

**From Query to Cart:**  
The Intersection of  
Search & Commerce



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"For years, the industry has accepted a fragmented journey where discovery and purchase are blocks apart. We are challenging that compromise. TikTok turns the entire digital ecosystem into a storefront by collapsing the gap between a spark of interest and a completed transaction. With 85% of users who search on TikTok moving directly to a purchase, we aren't just influencing the journey – we are accelerating it, proving that when friction is removed, commerce follows where confidence is highest."

### **JENNY FERNANDEZ**

TikTok Head of Research & Insights, Europe and Israel

"Commerce is entering a new era where discovery, evaluation, and purchase no longer happen in separate moments. Our new research with TikTok reveals fresh insights into how consumers build confidence and move from inspiration to conversion across a fragmented ecosystem. The opportunity for brands isn't just to show up earlier - it's to remove friction across the full path from inspiration to conversion, while protecting trust through transparency, relevance, and seamless experiences."

### **VIRGINIE BRIAND**

CMO Deloitte Central Europe

"AI is changing how people narrow choices, but trust is still built through real experiences, real people, and real context. For brands, the opportunity is to connect both worlds in a way that makes decisions easier and faster"

### **DAVIDE FABRIZIO**

Partner, Deloitte Advanced Analytics Spain



## **INTRODUCTION**

# From Discovery to Decision: How the Lines between Search, Social, and Commerce are blurring

Consumer buying behavior is evolving - not in sudden unpredictable swings, but in consistent, observable ways shaped by culture, platforms, and technology. Yes, people still follow recognizable patterns of consideration and evaluation, but they now expect clearer guidance, faster paths to answers, trustworthy signals, and seamless ways to act when interest develops.<sup>1</sup> The journey from discovery to purchase flows across different platforms, formats, and moments, influenced by communities, creators, and increasingly, AI. And within this, TikTok Search has become a key part of how people make sense of what they discover, turning entertainment, trends, and creator content into searchable, shoppable moments. In this report, we connect these search behaviors to lower funnel outcomes - what people do next, where they ultimately buy, and what increases the likelihood of conversion.

Today, a potential purchase might start with a short video, get reinforced by a creator, gain community validation through comments, shared experiences, and real voices - and ultimately end in a purchase wherever people choose to buy: in-app, on a marketplace, on a retailer's site, or in a physical store.<sup>2</sup> Consumers move between tools and channels with purpose: choosing whatever feels most helpful, trustworthy, or efficient at that point in

their decision-making process. As a result, the traditional boundary between "search" and "shopping" has dissolved. Search is no longer just typing a query into a search engine. It's every moment someone tries to understand, explore, or evaluate, whether that spark comes from entertainment, trends, recommendations, or a direct question. And because these moments can transition smoothly into action, search has become an integrated part of the purchase experience.

Social and video platforms now play a central role in this behavior as they can drive conversion across all phases of the purchase journey. They reveal needs people haven't named yet, introduce new products and categories, and help them evaluate with real experiences and real voices. By connecting discovery, evaluation, and decision, these platforms are essential in converting curiosity into considered purchases - and in creating entirely new demand across the ecosystem.

Social and video platforms play a complementary role with AI tools and traditional search engines - while they provide cultural context, real experiences, and community validation, AI search tools pull information together across channels and streamline research.

Traditional search remains important, especially for verifying details and ensuring efficient decision-making. However, confidence-led decisions increasingly happen on social and video platforms, where trusted community validation plays a central role.

The result: Traditional search is no longer the center of discovery - it's one layer in a much larger, interconnected discovery and commerce ecosystem. Consumer behavior is changing alongside shifts in platforms and technology, and brands and marketers need to evolve with it. What matters now is showing up at the moments when early interest turns into intent, when exploration becomes evaluation, and when decisions happen quickly across different environments. Search and commerce are no longer separate steps - they're one connected behavior. And our global study of 5,000 consumers confirms this: people move fluidly between platforms to discover, research, and decide, often within minutes. Discovery, search, entertainment, and shopping have merged into a single, intent-driven journey. And increasingly, many shoppers stay within TikTok itself, using TikTok Search to go deeper without needing to leave the platform.

<sup>1</sup> Drenik, G. AI search is reshaping consumer behavior and brands must adapt, 2025. <https://www.forbes.com/sites/garydrenik/2025/06/12/ai-search-is-reshaping-consumer-behavior-and-brands-must-adapt/>

<sup>2</sup> TikTok Marketing Science & WARC. The Search Before the Search: How social and video have changed the way we seek, find, and buy, 2025.



### ***THE UBIQUITY OF INTENT***

## Search as an Integrated Commerce Engine

Search now shapes every stage of the commerce journey, from spontaneous discovery to product research and where-to-buy decisions. TikTok maintains a meaningful presence across these moments and often helps turn curiosity into purchase intent – supported by the influence of creator content, which plays an important role in moving users from exploring to buying.

### ***BOTH INTENTIONAL AND SERENDIPITOUS SEARCH MOMENTS GENERATE REAL COMMERCIAL IMPACT***

Search in all its forms - whether on TikTok and its search function, across other social and video platforms, in AI environments, or through traditional search engines – now happens across multiple touchpoints and platforms, with the potential to trigger intent and drive decision-making along the customer journey.

Of course, there is no one-fits-all approach: Some people search with a clear result in mind, for example finding a product to buy, comparing features, or solving a specific need. Others search in more exploratory ways: learning something new, gathering ideas, or discovering unfamiliar options. And often, discovery begins without intentional search at all. These motivations shape how consumers transition from interest to action, making search a decisive – and often immediate – driver of commercial outcomes rather than just information retrieval.

