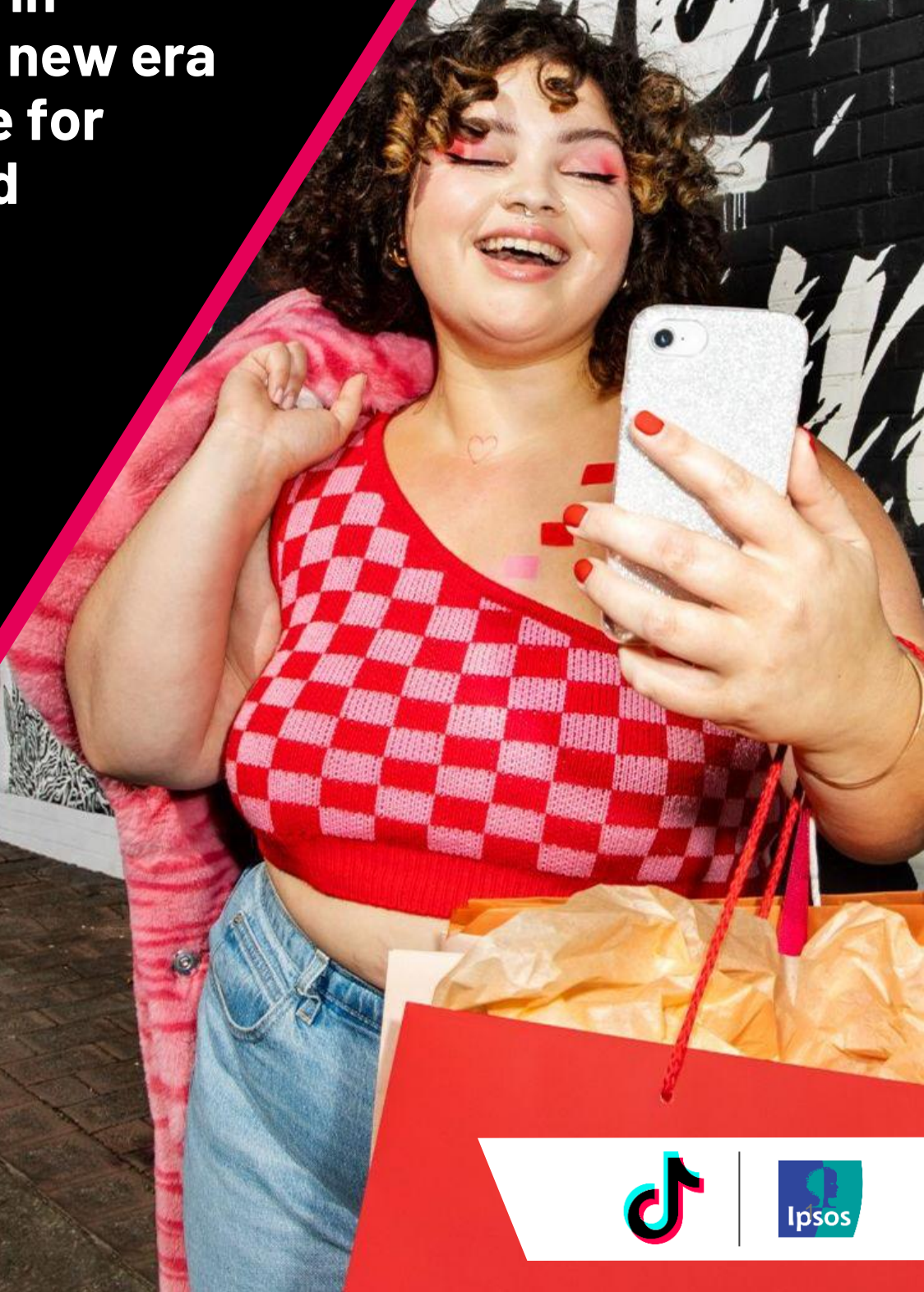


# COMMERCE REDEFINED

TikTok's role in  
ushering in a new era  
of commerce for  
shoppers and  
businesses





# Executive Summary



**Welcome to Ipsos' and TikTok's exploration of the new era of commerce.** This thought paper, a joint effort between the two entities, aims to contextualize the experience of shoppers and brands in the evolving commerce landscape. By understanding the role discovery, authenticity, and seamless shopping experiences play in a consumer's purchasing journey, we intend to arm marketers with the tools necessary to meet this unique moment.

