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INTRO: TIKTOK SHOP LAUNCHES IN THE US





Introduction

The future of ecommerce is here. In September 2023, TikTok launched its highly anticipated ecommerce platform TikTok Shop in the US, rolling out in-app purchasing for all American users. The first reports are optimistic: During its launch, TikTok Shop already ranked in the top 20 Beauty & Personal Care ecommerce companies in the US.

As a result, TikTok became an even bigger ecommerce player than it was. Before the launch of TikTok Shop in the US, UK, and several Asian markets, the company was already profiting from an ecommerce revenue stream thanks to referral links from merchants on their TikTok for Business accounts.

While Beauty & Personal Care is not the top-selling ecommerce category overall, this segment has been one of the first to embrace the advent of social commerce and live commerce. Influencers and celebrities showing off products on social media hold great appeal to young consumers, meaning that Beauty & Personal Care products feel right at home in the TikTok Shop. Indeed, preliminary data shows that a staggering 85% of TikTok Shop sales are in the Beauty & Personal Care category.

This report explores how TikTok became an ecommerce force, its role in the social commerce landscape, and which brands are set to profit from this new shopping channel. Statista and Similarweb combine key figures with raw traffic data to give you all the insights you need to get started on TikTok for Business.

TikTok: A new shopping channel Similarweb version

The launch of TikTok Shop US is the latest chapter in a long line of ecommerce efforts by the social media sensation. Three years ago, TikTok first dipped its toes into the ecommerce waters via a partnership with Shopify, massively expanding the number of merchants on the platform. This maneuver was followed by the first TikTok Shop launches in Asia and the UK, with varying degrees of success.

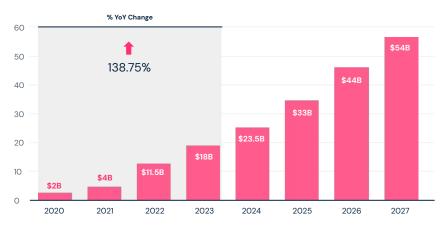
	Shopify partners with TikTok Merchants can directly link their Shopify stores to their TikTok Business accounts
February 2021	The first TikTok shop launches in Indonesia After the Shopify deal introduced referral link shopping, in-app shopping was first launched in Indonesia, quickly followed by other Asian markets
December 2021	TikTok Shop first launches in the UK The Shop is fraught with problems, including low demand, influencers dropping out, and internal issues
July 2022	TikTok abandons expansion plans After a failed UK launch in 2021 with low consumer demand and influencers dropping out, TikTok's plan to expand the Shop to Germany, France, and the US was abandoned
May 2023	TikTok Shop re-launches in the UK After a failed 2021 launch and scrapped expansion plans, TikTok starts to Beta test its revamped Shop in the UK
September 2023	TikTok Shop launches in the US In-app shopping is rolled out for the entire US market. This allows American users to buy items directly in the app
October 2023	TikTok Shop is banned in Indonesia New government regulations separate social media from ecommerce, thus banning the TikTok Shop

TikTok invested in user acquisition first to monetize its platform with growing advertising revenue

TikTok Advertising Revenue Forecast

In billion US dollars. Estimated data. Statista estimates using eMarketer data

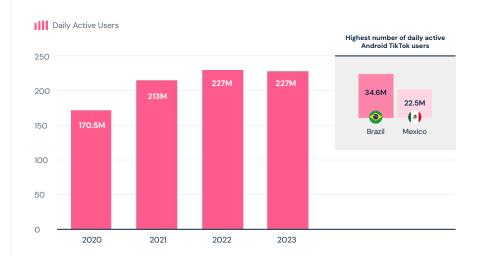




TikTok has several sources of revenue. This report focuses on the platform's recent ecommerce activities, however, advertisements have been a major lifeline for years. This data forecasts a significant increase in ad spending on TikTok as the social media platform continues to grow.

TikTok Daily Active Users Over Time

In million Android Daily Active App Users, Worldwide, Similarweb App Intelligence



TikTok's user base remained resilient even as people returned to their pre-pandemic routines. In the 12 months leading to September 2023, Brazil and Mexico displayed the highest number of daily active TikTok users on Androids, with 34.6M and 22.5M users, respectively.

