

Why Ignoring TikTok Shop is a Strategic Risk

Social commerce is reshaping how beauty shoppers discover, decide and purchase — both within and beyond the platform

NielsenIQ



What is TikTok Shop?

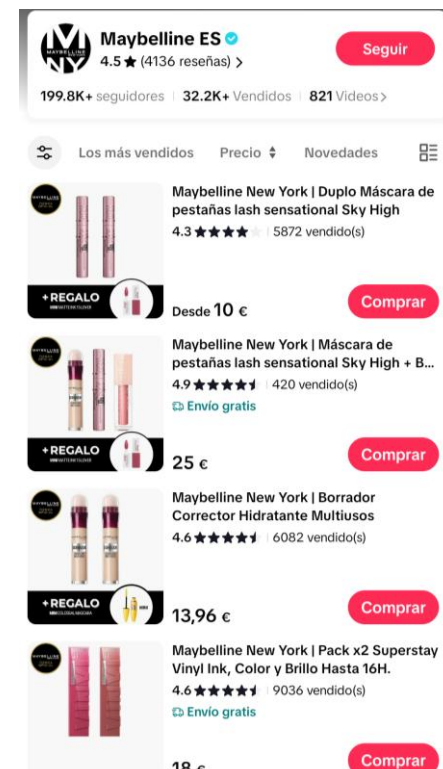
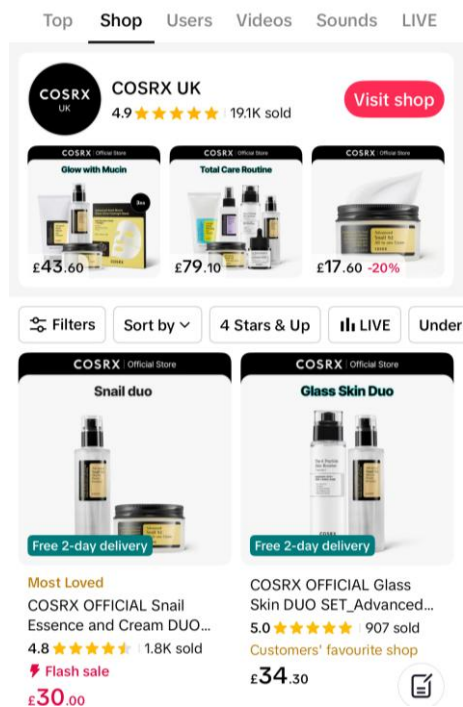
TikTok Shop is a unique social commerce platform, where products are sold to customers through videos and live events.



An **integrated e-commerce platform** in the TikTok app, a popular social media platform.

Users can **search for products** to buy but, most commonly, they are advertised to them by TikTok creators **through short videos**.

TikTok Shop offers **deals and discounts**, with **bundle deals**, **store-wide/product-specific coupons** and **flash sales** on their shop and during live events, driving impulse purchases for scrolling users.