**The moment before us.** Today's ever-evolving multi-media landscape comprises of a collapsed purchasing funnel and a dizzying number of avenues to shop from online, in-app, and IRL. With this in mind, it's no secret that consistently delivering on a full-funnel strategy comes with its fair share of challenges. To succeed in the evolving commerce landscape, both small businesses and legacy brands alike must re-evaluate their tactics to meet the moment.

**'Commerce Redefined'** explores what's powered TikTok's transformative role in reshaping the shopping experience, extending beyond traditional media or e-commerce alone to drive commerce online, offline, and everywhere in between. Our research asserts that discovery and authenticity are two key drivers in this transformation, helping brands harness new models of commerce for new kinds of organic behavior. This paper delves into the personalized content experience that TikTok offers to both shoppers and to brands—and is packed with actionable insights to help guide your marketing strategies.

# Executive Summary

## 1 The rise of discovery driven commerce

TikTok's discovery engine uniquely blends joyful, user-generated content with active search capabilities, allowing brands to reach new and existing audiences in creative ways.

## 2 The authenticity factor: building beyond the transaction

TikTok revolutionizes commerce by fostering trust with authentic, community-driven content, enabling brands to connect with audiences. This trust boosts purchasing decisions as TikTok transforms everyday products into fixtures of culture through user creativity.

## 3 Strategies for the new era of commerce

TikTok transforms the shopping experience from a mere transaction into an engaging and authentic journey. Its combination of captivating content, impactful ad solutions, and seamless transaction integrations positions it as a key player in the evolving e-commerce landscape.

# Methodology

Quantitative Research as follows:



**US, Total n=3,876**



**GenPop ages 18-65**



**20-minute, online device agnostic survey**



**Surveyed  
August - September 2024**

This research, commissioned by TikTok in collaboration with Ipsos, surveyed 3,876 US individuals aged 18-65, including 825 TikTok shoppers. Conducted from August 19, 2024 to September 16, 2024, the 20-minute online survey required participants to use at least one social, video, and e-commerce site monthly. 'Shoppers on TikTok' had used TikTok in their shopping journey within the last three months.

To enrich these insights, Ipsos also conducted 45-minute interviews with 8 marketing professionals from various sectors, including CPG, beauty, electronics, and more.

For full details on the quantitative and qualitative methodologies, please refer to page 26.



# Foreword: the Ipsos Perspective



“ TikTok is more than just an entertainment platform; **it's reshaping the commerce landscape, turning everyday scrolling into a gateway to exploration and transaction.**

- Jessica Phan, SVP & Senior Client Officer @ Ipsos

Ipsos, in collaboration with TikTok, **explored the new era of commerce to shed light on how platforms like TikTok are fundamentally altering the way consumers interact with brands and make purchasing decisions.** This thought paper offers insights for **businesses adapting to the evolving landscape of marketing, e-commerce, and digital**, enabling brands small and large to capitalize on new growth opportunities.

Through our extensive work with clients across various industries, Ipsos has witnessed firsthand the diverse approaches brands take when navigating the commerce landscape.

In partnership with TikTok, **we delved into the rise of authentic, user-generated content and the immense potential it holds for brands to connect with consumers in meaningful ways.**

Entertainment and discovery are now crucial components of a person's shopping experience. Businesses that choose to meet this unique moment can capitalize on the opportunity to drive both engagement and sales. Understanding the impact of these efforts will become increasingly critical in the years to come.

Charting a course through this fast-paced landscape is a formidable undertaking, but one that is most effectively accomplished through partnership – across brands, research organizations such as Ipsos, and platforms like TikTok. **By collaborating to develop data-informed strategies, we can uncover new pathways to growth and achievement in the digital economy.**

This thought paper represents a substantial leap forward in our shared understanding of what's powering today's commerce ecosystem and its impact on brands. **We hope that these insights and recommendations will inspire businesses to seize the opportunities presented by a platform like TikTok to create deeper relationships with their customers and drive sales.**

Together, we can strategically leverage insights, innovation, and creativity to drive meaningful, measurable results in the commerce sector.