## TIKTOK'S ROLE ACROSS THE SHOPPING JOURNEY

% of TikTok users who use TikTok in each stage, from early journey curiosity to purchase readiness

### DISCOVER PRODUCTS UNINTENTIONALLY WHILE SCROLLING OR WATCHING CONTENT

57%<sup>3</sup>

### ACTIVELY SEARCH FOR IDEAS OR INSPIRATION FOR SOMETHING THEY MIGHT BUY

38%<sup>4</sup>

### RESEARCH OR COMPARE SPECIFIC PRODUCTS

28%<sup>5</sup>

### LOOK FOR WHERE TO PURCHASE

25%<sup>6</sup>

Unintentional discovery is a major entry point into the purchase journey on TikTok, where products can surface serendipitously and spark early interest even when users are not actively searching. Among TikTok users, **57%** say they passively discover products on the platform - most often while scrolling the For You Page (**44%**), watching creator videos (**40%**), or encountering viral items (**40%**). These moments don't just introduce products; they frequently initiate the pathway toward more targeted research and eventual purchase, on TikTok Search or other platforms. For brands this demonstrates that early-stage, unplanned discovery now carries real commercial weight.

At the same time, active discovery plays a parallel role. When users are unsure what they want or need, they turn to TikTok to search for ideas, explore solutions, and scan categories. As the leading social and video platform for proactive shopping inspiration, **38%** of TikTok users rely on it as their primary source when actively seeking ideas. These moments often mark the starting point of shopping intent, as users refine preferences and move closer to decisions - all within the same environment where the initial spark occurred.

As a user's intent strengthens, search becomes more task-oriented. Around **28%** of TikTok users use the platform to research and compare specific products. While search engines (**31%**) and retailer or brand websites (**26%**) remain relevant for detailed validation, TikTok Search increasingly complements these destinations. People want real experiences, honest opinions, and visual walk-throughs - inputs that help them evaluate with more confidence and clarity.

These behaviors also translate into queries close to the actual purchase. **25%** of TikTok users turn to the platform for "where to buy" searches. This sits alongside search engines (**32%**) and retailer sites (**27%**) as part of the final stage of decision-making. TikTok's presence here reinforces that it does not only spark interest; it also supports the final steps that bring users closer to transaction.

**Taken together, these patterns show how TikTok spans the full search spectrum, from early journey curiosity to concrete product evaluation and purchase readiness. The platform shapes both spontaneous and active discovery and plays a meaningful role in how consumers validate choices and decide where and how to buy.<sup>7</sup>**



<sup>3</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.  
<sup>4,5,6,7</sup> Ibid

## BRIDGING THE GAP: HOW TIKTOK SEARCH IS TURNED INTO SALES PERFORMANCE

Across the funnel, social and video platforms - TikTok in particular - play a powerful role in moving people from initial interest to decisive action, with features like TikTok Shop enabling direct, in-platform purchases. People often use TikTok Search to actively discover new products, exploring ideas and options before validating details such as availability, pricing, or returns. This combination of emotional resonance and rational validation drives stronger outcomes than either environment alone.



TikTok stands out for its ability to translate search-driven moments into purchases. For example, both Answear and Bolt validated their full-funnel TikTok activations through Unified Lift studies, demonstrating measurable incremental impact across brand and conversion outcomes.<sup>8,9</sup>

Our research shows a similar trend: among people who use TikTok for inspiration, **83%** say it ultimately led to a purchase - higher than other social and video platforms. Among those who use TikTok for product research and comparison, **86%** report that this activity led to a purchase, also outperforming other social and video platforms. TikTok's search bar functions as a strong full-funnel signal: **85%** of users who used the search feature on TikTok to learn more about a product or brand, say it has led them to buy something.

### CONVERSION IMPACT BY TIKTOK ENTRY POINT

% who say using TikTok at each stage ultimately led to a purchase

**INSPIRATION** ————— **83%**<sup>10</sup> —————→ **PURCHASE**

**RESEARCH** ————— **86%**<sup>11</sup> —————→ **PURCHASE**

### CONVERSION IMPACT USING TIKTOK SEARCH BAR

% who say using TikTok search bar to learn more about a product ultimately led to a purchase

**SEARCH BAR** ————— **85%**<sup>12</sup> —————→ **PURCHASE**

Creators play a vital role here, they act as trusted guides who bridge curiosity and action. **59%** of TikTok users report being inspired to purchase after seeing a creator's video or post, with organic creator content being especially influential.<sup>13</sup> Their content delivers clarity, context, and confidence - key ingredients for high quality decision-making. This trust layer explains why TikTok consistently outperforms other social and video platforms in converting search-driven intent into real conversion outcomes. The platform compresses the distance from discovery to purchase by offering inspiration, validation, and guidance in one place.

<sup>8</sup>TikTok for Business. Answear Poland Case Study: Full Funnel Performance via Unified Lift, 2026. Brand awareness +10.6%; total conversions +25.52%; conversion rate +9.96%. <https://ads.tiktok.com/business/en-US/inspiration/answear-poland-case-study>

<sup>9</sup>TikTok for Business. Bolt Case Study: Unified Lift Validates Full Funnel Impact, 2026. Ad recall +9.2%; purchase lift +15.65%; intent +3.7%. <https://ads.tiktok.com/business/en-GB/inspiration/bolt-success-story-unified-lift>

<sup>10</sup>TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.  
<sup>11, 12, 13</sup> Ibid



### **THE INTEGRATED INTELLIGENCE LOOP**

## When AI Efficiency and Human Validation Work Together

As we have seen, intent now appears everywhere - from unintentional discovery to the final steps before purchase. And because people move fluidly across platforms to make sense of that intent, they look for tools that help them process it more quickly. This is where AI enters the journey. It is becoming a meaningful part of the shopping journey, helping people generate ideas, compare options, and decide where to buy. But shoppers rarely rely on AI alone. They turn to tools like TikTok Search for human validation - creator proof, real experiences, and community signals - creating an AI-TikTok loop that sharpens choices, builds confidence, and strengthens commercial outcomes.

### **KEY TAKEAWAYS FOR BRANDS**



**Develop relevant content** to connect with audiences by tapping into their interests and lifestyles; invest in gaining a clear understanding of how your brand fits into their lives. TikTok's advertising solutions like Smart+, Search Ads, and GMV Max with TikTok Shop help reach users at the right moment.



**Develop various content types tailored to stages** of the sales funnel - from inspiration to demos to comparisons to shoppable moments, with the help of creators.