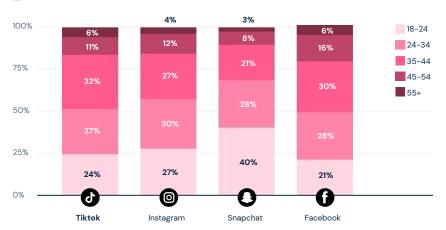
The typical TikTok user is not as young as we may think



Age Breakdown of Top Social Media Apps

Similarweb, US, Android, September 2023



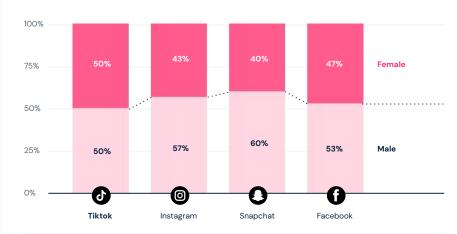


The largest age demographic on TikTok is 35-44 (32%). Only 51% of TikTok users on Androids are under 35 years old, and under 1/4 are below 25 years old. These are lower figures than under 35 year-olds on Snapchat (68%) and Instagram (57%).

Gender Breakdown of Top Social Media Apps

Similarweb, US, Android, September 2023





While other top social media platforms display a higher share of male users, TikTok has the most balanced gender split on Android.

Where do TikTok users shop in-app?

TikTok Audience Interests* - Top Shopping Apps

*Likelihood that an app's user base will use other apps in a given period Similarweb, Android, September 2023

#	App Title		
1	Amazon Shopping	6	AliExpress
2	Temu: Shop Like a Billionaire	7	Klarna Shop now. Pay later.
3	S SHEIN-Shopping Online	8	eBay: Online Shopping Deals
4	Vinted - Buy and sell clothes	9	The most rewarding way to Shop
5	o ASOS	10	Tesco Grocery & Clubcard

In the UK, TikTok users predominantly engage in cross-platform usage with Amazon Shopping, Temu, and Shein. In terms of category usage ranking, Shein and Temu apps exhibit greater popularity among TikTok users compared to the general population.

Compared to Instagram users, TikTok users are more likely to display a higher usage of shopping apps. Amazon Shopping, Temu, and Shein are in the top 25 cross-used apps with TikTok, whereas only Amazon is in the top most cross-used apps for **Instagram** users (at the 27th position).

#	App Title		
1	Amazon Shopping	6	Target
2	Temu: Shop Like a Billionaire	7	Etsy: Home, Style & Gifts
3	S SHEIN-Shopping Online	8	The most rewarding way to Shop
4	Walmart: Shopping & Saving	9	ib Ibotta: Save & Earn Cash Back
5	Fetch: Have Fun, Save Money	10	❷ AliExpress

In the US, TikTok users over-index in cashback app usage compared to the general population, with Fetch and Ibotta ranking higher in usage frequency than in the shopping apps category.

TikTok users also exhibit a higher usage frequency of Asian platforms like **Temu** (2nd rank vs. 3rd rank for the general population), Shein (3rd vs. 5th), and AliExpress (10th vs. 13th), which offer thousands of goods at a low price.

02 TIKTOK AND BEAUTY SHOPPING

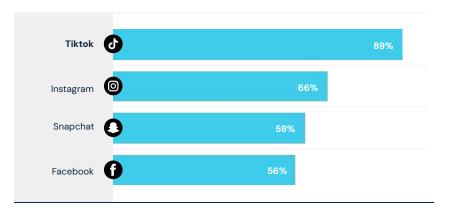


TikTok's role in Beauty social commerce

Beauty Product Sales Across Social Media

US, 2022. Statista using StyleSeat data.