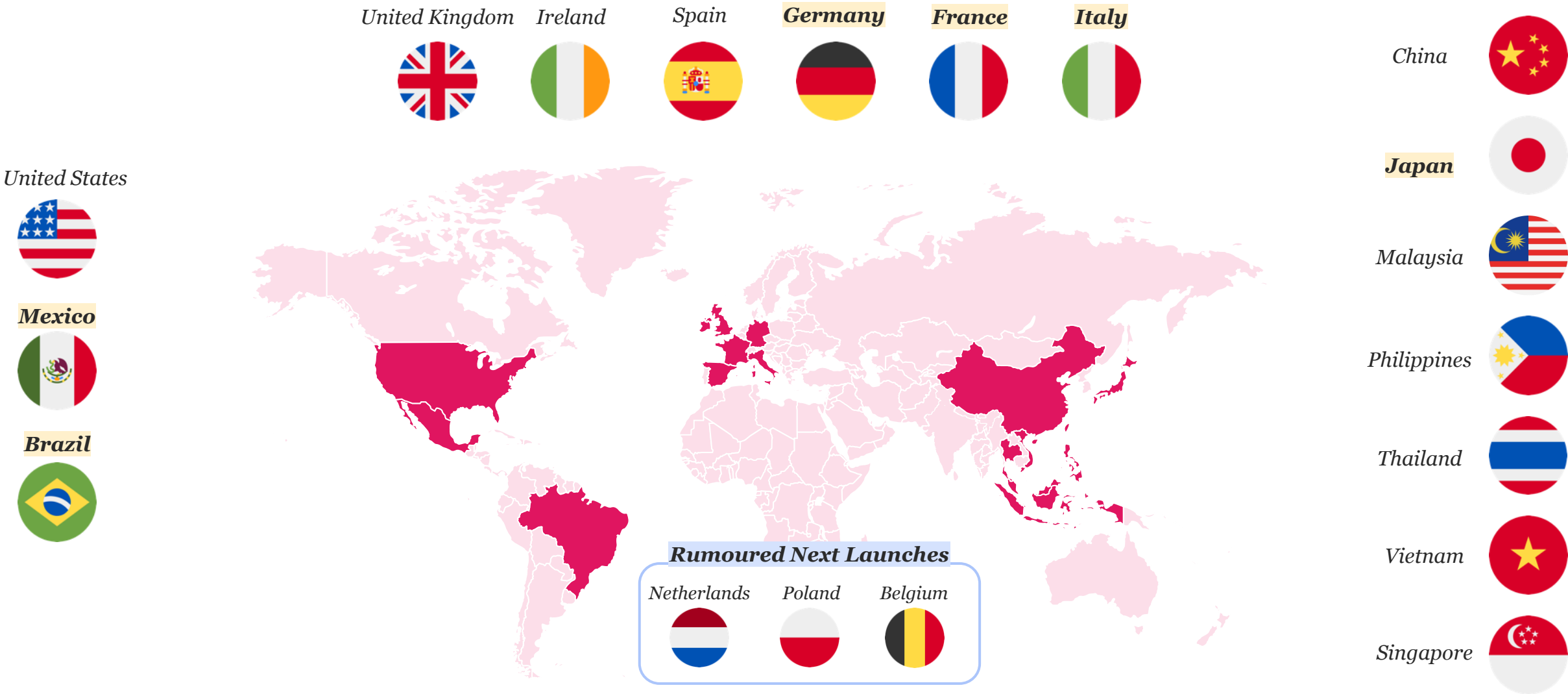


Source: Screenshots from TikTok app (GB & ES)

Where is TikTok Shop Available?

NEW in 2025

TikTok Shop is currently available in 16 countries across Asia, West Europe and the Americas



Sources: [TikTok Shop Available Countries In 2026 \(Official List\)](#) | [TikTok Shop prepares for entry into Poland and the Benelux](#)

Where Can You Measure TikTok Shop?

NielsenIQ Digital Purchases gives a 360 view of the online market to understand shares, trends, product performance and consumer behaviours