**Make it easy to be found:** Analyze search queries, include relevant keywords in the content and use Smart+ Catalog Ads and GMV Max to appear when users actively search.



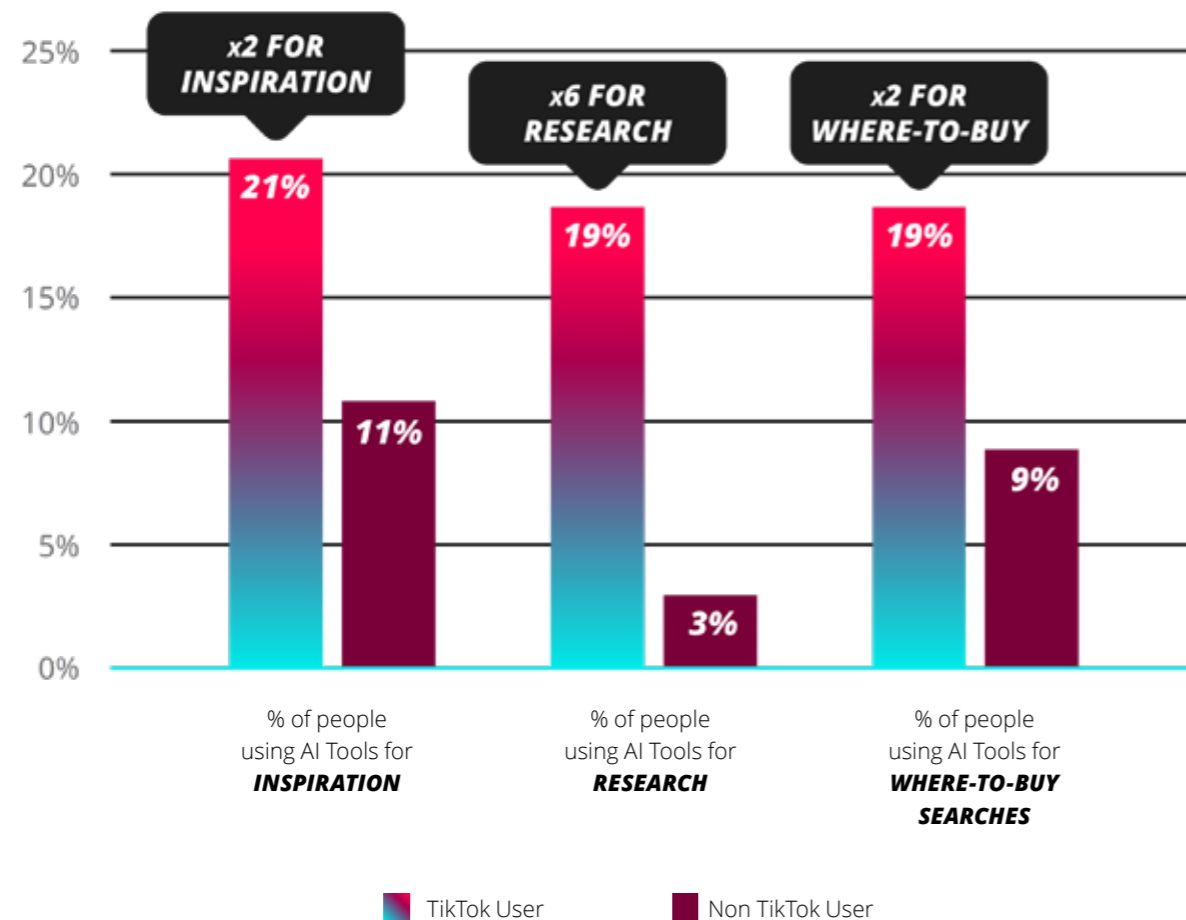
Evaluate the **right balance of organic and paid activities**, depending on your audiences.



**FROM AI RECOMMENDATION TO HUMAN REASSURANCE:  
A NEW PATH TO PURCHASE**

Our research shows that AI use across the commerce journey is not yet mainstream, but it carries important implications for brands. Around **16%** of consumers surveyed already use AI tools or chatbots for inspiration, **15%** for research and comparison, and **15%** to determine where to buy. AI shopping assistants show similar behavior. **Among TikTok users, this pattern is even stronger: they use AI tools between two and nearly six times more than non-users across every stage of the journey.**<sup>14</sup>

**AI TOOL USAGE IS HIGHER AMONG TIKTOK USERS—  
ESPECIALLY DURING PRODUCT RESEARCH.**<sup>15</sup>



<sup>14</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>15, 16, 17, 18</sup> Ibid



Consumers increasingly turn to AI because it offers speed, clarity, and structured guidance throughout the shopping process. AI helps them narrow options and make decisions more efficiently, providing a helpful starting point before they look for deeper reassurance elsewhere.

**76%**

say AI Tools help them make purchase decisions more quickly.<sup>16</sup>

**76%**

find AI Tools helpful when choosing what to buy.<sup>17</sup>

**40%**

trust AI to surface relevant information.<sup>18</sup>

But most people still value human context. AI can streamline choices, yet human stories and real experiences provide the reassurance shoppers look for before committing. Many see the best results when AI's efficiency is paired with the results of TikTok search, such as authentic reviews, creator input and social proof - elements that make decisions feel more reliable and complete.

**HUMAN CONTEXT MATTERS:**

76%

say AI assistants are helpful, yet human narratives increase confidence.<sup>19</sup>

57%

want validation before buying.<sup>20</sup>

52%

believe the best experience combines filtering via AI with real reviews from real people.<sup>21</sup>

These patterns show why TikTok, its search function, and AI increasingly work in tandem within the commerce journey. AI helps narrow choices, while TikTok brings those options to life through real experiences, creator input, and community proof. As these behaviors converge, shoppers move naturally between both environments - setting the stage for the emerging TikTok-AI loop.