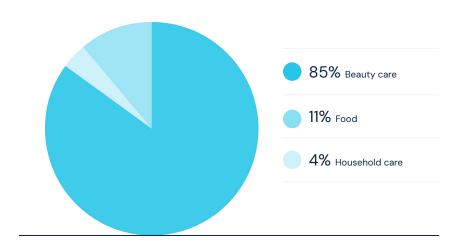




TikTok was the top social media platform for online Beauty product consumers in the US in 2022. That year, almost nine out of ten TikTok users purchased Beauty items on the platform. Instagram and Facebook users were also avid purchasers of Beauty care products.

Top TikTok Shop Product Categories

US, September 2023. Statista using NIQ data.



During the first month of its launch in the US, the Beauty category dominated sales: Approximately 85% of the most purchased products on TikTok Shop derived from the Health & Beauty category.

TikTok users are more likely to browse for pharmacy and Beauty retailers



Top Web Retailers Visited by TikTok Users, Ranked by Monthly Visits

Similarweb Market Research Panel, US, July-September 2023, n= 21,335

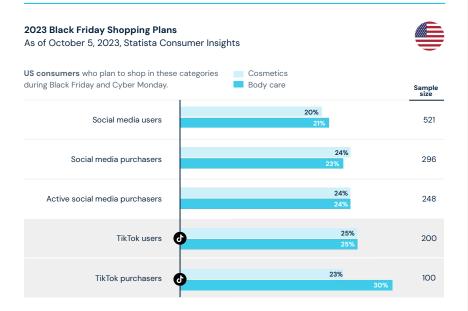
Including marketplaces					
Retailer	Share of visits				
amazon		54.4%	Walgreens	2.9%	
Walmart :		15.3%	KOHĽS	1.7%	
ebay		9.2%	COSTCO	0.8%	
♥CVS		4.4%	₽ POSHMARK	0.8%	
• TARGET		3.5%	★ macys	0.8%	

Without marketplaces						
	Rank for					
Retailer	TikTok users	whole population				
♥CVS	1	= 1	fresh	6	+4	10
Walgreens	2	+1 3	SEPHORA	7	•	7
P POSHMARK	3	+2 5	RITE AID	8	+1	9
★ macys	4	-2 2	NORDSTROM	9	-5	4
ULTA	5	+1 6	Sak Hith Avenue	10	-2	8

Based on a representative sample of 21,225 US consumers that used the TikTok app during July-September 2023, Amazon gets the highest share of visits (54%) from TikTok users, followed by other marketplaces.

However, it is still interesting to highlight that TikTok users over-indexed in Pharma and Beauty retailer visits against the general population: Target in total monthly traffic typically ranks higher than CVS, and Macy's higher than Walgreens.

US TikTok users and purchasers are more likely to make use of Black Friday for Body Care purchases



Similar to the UK, more US TikTok consumers expressed the intention of shopping for cosmetics and Body Care items during Black Friday and Cyber Monday sales vs. the average social media user.

British TikTok users and purchasers are more likely to hunt for cosmetics promotions on Black Friday



Statista's Consumer Insights survey found that one-third of TikTok users in the UK planned to partake in the Black Friday and Cyber Monday sales for cosmetics purchases.

Asian TikTok users more likely to buy Beauty products during the holiday season

Likelihood of TikTok vs. Non-TikTok Users Purchasing Beauty Products During the Holiday Season

Australia, Japan, South Korea, Philippines, APAC data. Surveyed in 2022. Statista using TikTok data.

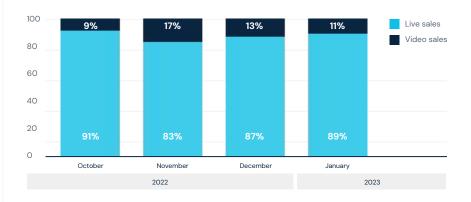


TikTok Insights data has revealed that on average, its users are x1.5 more likely to spend on Beauty & Personal Care products during the holiday season than non-TikTok users, and the trend is even stronger in the APAC region. Browsing the TikTok shop in the lead-up to the holidays is especially popular in Japan, where TikTok users claim to spend x2.3 more than non-users.

Live stream shopping drives Beauty sales on TikTok

Sales Distribution of Online Beauty Sales on TikTok

Global, October 2022 to January 2023. Statista using Shoplus data.