The most advanced and the most reliable consumer panel for e-commerce in the US & Europe

6M

E-SHOPPERS

GDPR

COMPLIANT

+2K

ONLINE
MERCHANTS

3 YEARS

BACK DATA

THE MOST ACCURATE DATA

PASSIVELY ACQUIRED - DELIVERED WEEKLY

TRUSTED
BY

amazon

ASOS
discover fashion online

KIKO
MILANO

LOOKFANTASTIC ...



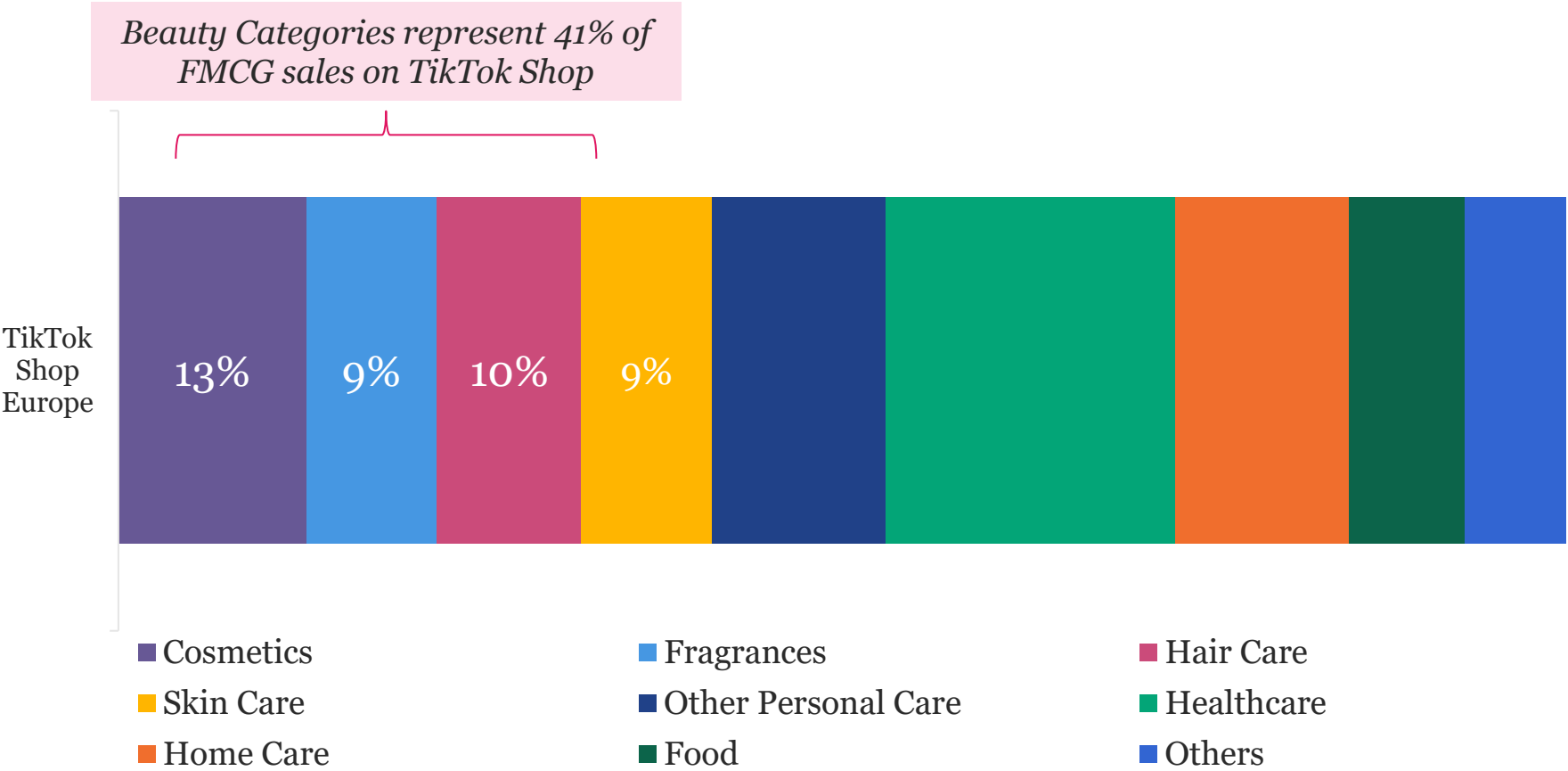
Contact to Know More: Agathe.Apollin@nielseniq.com