**PART 1:**

**THE RISE OF DISCOVERY**

**DRIVEN COMMERCE**

# Through content and commerce, TikTok has transformed the way people discover



## 3-in-4

Shoppers on TikTok agree that **TikTok is the go-to place to discover new brands and products**<sup>1</sup>

On TikTok, discovery is the platform's superpower. Fueled by the For You feed, users often make spontaneous discoveries while also leveraging the platform's search capabilities to actively seek out new content and products.

Whether stumbling upon something you didn't know you needed or searching intentionally, discovery on TikTok creates a unique opportunity for merchants and brands to reach new engaged audiences and connect authentically with existing customers.



“ The big change has been a move away from traditional search engines as a point of discovery to something more engaging, like TikTok. TikTok becomes the point of discovery.

- VP of e-commerce, Fashion

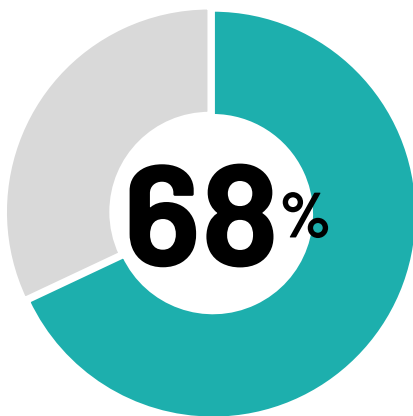


# Understanding TikTok's Discovery Engine: Joyful Discovery

On TikTok, users can discover new brands and products they might not have encountered otherwise.

Unlike other platforms that rely on a social graph, TikTok leverages an interest graph to connect with both people and brands. This approach curates content for users to discover based on their individual interests and interactions on the platform, rather than their social connections. By doing so, TikTok has successfully introduced and popularized niche and unique topics, fostering a sense of digital intimacy at scale by catering to a person's specific interests on the platform.

For brands, this means reaching audiences that extend beyond their core persona or target market, opening doors to previously untapped demographics to drive sales.



agree that **TikTok is unique because of the personalized content on the For You feed that allows for greater product discovery<sup>1</sup>**





# Understanding TikTok's Discovery Engine: Intent-Based Search

TikTok users are not just making spontaneous discoveries— they're also actively turning to the platform to initiate a search. By leveraging TikTok's search and shop tab functionality, users can discover more authentic, relevant results that help them learn and give them the confidence to buy.

Whether someone is searching on TikTok to see a product brought to life through a tutorial or turning to the comments section for community feedback on a brand, TikTok has earned its stripes as a destination for users to search with intention.

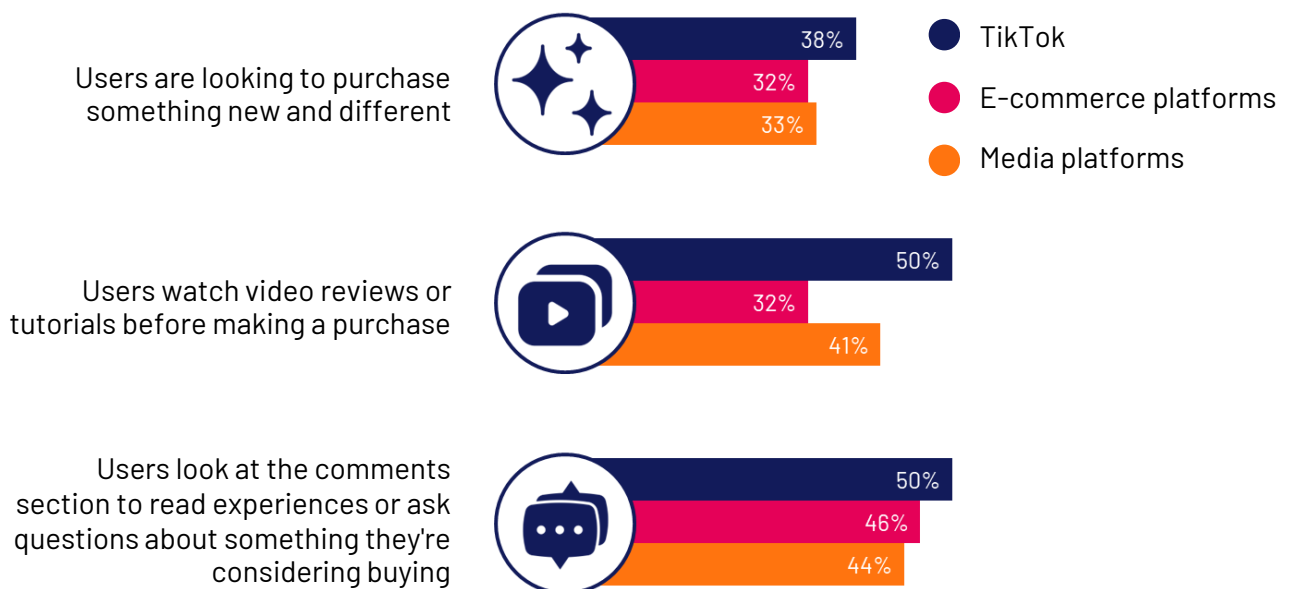
**2 in 3**  
Discoveries on TikTok are intentional<sup>2</sup>