<sup>19</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>20,21</sup> Ibid



**EFFICIENCY MEETS CULTURE:  
THE AI-TIKTOK VALIDATION LOOP**

Our data shows that shoppers move fluidly between AI environments and TikTok - not in a linear path, but in a loop where each platform strengthens the other. When people use AI tools, they often return to TikTok to pressure-test what AI suggests. Conversely, when TikTok sparks an idea, people sometimes go to AI for clarification or alternatives. This interaction offers a clear window into emerging dynamics in modern commerce.

Many start their journey on TikTok or other social platforms and then turn to AI to deepen their understanding - using it to clarify information,

compare alternatives, or verify whether popular or creator-recommended items are genuinely worth considering. But after AI narrows the field, shoppers frequently return to TikTok Search to validate those results. There, they search for real video reviews, creator opinions, and community reactions to confirm whether AI's suggestions feel trustworthy and relevant.

These human signals provide a level of tangibility and authenticity that AI alone cannot offer, reinforcing why people rely on both environments as part of the same decision-making loop.

**OUR DATA SHOWS CLEAR BEHAVIORS THAT DEMONSTRATE THIS TWO-WAY DYNAMIC:**

**AI → TIKTOK:**

When people start with AI and then move to TikTok

77%

say real product use in video feels more trustworthy than AI answers.<sup>22</sup>

74%

return to social and video platforms to narrow choices when AI gives too many options.<sup>23</sup>

**TIKTOK → AI:**

When product inspiration begins on TikTok and then continues in AI

77%

of AI users use it to learn more about products they first saw on social and video platforms.<sup>24</sup>

68%

use AI to verify whether viral products are worth it.<sup>25</sup>

<sup>22</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>23,24,25</sup> Ibid

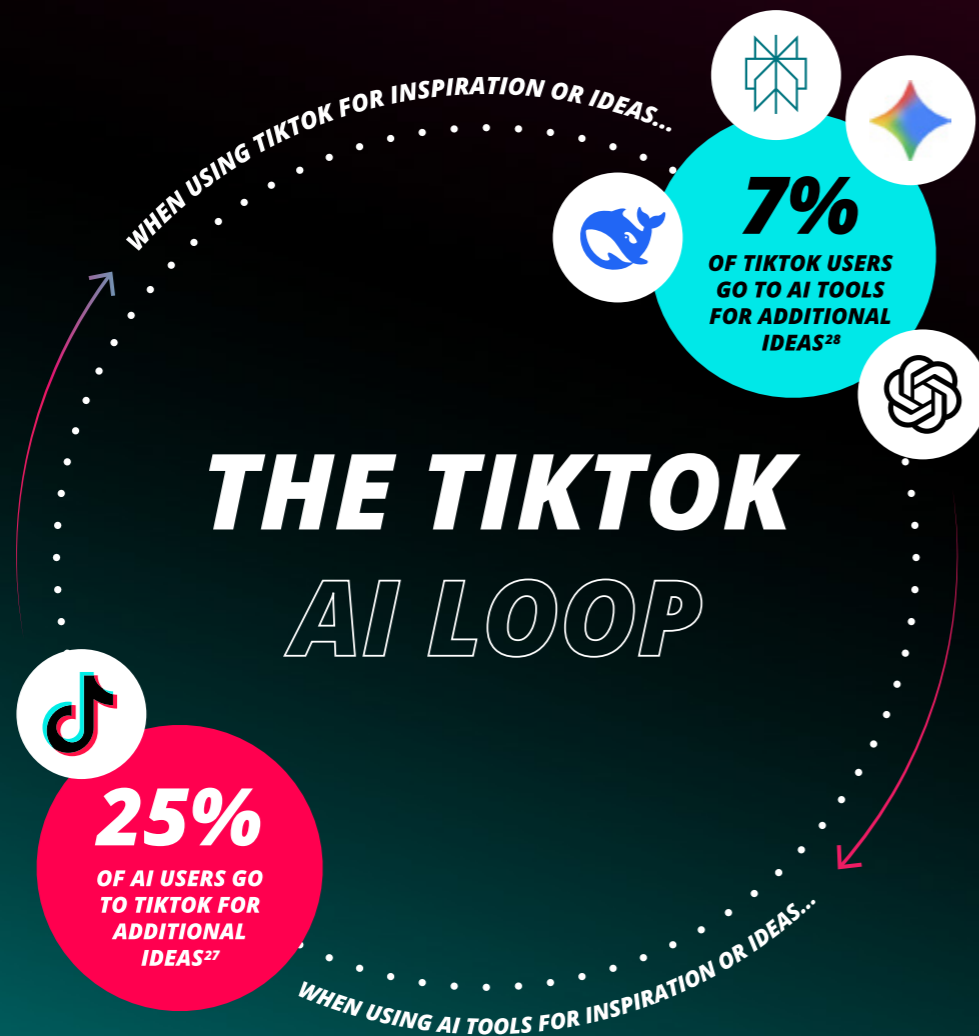
Directional data reinforces this loop. After using AI tools or chatbots (such as ChatGPT or Gemini) for inspiration, **25%** of AI users go to TikTok for additional ideas, and a similar share does so after using AI for research. AI-powered shopping assistants (such as Amazon's Rufus, Klarna's AI assistant, or Perplexity Shopping) show the same pattern, with **30%** turning to TikTok for further

inspiration and a comparable percentage returning for deeper evaluation. Movement also flows from TikTok to AI - **7%** of TikTok users go to AI for extra ideas, and a similar proportion for further research - but the overall volume is significantly higher in the AI to TikTok direction. This is a strong signal that users find individually relevant information on the platform.<sup>26</sup>

This AI-TikTok loop shows how people blend structured information and human context to make decisions that not only make sense but also feel right. AI sharpens the field; TikTok adds confidence. Brands need to show up in both places: structured and visible in AI-driven environments, and culturally relevant, community-validated, and shoppable on TikTok, where consumers close the loop and convert.

## APPROACH TO ENABLE AI USE CASES

- ➔ Evaluate current (marketing) capabilities, identify weak points, and assess the potential impact of AI.
- ➔ Create a realistic target picture that defines where AI can help optimize existing activities and where it can enable entirely new ones.
- ➔ Prioritize measures based on expected impact, implementation effort, and the time required for each measure to take effect.