Beauty Categories are the Core of TikTok Shop's Sales

The top FMCG categories shopped on the app include beauty, personal care and health

Category contribution to total FMCG value sales - TikTok Shop

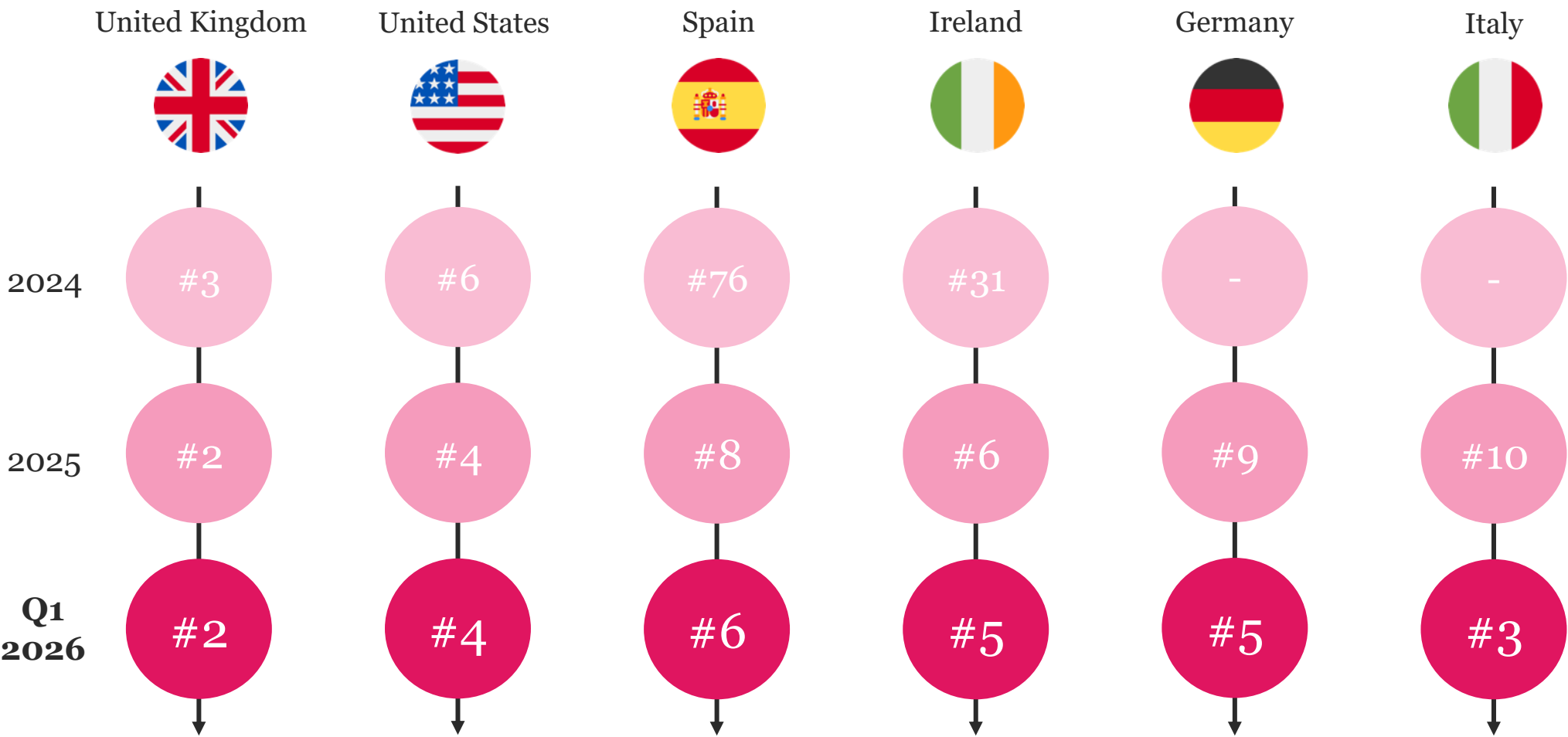


Source: NielsenIQ Digital Purchases Latest 52 weeks ending 29th March 2026 – Cosmetics, Hair Care, Fragrances, Skin Conditioning & Moisturising, Facial Cleansing and Sun Care

TikTok Shop is Establishing Itself as a Top Online Beauty Retail Destination

Western expansions have been met with considerable success at TikTok Shop continues to climb the retail ranks

TikTok Shop Ecommerce Merchant Rank - Beauty



Source: NielsenIQ Digital Purchases Latest 52 weeks ending 31st March 2026 – Cosmetics, Hair Care, Fragrances, Skin Conditioning & Moisturising, Facial Cleansing and Sun Care | Rakuten US Jan & Feb 2026

TikTok Shop has Attracted New Buyers and Increased Category Spend

Almost one third of the platform’s beauty customers in year one had not purchased beauty online in the previous year

TikTok Shop Year-1 Customer Analysis



1) Attracted **new category buyers**

31%

31%

29%

Of TikTok Shop’s beauty buyers in year 1 did not purchase beauty online in the previous 12 months

2) Customers converted from the competition **spent more overall on beauty**

+ €37

vs Year Ago

+ €41

vs Year Ago

+ €47

vs Year Ago

Additional spend on the total beauty category by converted buyers compared to the previous 12 months



Source: NielsenIQ Digital Purchases– Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care

A Multi-Generational Shopper Base

Countering misconceptions that TikTok is only for Gen Z consumers, Gen X are overrepresented in the platform's sales

Index TikTok Shop vs Total Beauty
Share of Value Spend by Generation - United Kingdom 

Gen Z

116

Millennials

85

Gen X

114

Boomers

77

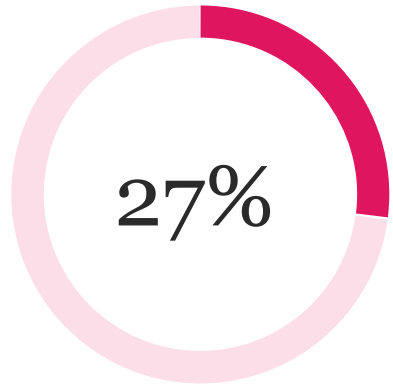


Source: NielsenIQ Digital Purchases United Kingdom, Spain, Germany, Italy & France – Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising

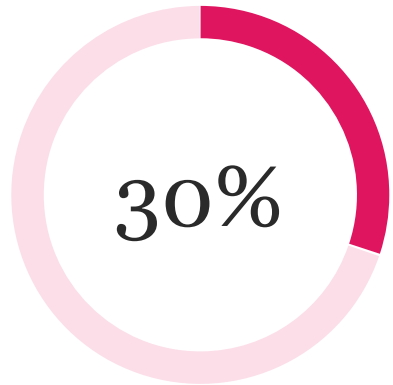


Luxury Buyers are Shopping on TikTok Shop

Consumers are not bound to one method of shopping, regularly shopping across the price spectrum for different needs & occasions



Of luxury beauty brand buyers also purchased beauty on TikTok Shop in the past 12 months



Of beauty specialist shoppers also purchased beauty on TikTok Shop in the past 12 months