## Search behaviors have evolved

- Although traditional search engines still play a significant role, more than half of people surveyed now prefer using video and social media platforms for product research.<sup>2</sup>
- Almost 3 in 5 users leverage TikTok's search functionality and nearly 1 in 4 search for something within 30 seconds of opening the app.<sup>3</sup>

What's more, TikTok shoppers frequently return to the platform following their purchase. Research into shopping behaviors in the home decor vertical specifically revealed that 2 in 5 TikTok users say they return to the platform to leave feedback for the brand/product, and over a third of TikTok users return to see how others are using the product.<sup>4</sup>

## When it comes to metrics of purchase consideration, TikTok is outpacing competitors across core media and e-commerce platforms.<sup>1</sup>



(1) TikTok Marketing Science US, Commerce Landscape Study 2024, commissioned by TikTok in collaboration with Ipsos

(2) TikTok Marketing Science Global TikTok as a Discovery Engine Study 2023, conducted by Material

(3) TikTok Internal Data, US, as of June 2024

(4) TikTok Marketing Science US Refreshed Path to Purchase Survey via AYTM, October 2024. [Q23] (n=600)



Nearly **1-in-2** shoppers on TikTok **discover or hear about a new brand on TikTok** because of seeing ads or shoppable content<sup>1</sup> which is significantly higher than other e-commerce and media platforms

**For brands, this means an opportunity to continuously engage with your existing customer base while growing demand across new audiences.**

Whether each unique discovery on TikTok begins through an intentional search or a joyful, spontaneous discovery, the result remains consistent: shoppers are introduced to new products, brands, and ideas on the platform. This unique blend of discovery is TikTok's superpower, setting it apart from other platforms and positioning it as a leader in the e-commerce and media landscape.



With this in mind, it's no wonder the hashtag **#TikTokMadeMeBuyIt** overtook the commerce landscape as a user-created trend dating back to 2020.





# A Personalized Experience for Every Kind of Shopper

TikTok is a powerhouse when it comes to offering a personalized content experience for online shoppers.

**TikTok's For You feed curates a shopping adventure tailored to each user's interests, transforming scrolling into an opportunity for discovery.**

The For You feed acts as a digital concierge, dynamically adjusting to the preferences and behaviors of each user, ensuring that the content remains fresh, engaging, and relevant.



**73% of shoppers on TikTok agree that TikTok has personalized recommendations <sup>1</sup>**

This new wave of search and exploration provides great value for brands, as consumers are inspired and take action at the point of discovery.

Users are more inclined to engage with content that resonates with their individual tastes and preferences, or more often than not, expands them by introducing new products and brands.

## **TikTok is an effective discovery engine**

**68%**

of Shoppers on TikTok agree that TikTok makes it easy to find more of their favorite brands, products, or services<sup>1</sup>

*which is significantly higher than other media platforms*

This ability to facilitate discovery is not only intrinsic to TikTok's For You feed, but it is also a testament to its community-driven approach, where users become both the audience and the ambassadors, sharing and recommending their finds with a sense of excitement and authenticity.