<sup>26</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>27,28</sup> Ibid

## KEY TAKEAWAYS FOR BRANDS



**Review your brand's discoverability and representation on AI tools** to ensure metadata and catalog inputs match TikTok Search, TikTok Shop, and Smart+ surfaces for consistency across the AI-TikTok loop.



**Optimize content for AI discoverability** by connecting it to TikTok Search Ads and Smart+ so TikTok becomes the validation layer after AI-driven comparison.



**Leverage creator content and endorsement to ensure validation of AI results** and to optimize representation of the brand in AI tools. Use Spark Ads, TikTok One and Symphony Creative Studio to scale high trust creator formats that close the gap left by AI's lack of human proof.

### THE ECOSYSTEM ADVANTAGE

## Showing Up Across the Multi-Touchpoint Journey

People rely on different platforms for different parts of the shopping journey and move between them as their needs shift. As we have seen, social and video platforms – especially TikTok – provide the real-life validation AI cannot replace, while traditional search engines, AI tools, and retailer or brand sites add the structure needed for comparison. TikTok also performs strongly at both ends of the purchase journey, supporting discovery and driving action.



## PEOPLE USE DIFFERENT PLATFORMS FOR DIFFERENT JOBS - AND COMBINE THEM TO MAKE DECISIONS

Across the commerce ecosystem, platforms play distinct roles in how people understand, evaluate, and choose products. Social and video platforms excel at providing cultural context and real-life validation. TikTok in particular gives shoppers a clear sense of how products look, feel, and perform through creator experiences, demonstrations, and unboxings. When people use TikTok Search for research, their motivations are grounded in authenticity: real reviews or experiences, recommendations from people who have tried the product, and seeing the product in action. Other leading social and video platforms show similar patterns, with strong demand for learning how products work and seeing real-world performance.

These platforms help people judge whether a product fits their needs, and after that, they often look elsewhere for details like features, pricing, or where to buy.

While social and video platforms like TikTok increasingly offer on-platform depth through solutions such as TikTok Shop – enabling users to discover, compare, and purchase without

leaving the app - many consumers still view retailer and brand sites as the places that provide the most comprehensive product detail. Yet TikTok's growing role in final stage decisions is clear: TikTok Shop is the top destination users say they want to be directed to after clicking on an ad.<sup>29</sup> Outside the platforms, retailer and brand-led environments deliver the structured information shoppers look for: they help users compare products, understand features and benefits, confirm that a choice is right for them, and determine where to buy. In this sense, retailer and brand sites continue to play a complementary role in the journey, offering the deeper, more specific validation that supports final decisions.

Traditional search engines help people check the basics: they compare different products, look up features, figure out where to buy, and scan review summaries. AI tools play a similar role but make it quicker to sort through information - helping users understand features, compare brands, review feedback, and narrow their options.

What AI can't replace is the visual and peer validation people find on social and video platforms - where they search for genuine experiences to judge whether a product fits their life.

<sup>29</sup> TikTok Marketing Science US + UK Unlocking Web + App Optimization Research via AYTM, August 2025. (n=600)

<sup>30</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

## HOW PLATFORMS COMPLEMENT EACH OTHER IN CONSUMER DECISION-MAKING<sup>30</sup>

	MAIN ROLE	WHY PEOPLE USE IT (TOP MOTIVATIONS)	STRENGTH
<b>SOCIAL AND VIDEO PLATFORMS (TIKTOK + OTHERS)</b>	Inspiration and real-life validation ("see it in action").	<b>TIKTOK SEARCH:</b> real reviews/experiences 44%, recommendations 42%, demos/unboxings 42%.	Creators & community social proof; emotional/contextual confidence; TikTok is strong among social and video platforms on purchase helpfulness
		<b>OTHER SOCIAL AND VIDEO:</b> learning how products work 50%, user reviews 46%, real-world performance 46%.	
<b>RETAILER / BRAND SITES &amp; APPS</b>	Deep product detail and final confirmation	Compare options 54%; learn features/benefits 57%; confirm right choice 50%; where to purchase 38%.	Specs, availability, structured reviews, purchase readiness; perceived trust and helpfulness
<b>TRADITIONAL SEARCH ENGINES</b>	Broad comparison and routing layer across sources.	Compare brands/products 55%; learn features 57%; determine where to buy 51%; review summaries 47%.	Neutral aggregation; fast scanning and cross-site validation; perceived trust and helpfulness
<b>AI TOOLS &amp; ASSISTANTS</b>	Fast synthesis and narrowing choices (decision engine).	AI tools: learn features 60%; compare 54%; review summaries 48%; where to buy 40%. AI Assistants show similar motivations (~45-50%).	Structured answers, reduced cognitive load, efficient decisioning; perceived trust and helpfulness

Across all of these environments, people use each platform for a specific purpose. Social and video platforms help them get inspired and understand products in context. Search engines and AI tools help them evaluate across sources. Retailer and brand sites help them finalize decisions. Together, these roles support the full arc of omnichannel commerce.