Your consumer may regularly buy luxury brands at beauty specialists



Avg price: £118.21



Avg price: £8.80

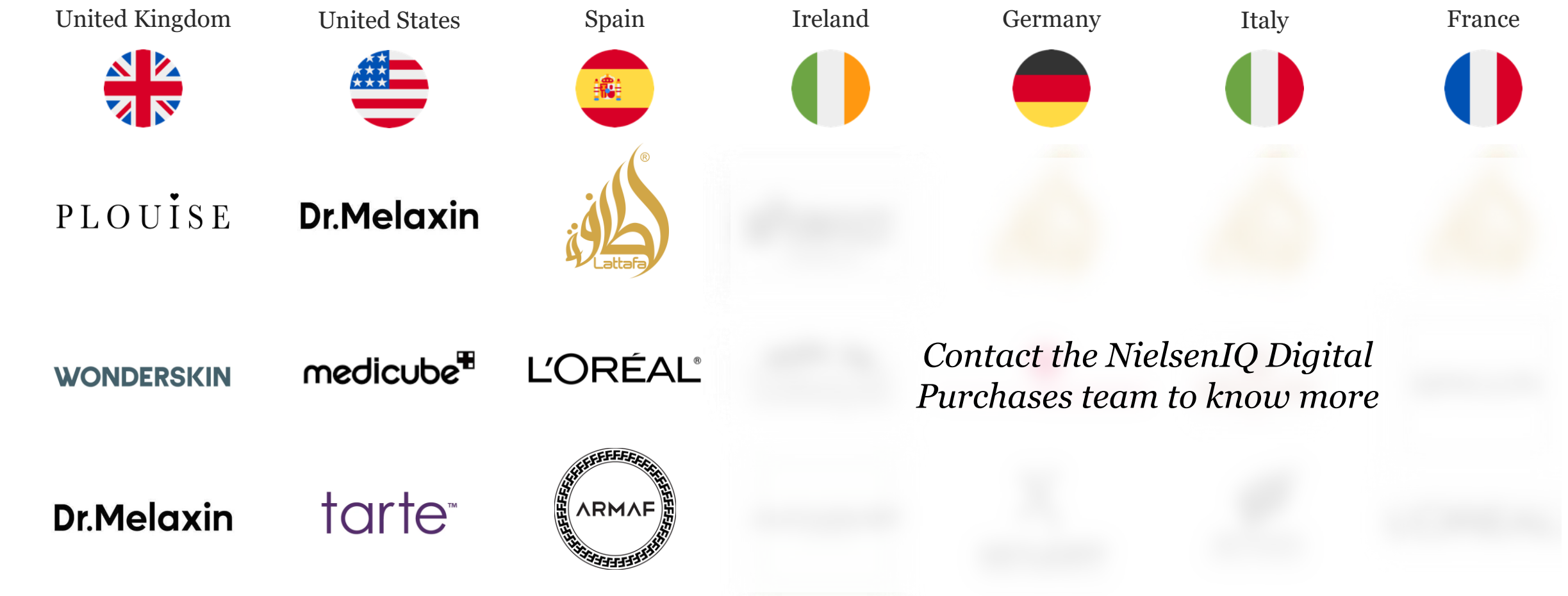
... and also buy everyday beauty items on TikTok Shop

Source: NielsenIQ Digital Purchases United Kingdom, Spain, Germany, Italy & France – Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care | Prestige Buyers based on a cohort of buyers based on 101 luxury beauty brands | *product image examples based on popular products purchased by luxury buyer cohort

A Platform for Both Established and Emerging Brands

TikTok Shop has created a pathway to success for many new players, whilst recognisable names have also embraced the platform

Top Brands on TikTok Shop by Value



Source: NielsenIQ Digital Purchases – Latest 52 weeks to 31st March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care

TikTok Shop Reshapes Discovery, Validation and Purchase Journeys

Social commerce is increasingly feeding demand into brands, retailers and wider commerce ecosystems as the path to purchase in beauty evolves

Search & Discovery

Social platforms are becoming product search engines

Community Validation

Creators, comments & virality replace traditional research & reviews

Traffic Driver to Retail & ECom

Viral content directs consumers to brand sites & retailers

Retail Amplification

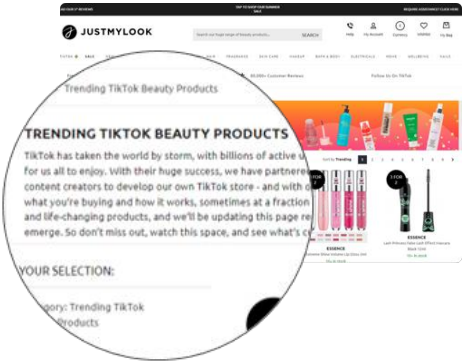
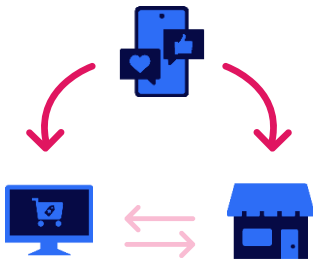
Retail curates assortments around viral demand

Native Social Commerce

Discovery, validation and purchase all in one interface

43%

of consumers are likely to search social media (e.g. TikTok) for product information before a traditional search engine (e.g. Google)