Although TikTok Shop only launched in September 2023, **our research indicates that users perceive it to deliver personalized recommendations on par with e-commerce platforms in the US.<sup>1</sup>**



**PART 2:**

**THE AUTHENTICITY**

**FACTOR: BUILDING BEYOND**

**THE TRANSACTION**



# Genuine connections and vibrant communities inspire brand love and deliver purchase validation

It's not surprising that creator-centered commerce is on the rise, not just on TikTok, but across many e-commerce platforms. **Anyone from small business owners to legacy brands, or one of the over 170M active users in the US can create on TikTok simply by picking up their phone.**<sup>4</sup>

“**Our CEO and our CMO spend their Sundays in all comments across all platforms [...]**  
**They are not afraid to go on a TikTok LIVE and have an active conversation.**<sup>5</sup>  
- Business of Fashion roundtable participant

Authenticity lies at the core of TikTok's appeal, elevating the shopping journey from transactional to experiential.

The platform is where **authenticity reigns, captivating users with real-life product usage and user-generated content.** In fact, 74% of social/video platform users say that TikTok's creator content feels authentic.<sup>1</sup>

Creator-driven authenticity bridges a trust gap between the user and a brand by fostering an environment where genuine reviews drive purchasing behavior.

Brands implicitly benefit from the trusted discourse that takes place on TikTok, with 55% of TikTok users saying they're more likely to trust brands after learning about them from TikTok creators.<sup>6</sup>

On TikTok, **brands can build strong, one-to-one relationships with their customer base**, whether it be through [LIVE Shopping](#), engaging in the comment section, or by partnering with trusted creators and affiliates.

**TikTok's ecosystem empowers any user to be a creator, sharing genuine, real-life experiences that create a halo effect of trust and reliability that other mediums often struggle to achieve.**

# 2 in 3

shoppers agree that TikTok makes them feel connected to the story behind the brands and product<sup>1</sup>

(1) TikTok Marketing Science US, Commerce Landscape Study 2024, commissioned by TikTok in collaboration with Ipsos

(5) Fashion Executives on Finding Brand Success on TikTok, September 18, 2024

(6) TikTok Marketing Science Global Creators Drive Commerce Study (US results) 2022 conducted by Material



TikTok’s authenticity factor pays off, inspiring users to not just watch, but to actively engage. In fact, 52% of shoppers on TikTok are more likely to engage with the content, outpacing e-commerce competitors by 18%.<sup>1</sup> **This emphasis on authenticity is echoed by businesses**, with an in-house e-commerce social media manager in the food and beverage sector highlighting, **“TikTok is more organic than other platforms. [...] There’s a level of trust and value that you get.”**

Compared to other e-commerce and media platforms, shoppers on TikTok are more likely to agree that **TikTok delivers on discovery and authenticity, leading to purchases.**<sup>1</sup>

DISCOVERY



**79%**

say TikTok offers **engaging video content** that highlights brands, products, and services

AUTHENTICITY



**81%**

say TikTok offers a **view into real-life product usage**

CHASE



**37%**

say the ads/content on TikTok **help them decide what to buy**





**“ We want to show up for our consumers in places they already are. We’re highly present on the app— working with creators, creating organic brand content, advertising, and most recently, on TikTok Shop.**

**– Aaron Jones, Liquid I.V.<sup>®</sup> VP of E-commerce & Media**

# How Authenticity Became Liquid I.V.'s<sup>®</sup> Competitive Advantage

Hear from Aaron Jones, Liquid I.V.<sup>®</sup> VP of E-commerce & Media on the strategies the functional beverage company used to build brand love and drive sales

## 1 Unlock a new sales channel with TikTok Shop, meeting customers where they are

"Liquid I.V.<sup>®</sup> has fully embraced TikTok Shop as a pivotal part of our e-commerce strategy, offering consumers a **seamless** and **direct experience** to **purchase products without having to leave the app**. In just a short time, TikTok Shop has managed to sit in **the intersection of culture, content, and conversion.**"