## SHOPPERS MOVE ACROSS CHANNELS BY DEFAULT – AND CONVERSION FOLLOWS WHERE CONFIDENCE PEAKS

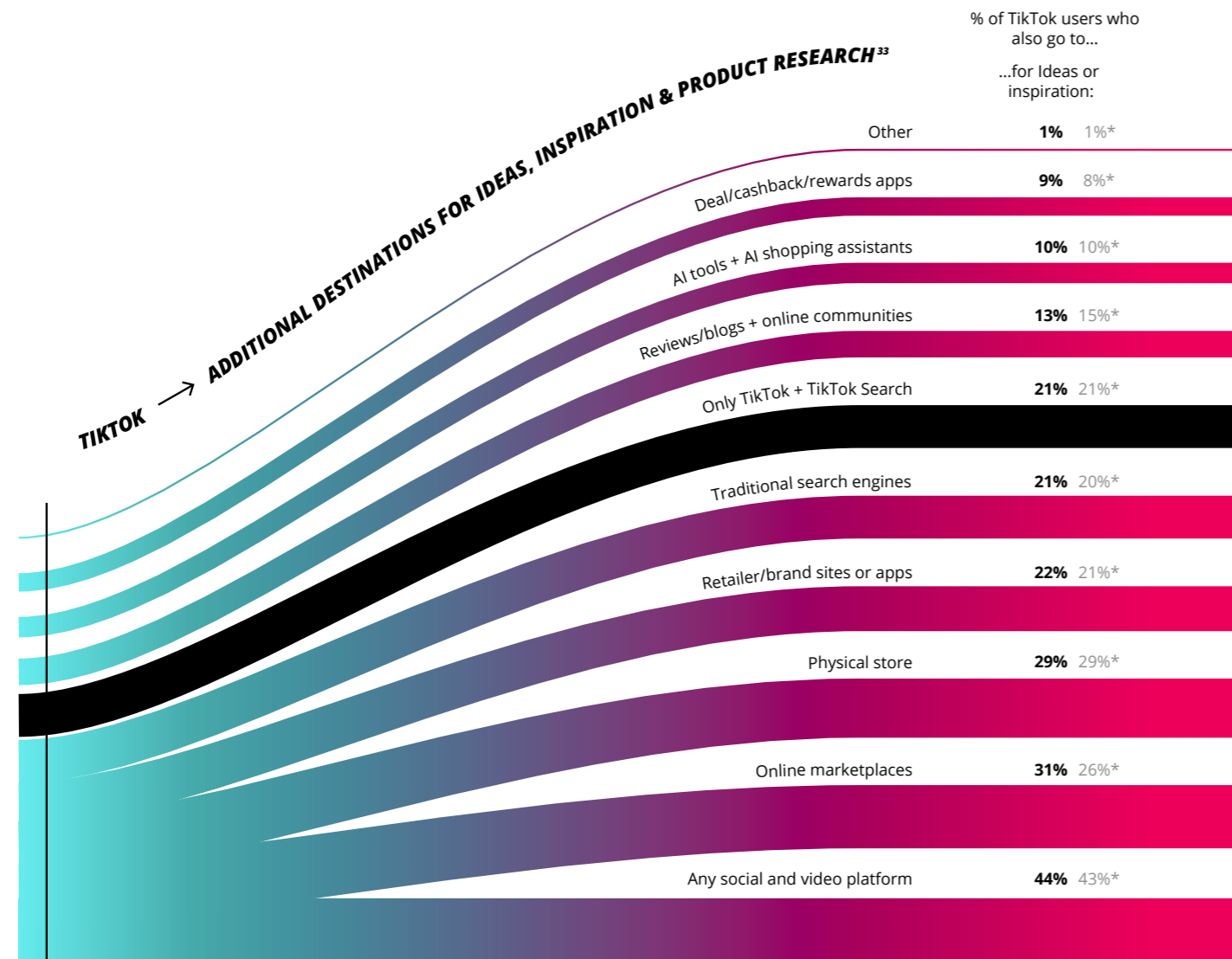
A defining feature of omnichannel shopping today is how rarely consumers stay on a single platform once interest is sparked. When people begin discovery on TikTok, they typically add two additional touchpoints to the process – most often an online marketplace (31%) or a physical store (29%) – and only about 21% rely solely on TikTok for new product discovery. This pattern also includes a meaningful shift toward traditional search engines, with around 21% of users turning to traditional search engines to gather additional ideas or inspiration during early-stage exploration. The same pattern holds in the research phase: 21% remain on TikTok, for deeper research, while most continue their evaluation elsewhere, commonly moving to physical stores, other social and video destinations, or marketplaces. This cross-platform movement is further validated through measurement: for instance, J.Crew confirmed this behavior via a Unified Lift Search Study, in which TikTok exposure drove 64,000 incremental searches and generated a measurable uplift in search-driven conversions – showing how TikTok triggers intent that is then captured on traditional search platforms.<sup>31</sup>

Importantly, this movement is not one-directional: Around a quarter of users who start on other social and video platforms also turn to TikTok during discovery and research, positioning TikTok as both a strong starting point and a frequent return point, as users come back with clearer intent and a more defined idea of what they want to search for.

This multi-platform movement extends all the way to the point of purchase. When TikTok users use the platform to figure out where to buy a product, 41% complete the purchase directly on TikTok (the so-called “closed loop”), while substantial shares convert off-platform (the “open loop”): 39% purchase in physical stores, 34% through online marketplaces, and 26% via retailer or brand websites/apps. In other words, TikTok performs strongly in both modes, driving immediate in-app conversion while also creating demand that flows outward into the channels where transactions traditionally happen. Notably, TikTok’s on-platform purchase share at this step is higher than other social and video platforms (41% vs 34% for social and video platforms),

reinforcing that TikTok is not just an influencing factor but that it can also function as a point of sale when shoppers are ready to act. This becomes even clearer when TikTok users are asked: **seven in ten say that TikTok search results make it easy to purchase within the app, including through TikTok Shop.**

Other channels show similar “routing” patterns: when users consult traditional search engines to locate where to buy, 54% complete the purchase through an online marketplace and 33% through a retailer/brand website/app; when users begin on retailer/brand sites, final purchases split nearly evenly between marketplaces (50%) and brand-owned channels (49%). Together, these patterns reinforce a consistent omnichannel truth: people move between platforms based on what they need in the moment. TikTok’s role within this flow is distinctive because it contributes meaningfully to conversion inside the platform while also driving outbound commerce to marketplaces, retailer sites, and physical stores, making it a central touchpoint in the search and commerce journey.<sup>32</sup>



\*% of TikTok users who also go to ... (for product research)

### KEY TAKEAWAYS FOR BRANDS

- Review your current journey and funnel maps and tech stack to **enable full journey transparency.**
- Analyze your audience’s purchase journeys to **understand the role of each touchpoint.** Adapt your marketing tactics, content, and budget to the strengths of the involved touchpoints and platforms. Combine TikTok Search Ads Campaign, creator formats, TikTok Shop, and Smart+ to cover discovery through purchase.
- Evaluate the use of on-platform tools** such as TikTok Smart+, TikTok Search Ads, and GMV Max to optimize marketing activities and shorten the journey from discovery to purchase. **GMV Max identifies the highest converting creatives/creators and scales them automatically.**

<sup>31</sup> TikTok for Business. J.Crew Case Study. J.Crew Unified Lift Search Study measured a +6% relative lift in search-driven conversion rate, 64K incremental searches, and a \$6 incremental cost per search, demonstrating TikTok’s ability to generate external search intent and downstream conversions. Unified Lift Search Impact. 2025.