68%

of purchases on social selling platforms are made on impulse

Source: NielsenIQ Consumer Outlook | <https://www.justmylook.com/collections/trending-beauty>

Social Commerce is Impacting the Physical Retail Space

From livestream studios to pop-ups, brands are using stores to translate online virality into real world engagement and sales



MAC Cosmetics is offering its UK employees the opportunity to earn commission from sales generated through TikTok Shop, equipping its stores with dedicated mini studios to host live shopping broadcasts and product demonstrations on the platform

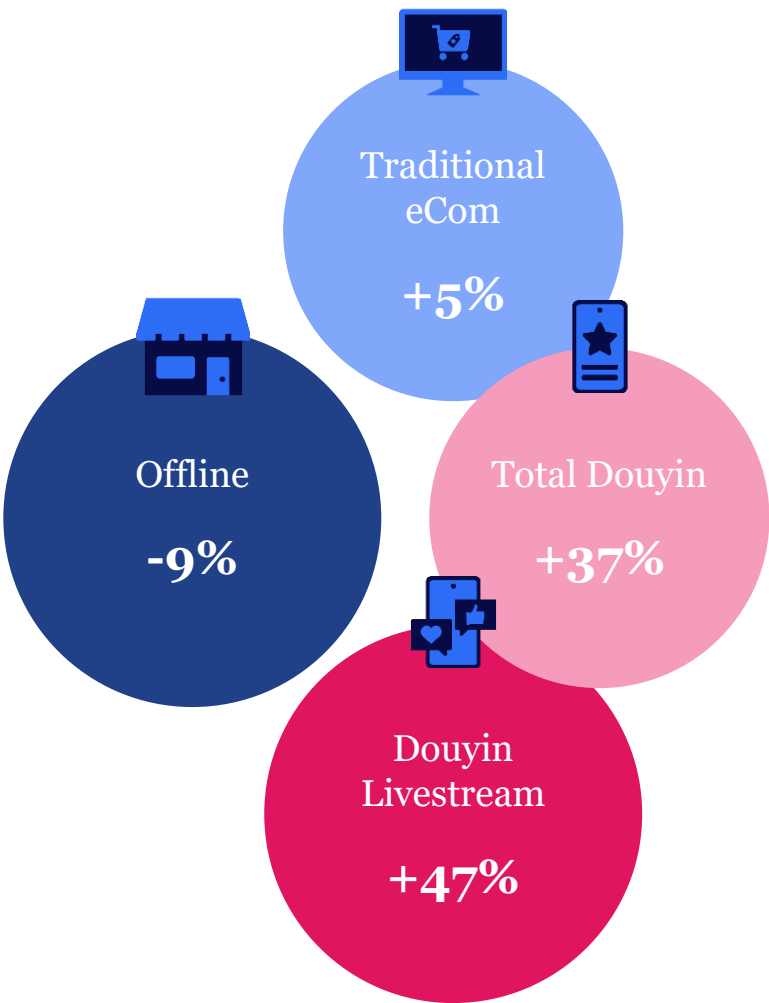
TikTok Shop brought a three-day beauty pop-up to London, introducing an immersive beauty hub for discovering viral products and brands. On-site, visitors could browse and buy products with QR codes that link directly to TikTok Shop

Source: [MAC Cosmetics to host live TikTok shopping events from its UK stores | The Independent](#) | [Community-Driven Shopping Experiences : TikTok Shop](#)

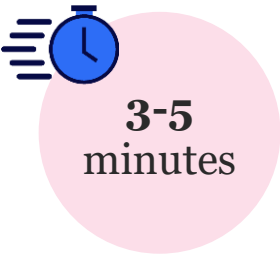
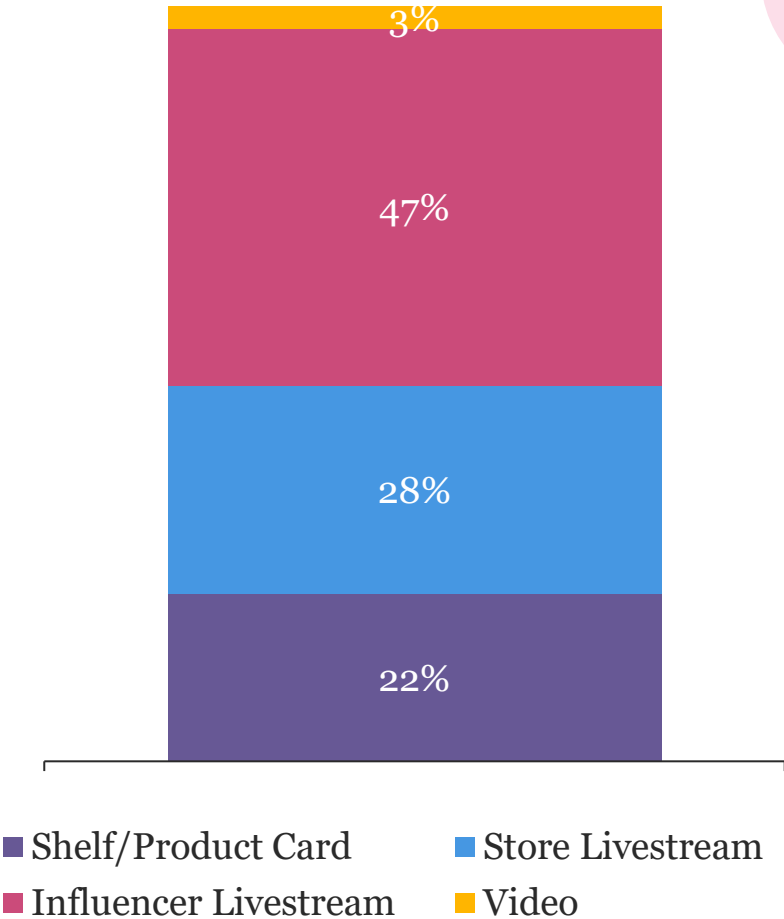
Entering a New Phase of Online Shopping