## 2 Share authentic experiences to drive discovery and demand

"An affiliate creator created an honest review that took off, resulting in a **sales lift across omnichannel** and a full **sell out of the flavor** with over 59K total orders on TikTok Shop. Of the Hydration Multiplier<sup>®</sup> Popsicle<sup>®</sup> Firecracker purchasers in May and June, **88% of the orders were new customers to Liquid I.V.<sup>®</sup>**, which proved to us the importance of TikTok Shop as a sales channel and how critical it is to be active on the platform to **drive discovery and demand.**"

## 3 Join the creator-led conversation

"The brands that **lean in** and **embrace dialogues** will succeed. Liquid I.V.<sup>®</sup> works with creators who resonate with our target audience, ensuring **authenticity** and **engagement**, while prioritizing organic content and honest reviews. **Brands that are unwilling to interact, work with, and trust creators will continue to struggle and fall short of reach and engagement compared to their competitors.**"

Want to understand trends and trend forces on TikTok? Learn more from [TikTok's What's Next Shopping Trend Report](#)





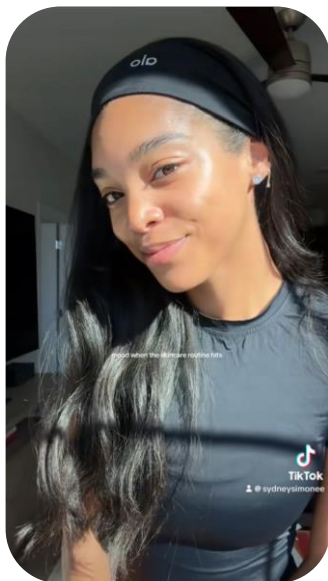
# Revitalizing the Everyday



TikTok is in the lead – that's where a lot of trends start and maybe filter down to other platforms. – VP of e-commerce, Fashion

Authenticity is a key driver of revitalizing everyday products on TikTok. **The platform has a knack for making the everyday extraordinary**, often repositioning legacy brands into cultural relevance.

For instance, petroleum jelly products experienced a cultural resurgence thanks to K-beauty skincare enthusiasts on TikTok who demonstrated the 'slugging' technique, showing how it delivers the coveted glass-like skin, inspiring millions to embrace the unconventional practice. Similarly, a simple vegetable was at the center of food and beverage internet culture through the 'sometimes you need to eat an entire cucumber' trend born on TikTok. Even tinned fish, often considered an unremarkable pantry item, found renewed cultural significance through TikTok.



# 82%

of Shoppers on TikTok agree that TikTok has trendy/trending brands, products, and services<sup>1</sup> significantly more-so than other e-commerce and media platforms.

This ability to transform utilitarian items into beloved sensations is fueled by the creativity of TikTok's user base and trusted creators who reimagine and present items in unique, innovative ways. As consumers increasingly seek inspiration and novel products, TikTok's authentic platform sets the stage to breathe new life into products across all verticals and cost brackets.

The platform's trendsetting influence is demonstrated through its ability to revitalize everyday products, making them not only desirable, but also culturally significant. TikTok is a place where every brand story can thrive—from everyday essentials to luxury purchases and surprise-and-delight discoveries. Here, you can launch a product, retell your brand story with fresh context, and co-create a new identity with users and creators on the platform.



**PART 3:**

**STRATEGIES FOR THE NEW**

**ERA OF COMMERCE**





“

The TikTok community built a commerce movement that started on the platform. But what happens on TikTok doesn't just stay there. The organic #TikTokMadeMeBuyIt behavior translates into sales everywhere brands sell: in-app, online, in-store, and everything in between. Building upon this momentum, we're developing native solutions to drive sales with the new era of commerce in mind.

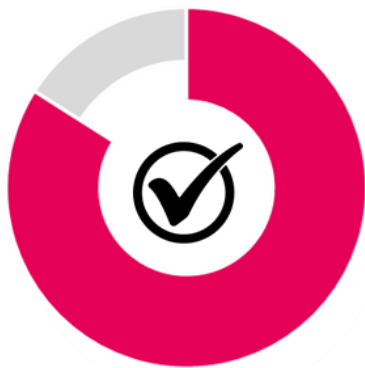
- Amy Oelkers, GM of Commerce, US Global Business Solutions at TikTok

# A Seamless Shopping Journey: On and Off the Platform

Discovery and authenticity are at the center of TikTok's ability to influence the shopping journey both on and off the platform. This lends itself to new kinds of shopping behaviors and alternative channels for brands to reach new and returning customers.