Globally, live commerce has proven to be the most successful way of engaging consumers in shopping for Beauty products on TikTok. In this interactive shopping experience, influencers and brands showcase their products in real-time through live streams. With pre-set shopping ads, consumers can easily purchase presented items through product links shown during the stream. One appealing feature of live shopping is the active engagement of the audience through live chats, which enables users to inquire about products and have their questions promptly answered.

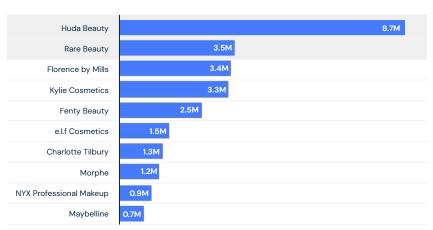
O3THE BEAUTY LANDSCAPE AND TIKTOK INFLUENCE ON BRANDS

TikTok's contribution to brand visibility for Cosmetics

Number of Followers of Leading Cosmetics Brands on TikTok

Global, 2023. Statista using Cosmetify data.



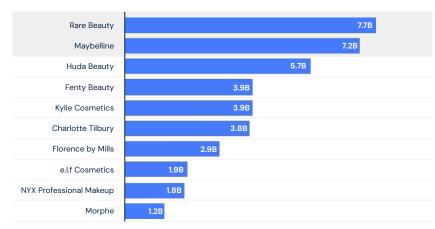


Among the leading cosmetics sellers on TikTok in 2023, celebrity brands had the highest number of followers. Huda Beauty secured first place, with around 8.7 million followers, with Selena Gomez' Rare Beauty in second place and topping 3.5 million followers.

Number of Hashtag Views of Leading Cosmetics Brands on TikTok

Global, 2023. Statista using Cosmetify data.





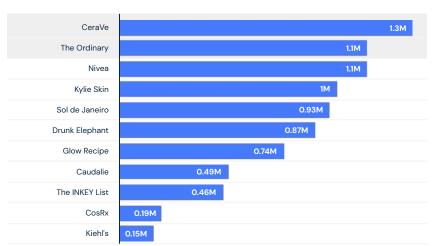
A TikTok presence can be highly beneficial for brand visibility: Rare Beauty registered 7.7 billion hashtag views on the platform. Non-celebrity brands like Maybelline also recorded impressive results.

How do skincare brands perform on TikTok?

Number of Followers of Leading Skincare Brands on TikTok

Global, 2023. Statista using Cosmetify data.



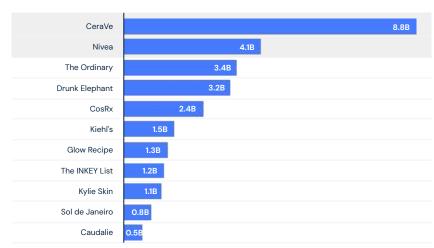


CeraVe, The Ordinary, and Nivea are some of the leading skincare brands on TikTok, with over 1 million global followers each.

Number of Hashtag Views of Leading Skincare Brands on TikTok

Global, 2023. Statista using Cosmetify data.





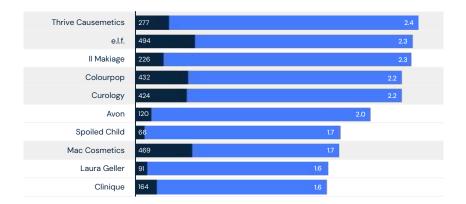
Despite having slightly lower numbers of followers compared to cosmetics brands, skincare brands still attract an impressive amount of hashtag views: CeraVe dominates the ranking with 8.8 billion hashtag views.

What players are dominating the US Skincare & Cosmetics industries?



