to change people's opinions once they are set. To combat preconceptions about their brand, marketers should capitalize on discovery.

A complimentary copy of the full report is available to download [here](#).