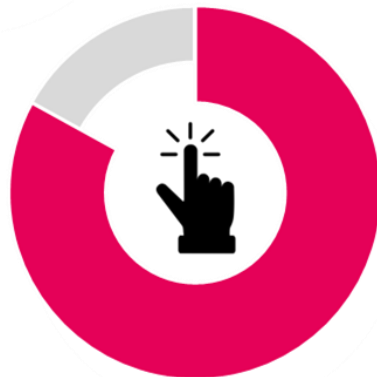
Inspired by this organic momentum, TikTok is investing in the new era of commerce. From TikTok's advertising solutions to e-commerce innovations, like TikTok Shop, the platform is creating a frictionless shopping experience for users to discover, browse, and buy.

Additionally, to deliver unparalleled convenience to both merchants and shoppers, TikTok has also formed strategic partnerships with [product partners specializing in e-commerce](#).



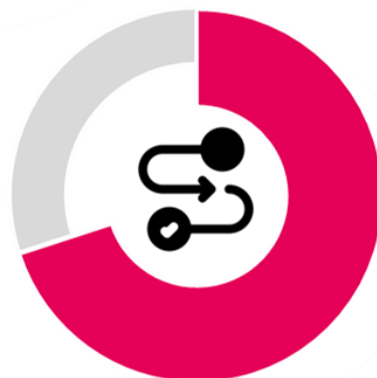
**84%**

of TikTok users agree that TikTok Shop is easy to use <sup>2</sup>  
*After viewing a TikTok Shop experience*



**83%**

of Shoppers on TikTok agree that **TikTok is convenient to use**<sup>1</sup>  
*At parity with other e-commerce platforms*



**68%**

of Shoppers on TikTok agree that **TikTok has a seamless shopping experience from discovery to purchase**<sup>1</sup>  
*Significantly more so than other media platforms*

(1) TikTok Marketing Science US, Commerce Landscape Study 2024, commissioned by TikTok in collaboration with Ipsos

(2) TikTok Marketing Science Global, (US Results) TikTok Shop Research 2023, conducted by Material



# Where authentic, community-driven content and personalized experiences converge



“

The reality is, [TikTok] is a feedback channel where [the community is] asking for you to participate.

- Business of Fashion roundtable participant <sup>5</sup>

In the rapidly evolving world of commerce, TikTok has emerged as a transformative force, reshaping the shopping experience for consumers and brands alike.

**The platform's influence extends beyond conventional media and e-commerce, creating unparalleled opportunities for brands to drive sales growth both on and off TikTok.** Unlike traditional e-commerce, TikTok offers an immersive and engaging journey that captivates users through authenticity, discovery, and seamless transactions. And unlike traditional media, TikTok now offers a way to harness the power of the community to integrate e-commerce capabilities directly into the platform with TikTok Shop.

Sales are a key driver for businesses on TikTok, but the platform offers much more than just a sales channel. Brands can use TikTok to fuel product development, create new shopping experiences with features like TikTok LIVE, and find new advocates by partnering with creators and affiliate partners. Additionally, TikTok's advertising solutions help brands reach new audiences, re-engage existing ones, and offer seamless transactions across the platform.

“

People craved a unique experience filled with discovery, which changed how we interact with brands, ultimately redefining what we believe is the future of shopping.

- Nico Le Bourgeois, Head of US Operations, TikTok Shop

“ TikTok is very unique. It’s the freshest thing we’ve seen in social media because of how consumable the content is and the power of video.

- Director of Brand Marketing, Beauty



of TikTok users agree that TikTok Shop offers a unique way to shop directly on the platform<sup>1</sup>



of shoppers on TikTok have made a purchase after seeing an ad or shoppable content on TikTok<sup>1</sup>





# Strategies to Unlock Commerce On and Off TikTok

## 1 Capture Immediate Purchases with In-App Commerce:

**Harness the power of discovery and commerce with TikTok Shop, an integrated e-commerce channel built directly within TikTok.**

With TikTok Shop, businesses gain exclusive access to native features like shoppable videos, LIVE Shopping, and a shop page on a brand's profile. Additionally, TikTok Shop partners with a wide range of creators through its affiliate program to connect brands with authentic voices. To promote your TikTok Shop, there is a significant opportunity when a brand pairs native features with paid solutions like Shop Ads and GMV Max to maximize sales across your entire content ecosystem.