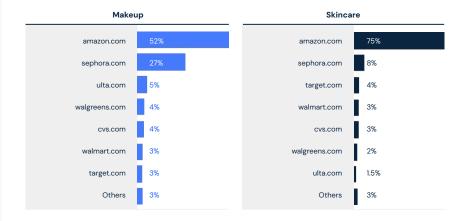
Top Beauty D2C Brands in Monthly Visits, Ranked by Branded Search Volume US, Apr - Sep 2023, Similarweb Research Intelligence





Thrive Cosmetics might be the most popular D2C Beauty site in traffic, but not in terms of brand awareness: Elf Cosmetics, Colourpop, Curology, and Mac Cosmetics are searched much more frequently despite ranking lower in monthly visits.

Top Beauty Retailers in Share of Unique Purchases for TikTok-Famous Brands* US, Jan 1 - Sep 30, 2023, Similarweb Retail Analytics



TikTok and Amazon are closely interconnected, with the marketplace grabbing over 75% share of TikTok-famous skincare brand purchases and about 52% of makeup brands. Therefore, brands, including the more premium ones, should implement a solid strategy to stand out in the Amazon marketplace.

What players are dominating the UK Skincare & Cosmetics industries?

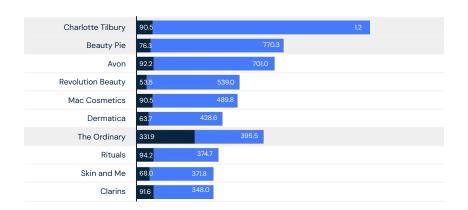
brand awareness



Top Beauty D2C Brands in Monthly Visits, Ranked by Branded Search Volume UK, Apr - Sep 2023, Similarweb Research Intelligence

Branded search volume in thousands Avg Monthly Visits in millions





The UK market is more closely aligned with TikTok on the biggest D2C brands in traffic: Charlotte Tilbury is easily the most popular D2C brand site, garnering 56% more views than its leading competitor, Beauty Pie, while The Ordinary is the biggest brand in search volume.

Top Beauty Retailers in Share of Unique Purchases for TikTok-Famous Brands* UK, Jan 1 - Sep 30, 2023, Similarweb Retail Analytics

*For 92 brands and 13 retailers

Makeup		Skincare	
amazon.co.uk	42%	amazon.co.uk	84%
sephora.co.uk	16%	sephora.co.uk	3%
boots.com	10%	sephora.co.uk	3/6
lookfantastic.com	10%	ebay.co.uk	3%
ebay.co.uk	10%	tesco.com	3%
johnlewis.com	7%		
cultbeauty.co.uk	2%	johnlewis.com	1%
Others	3%	Others	5%

Amazon.co.uk is the top shopping destination for TikTok-famous Beauty brand purchases, especially for skincare, which owns an 84% share in unique purchases. Makeup purchases have a more significant split between retailers, with Sephora.co.uk grabbing a 16% share, followed by the pharmacy Boots.

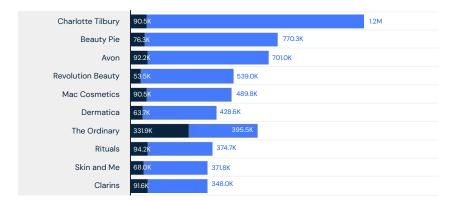
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*For 92 brands and 13 retailers

Make	eup	Skinca	re
amazon.co.uk	42%	amazon.co.uk	84%
sephora.co.uk	16%	sephora.co.uk	3%
boots.com	10%	·	i
lookfantastic.com	10%	ebay.co.uk	3%
ebay.co.uk	10%	tesco.com	3%
johnlewis.com cultbeauty.co.uk	7%	johnlewis.com	1%
Others	3%	Others	5%
			•

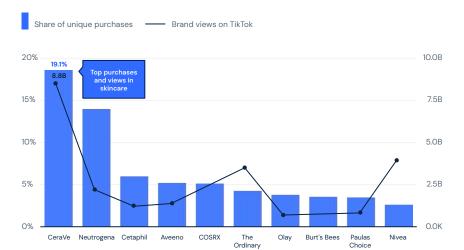
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Do these TikTok views translate into sales for Beauty brands?