<sup>32</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>33, 34, 35, 36, 37</sup> Ibid

**TIKTOK PERFORMS STRONGLY IN THE PURCHASE JOURNEY, CONVERTING USERS AFTER A “WHERE TO BUY” SEARCH.**

#### IN-APP CONVERSION:

41%

of TikTok users complete their purchase on-platform.<sup>34</sup>

#### DEMAND THAT FLOWS OUTWARD INTO TRADITIONAL COMMERCE CHANNELS:

39%

of TikTok users buy in physical stores.<sup>35</sup>

34%

of TikTok users buy through online marketplaces.<sup>36</sup>

26%

of TikTok users buy via retailer or brand websites or apps.<sup>37</sup>

**THE INFLUENCE MULTIPLIER:**

# How Full-Funnel Presence Drives Cross-Platform Conversion

Treat TikTok Search, traditional search, and commerce as one connected system - because consumers already do.

The future of commerce belongs to brands that show up at the intersection of inspiration, information, and ease. And nowhere is this more visible than in the way people now search and shop as one continuous behavior.<sup>38</sup> When brands understand how organic discovery, structured search, whether on TikTok or elsewhere, and seamless conversion touchpoints work together, every search moment – serendipitous or intended – becomes a commerce opportunity.

This shift goes beyond the evolution of search alone.<sup>39</sup> Traditional search is still an important behavior, but it no longer exists in isolation. People search on traditional search engines or within platforms like TikTok, explore while they shop, and validate while they scroll.<sup>40</sup> A product moment can spark from a video, trigger a search on TikTok, generate an AI comparison, lead to a price check on

a traditional search engine, and end in a purchase on TikTok Shop, a marketplace, or a retailer site – often within minutes. Search, whether on TikTok or on a traditional engines, is now embedded inside the broader act of shopping, and commerce is happening in the same places where interest begins.

The brands that win in this environment are those that treat search and commerce as one system. Traditional search engines remain important, but they are now one layer within a multi-platform commercial journey shaped by TikTok's creator-led discovery, AI's structured guidance, and retailer and marketplace environments where final choices are confirmed.<sup>43</sup> Success depends on orchestrating visibility and relevance across all these touchpoints – not optimizing for a single channel but moving with consumers as fluidly as they move across platforms themselves.

<sup>38</sup> Nadel, D. How AI and culture will redefine e commerce in 2026, 2025. Forbes Technology Council. <https://www.forbes.com/councils/forbestechcouncil/2025/12/17/how-ai-and-culture-will-redefine-e-commerce-in-2026/>

<sup>39</sup> DHL eCommerce. 2025 social commerce trends, 2025. <https://www.dhl.com/global-en/microsites/ec/e-commerce-insights/insights/reports/2025-social-commerce-trends.html>

<sup>40</sup> IBM Institute for Business Value & National Retail Federation. Generative AI is reshaping consumer decisions before shopping begins, 2026. <https://newsroom.ibm.com/2026-01-07-ibm-nrf-study-brands-and-retailers-navigate-a-new-reality-as-ai-shapes-consumer-decisions-before-shopping-begins>



## SOCIAL AND VIDEO CONTENT DELIVERS THE CLARITY AND TRUST SHOPPERS NEED TO MOVE FROM INTEREST TO INTENT

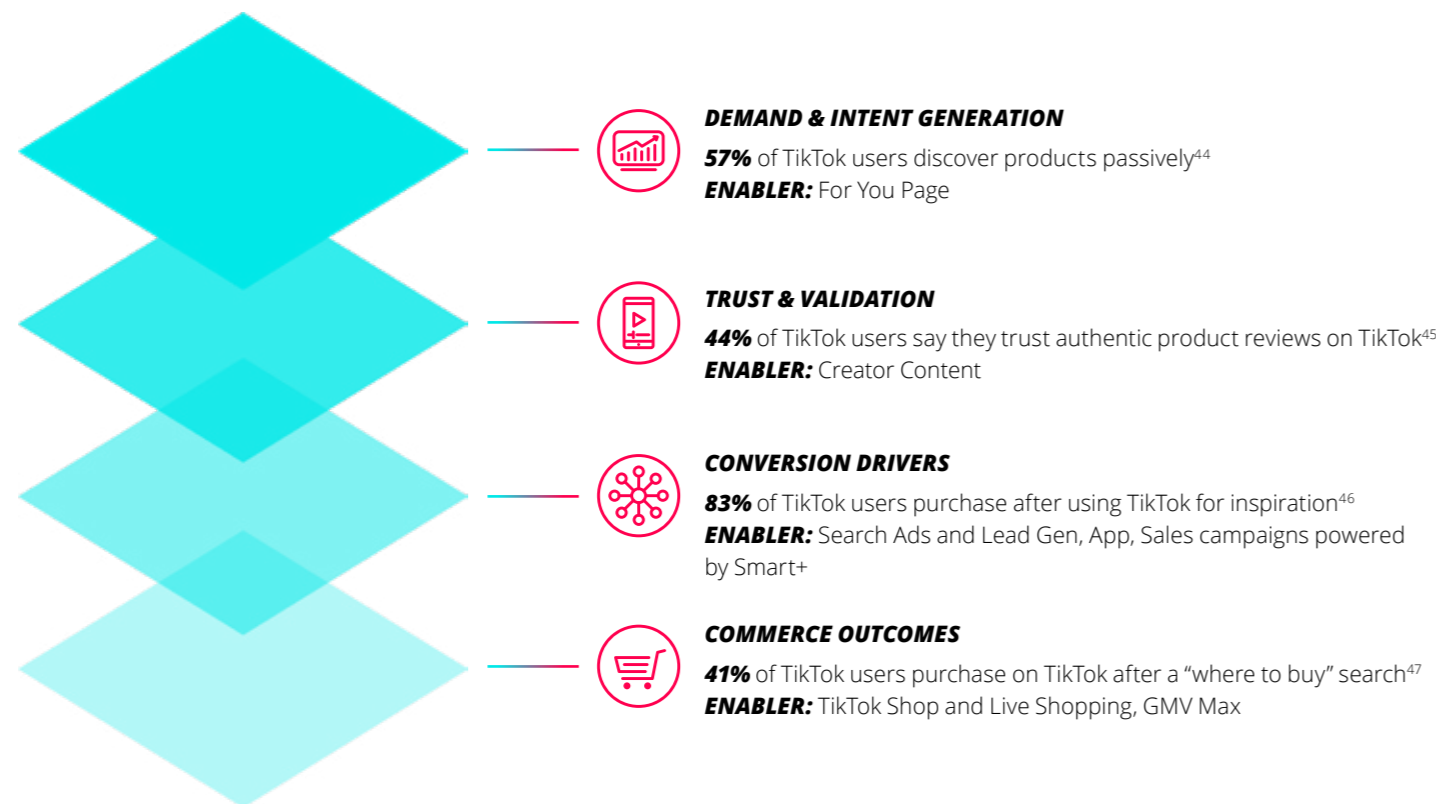
Social and video platforms have become default environments for discovering, understanding, and deciding what to buy. People don't separate "searching" from "shopping" anymore - they look for ideas, or stumble upon them, compare options, and validate choices in the same places where they watch content and get inspired.<sup>41</sup> TikTok in particular gives consumers the context they need to make confident decisions: real experiences, lived perspectives, creator guidance, and visual proof of how products actually work.