## 2 Maximize E-commerce with Always-On Tactics:

**Drive consumers to retail sites and e-commerce platforms by creating a full-funnel experience that flows seamlessly between in-app engagement and external purchases.**

Leverage TikTok's upper and mid-funnel ads to optimize the cross-platform journey with lower-funnel solutions to maximize e-commerce conversions. To accelerate e-commerce sales, lean into TikTok's AI-powered solutions like Smart+ to automate sales across e-commerce destinations like your website and app.

## 3 Drive Commerce Everywhere with a Hybrid Media & Commerce Strategy:

**Create a hybrid media and commerce strategy with TikTok that facilitates a seamless journey across physical and online environments, driving consumers from discovery on TikTok to direct purchases in retail stores or e-commerce platforms.**

In this hybrid strategy, TikTok ads drive traffic to retail and e-commerce touchpoints while also using TikTok Shop as an instant, in-platform e-commerce experience. To maximize performance, tap into AI-powered channel outcomes with GMV Max and Smart+.



To see how businesses are leveraging TikTok today, check out [TikTok For Business](#)

# Conclusion: Shaping the Future of E-commerce Together

TikTok is playing an innovative role in digital marketing by offering a fresh take on the traditional shopping journey. By blending engaging content with e-commerce innovations and working closely with commerce partners, the platform helps simplify product discovery and offers a seamless checkout, driving tangible results for brands both on and off platform. TikTok's combination of engaging content, impactful advertising solutions, and seamless transaction integration position it as a key player in the ever-growing e-commerce landscape. As the platform continues to evolve, it remains at the forefront of consumer trends, providing brands with unparalleled opportunities to connect with a diverse and engaged audience.





# Acknowledgements

## About TikTok

TikTok is the leading destination for short-form mobile video. Our mission is to inspire creativity and bring joy. TikTok has offices across the globe, including in Los Angeles, New York, London, Paris, Berlin, Dubai, Singapore, Jakarta, Seoul, and Tokyo.

## About Ipsos

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people. In our world of rapid change, the need for reliable information to make confident decisions has never been greater. At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth. This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People. To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder.

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# Methodology

## Quantitative Survey

- 20 minute online, device agnostic survey
- Fielded: August 19, 2024 - September 16, 2024
- Markets: United States (US), 18-65
- Sample Size: n=3,876 total completes, US Gen Pop, including general population and boosts
  - n=3,474 General Population
  - Boosting Shoppers on TikTok n=402
- Core/Secondary Shopper Channel Evaluation Qualifications:
  - General Usage: Use at least 1 social, 1 video, and 1 e-commerce site monthly or more often
  - "Shopping" Usage: Shopping behavior on at least one core or secondary platform
- Nomenclature
  - Other media platforms = Average of Instagram, Pinterest, YouTube, Google, Facebook
  - Other e-commerce platforms = Average of Pinterest, Amazon, eBay, Temu, Walmart, Target, Etsy
  - Shoppers on TikTok = Have used TikTok in the past 3 months for any part of the shopping journey

## Qualitative Interviews

- 45-minute web-enabled in-depth interviews
- Participants:
  - In-House e-commerce or Marketing and Agencies
  - Mix of verticals (In-House only): CPG, Beauty / Personal Care, Electronics, Entertainment, Fashion, Home & Living
- Summary of participants
  - Agency (n=2)
  - In-House e-commerce (n=4)
  - In-House Marketing (n=2)





# Sources

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1. TikTok Marketing Science US, Commerce Landscape Study 2024, commissioned by TikTok in collaboration with Ipsos
2. TikTok Marketing Science Global TikTok as a Discovery Engine Study 2023, conducted by Material
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5. [Fashion Executives on Finding Brand Success on TikTok](#), September 18, 2024
6. TikTok Marketing Science Global Creators Drive Commerce Study (US results) 2022 conducted by Material
7. All images are public domain from sites unsplash.com and pexels.com or were otherwise provided by TikTok