Livestream selling is fundamental to sales on Douyin, China’s native version of TikTok Shop, evolving social commerce live

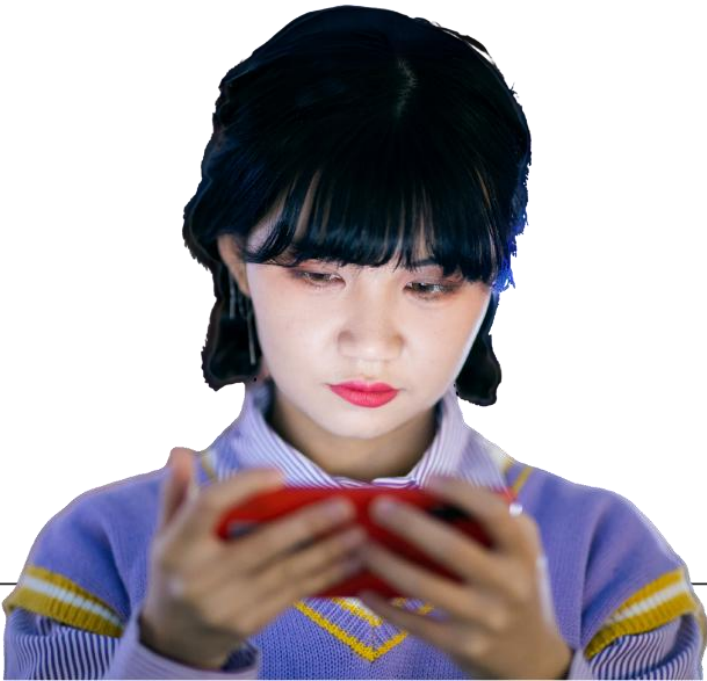


Douyin sales types distribution



Medium – Long videos have become the main format for brand deep seeding

- **Tutorial Content:** Makeup tutorials, skincare routines and related generally extended in duration
- **Brand Stories:** Using medium-long videos to tell brand philosophy and culture
- **Product Reviews:** Detailed product comparisons and effect demonstrations



Source: NielsenIQ eCom Panel FY2025 | MAT202506



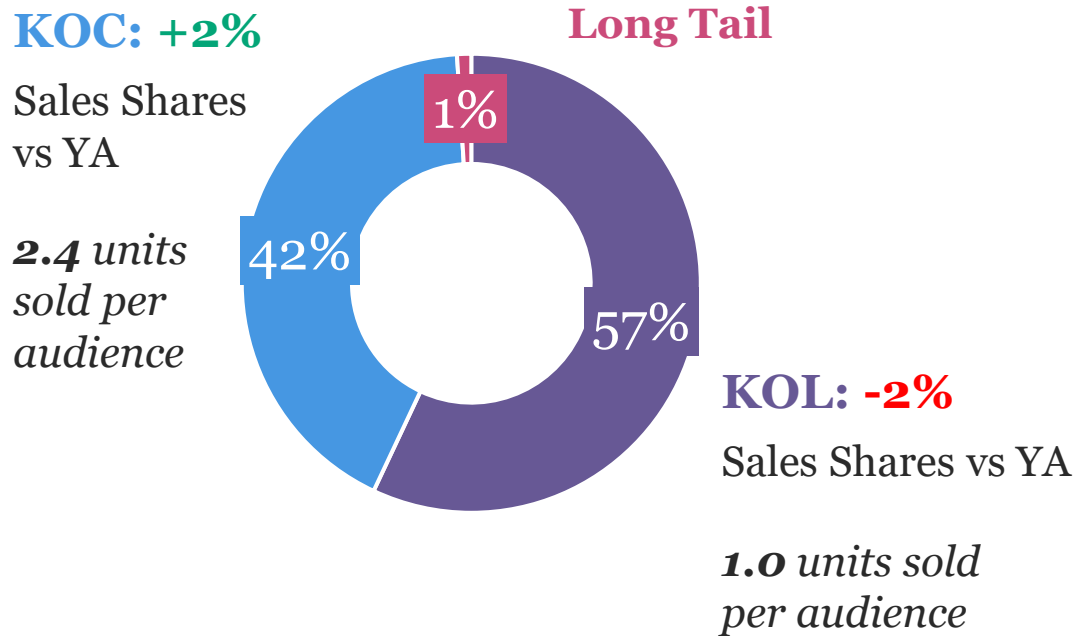
The New Trusted Advisors are Increasing Online and Peer-Led