At the same time, AI tools play a complementary role by structuring and synthesizing the information people need to evaluate products quickly. This dual system, structured clarity from AI and cultural validation from TikTok, is what shortens decision cycles and increases conversion throughout the

journey.<sup>42</sup> Traditional search engines and retailer sites continue to play important roles, but they now fit inside a broader, interconnected process where discovery and purchase flow seamlessly.

Across this ecosystem, the platforms don't compete - they reinforce one another. Inspiration on TikTok triggers structured research in AI. AI-driven summaries send people back to TikTok for real world proof. Traditional search engines confirm details. And retailer sites or TikTok Shop make the sale. The brands that succeed in this world are those that understand how these environments work together, and design their strategies around the interplay of culture, structure, and commerce rather than treating each platform as a silo.<sup>43</sup>

### TIKTOK AS A COMMERCE ENGINE



<sup>41</sup> TikTok & Ipsos. Commerce Redefined (U.S. thought paper), 2024.

<sup>42</sup> Lauris, R. The new e-commerce playbook for 2026: Trust, profitability and AI, 2026. Forbes Business Council. <https://www.forbes.com/councils/forbesbusinesscouncil/2026/02/18/the-new-e-commerce-playbook-for-2026-trust-profitability-and-ai/>

<sup>43</sup> Deloitte Digital. State of social research 2025, 2025. <https://www.deloittedigital.com/us/en/insights/research/state-of-social-research-2025.html>

<sup>44</sup> TikTok Marketing Effectiveness Research. Global Search x Commerce Survey, conducted by AYTM, 2025.

<sup>45, 46, 47</sup> Ibid



## BRANDS WIN BY BEING VISIBLE, HELPFUL, AND SHOPPABLE WHEREVER INTENT EMERGES

Staying discoverable in a Search and Commerce world requires more than visibility. It requires showing up at the moments when curiosity turns into intent - and making it effortless for consumers to move from inspiration to action across every touchpoint they use. People now blend discovery, research, validation, and purchase across social and video platforms, AI assistants, traditional search engines, retailer sites, marketplaces, and physical stores. Brands must match that behavior with strategies that work across the full journey, not in isolated channels.

To operate effectively in this new environment, four priorities stand out:

### 01

#### TURN DISCOVERY INTO ACTION WITH A HYBRID SEARCH AND COMMERCE STRATEGY

Show up where inspiration happens and capture intent the moment it forms by pairing discovery formats with TikTok Search Ad Campaigns.

### 02

#### ACTIVATE ACROSS FORMATS TO MOVE PEOPLE THROUGH THE JOURNEY

Use multiple surfaces (creator content, paid media, TikTok Shop, websites, and apps) to keep users moving from spark to purchase.

### 03

#### LET AI DRIVE PERFORMANCE ACROSS ALL COMMERCE ENDPOINTS

Use TikTok's AI-powered tools like Smart+ Catalog Ads and GMV Max to automate sales, personalize delivery, and convert demand wherever users choose to buy.

### 04

#### HARNESS THE POWER OF THE MULTI-TOUCHPOINT ECOSYSTEM

Treat TikTok and TikTok Search, AI tools, search engines, marketplaces, and physical stores as one connected system, and ensure your brand is present, consistent, and shoppable across all of them.

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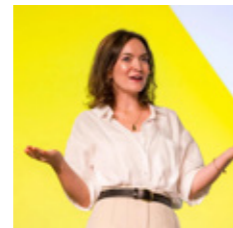
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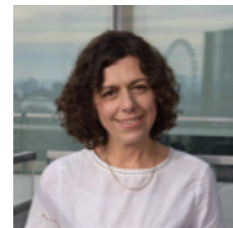
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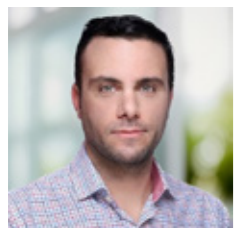
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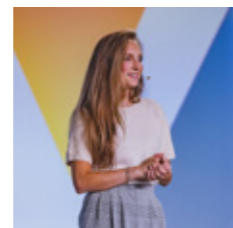
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