Smaller influencers are shifting Douyin livestreaming towards a more strategic model matrix

Key Opinion Leaders (KOLs) are trusted, well-respected influencers with proven expertise in a particular field

Key Opinion Consumers (KOCs) are amateur enthusiasts in a certain field, but has greater decision-making influences among users on livestreams and can drive the purchasing behaviour of other potential consumers

Influencer Livestream Sales by Sales Type



Cost Efficiency

KOC collaboration costs are relatively low, with more controllable ROI

High Trust Level

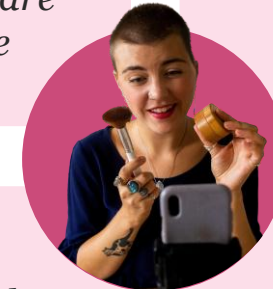
Stronger influence within specific circles

High Trust Level

Consumers are more likely to accept opinions from peers

Better Conversion

Stronger loyalty, better conversion effects



Source: NielsenIQ eCom Panel MAT202506

Why TikTok Shop Matters to Beauty

From changing discovery journeys to new brand winners, TikTok Shop is reshaping how beauty is marketed and sold

The Global Scale Phase

With a proven playbook for market entry, brands that invest early in TikTok commerce capabilities are best positioned to capture growth as the platform expands.

Multi-touchpoint Journeys

Consumers now move across social, retail and e-commerce touchpoints in their path to purchase, creating a more complex and dynamic journey.

Creators are the New Retail Front Line

Brands without a clear creator commerce strategy risk losing share of voice, relevance and conversion to more socially fluent competitors as creator recommendations and livestream selling rise in influence.

The New Brand Breakthroughs

TikTok Shop has become a launchpad for emerging and international brands. Established players that stay on the sidelines risk ceding cultural relevance, speed and experimentation to smaller, more agile challengers.

A Valuable Shopper Base

TikTok Shop is driving incremental beauty spend, with shoppers demonstrating strong purchasing to expand the category rather than simply shifting demand. Ignoring it risks leaving genuine growth untapped.



NielsenIQ Digital Purchases is Expanding!

Understand TikTok Shop's impact across the globe with Digital Purchases' consumer measurement

NielsenIQ is launching eCommerce panels in **Brazil, Mexico, Argentina, and Chile**. These panels will be the first foundational Digital Purchases datasets in the region, and we will plan to expand the specifications over time as adoption grows.



Brazil



TikTok Shop Launched May 2025



Mexico



TikTok Shop Launched February 2025



Chile



Argentina

NIQ Digital Purchases

A powerful e-commerce data platform—powered by the largest online consumer panel in the world—delivers digital shopping data and insights to help brands understand their market, competitors, and consumers.

One platform to unlock data from the world's largest online consumer panel

NIQ Digital Purchases aggregates data from billions of transaction emails and **more than 5M e-shoppers worldwide**. Covering more than 2,000 online merchants, including marketplaces, DNVB, D2C, and second-hand, the platform turns e-receipts into actionable insights and growth opportunities.

Currently available in:

US, FR, UK, DE, ES, IT, NL, BE, CH, IE, AT, IN

Thank You

Contact our team to learn more about NielsenIQ Digital Purchases

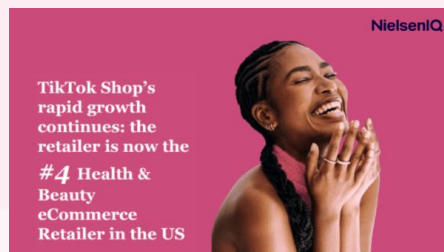


Agathe Apollin

Business Development

Agathe.Apollin@nielseniq.com

Read more on TikTok Shop with the Beauty Inner Circle



Tell Us Your Thoughts



How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied

NielsenIQ