Top Skincare Brands in Estimated Unique Purchases*

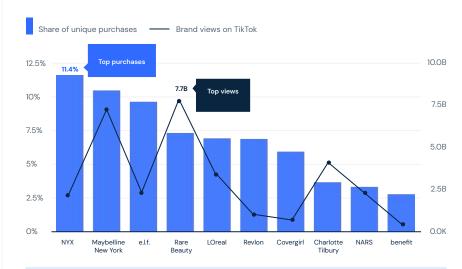
US, January - September 2023, based on 12 top Retailers and 89 brands (Sources: Similarweb Retail Analytics, Cosmetify, TikTok)



CeraVe is the top brand in TikTok views and share of purchases in the skincare category, a success brought about by partnering with skincare influencers early on. Some of its products sell out after waves of viral videos, establishing its authority in the segment.

Top Cosmetics Brands in Estimated Unique Purchases*

US, January - September 2023, based on 14 Retailers and 79 brands (Sources: Similarweb Retail Analytics, Cosmetify, TikTok)



It's not surprising that the most purchased makeup brands in the US all exhibit a high volume of views on TikTok. However, some TikTok favorites are missing in the top 10, such as Huda Beauty. The three best-selling brands are among the most affordable, suggesting that consumers are price-sensitive.

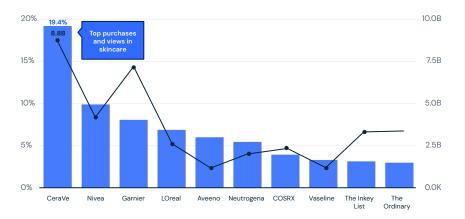
Do these TikTok views translate into sales for Beauty brands?



Top Skincare Brands in Estimated Unique Purchases

UK, January - September 2023, based on 13 top Retailers and 84 brands (Sources: Similarweb Retail Analytics, Cosmetify, TikTok)



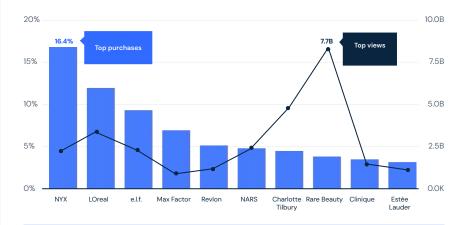


UK skincare purchasers seem very price-driven, with all top 10 skincare brands falling in the affordable range. Moreover, there is a strong alignment with TikTok's favorite brands, with most ranking in the top 10 in user views.

Top Cosmetics Brands in Estimated Unique Purchases

UK, January - September 2023, based on 12 top Retailers and 76 brands (Sources: Similarweb Retail Analytics, Cosmetify, TikTok)



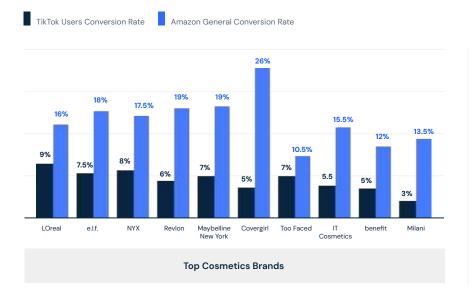


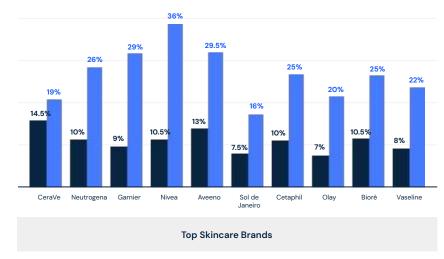
Even if some brands are more popular on TikTok, affordable drugstore makeup brands still capture a higher percentage of purchases than the trendy Fenty Beauty or Kylie Cosmetics.

TikTok users are pickier than the general population when buying Beauty products on Amazon

Cosmetics and Skincare Brands TikTok Users Buy on Amazon

US, TikTok users sample searches within the Beauty category of Amazon.com, July-September 2023, Similarweb Market Research panel, n=21,335





The top cosmetics and skincare brands purchased by TikTok users show a wide discrepancy in conversion rates compared to the general population. Because makeup experts on TikTok compare many brands, users are more likely to use Amazon as a search engine to browse, which explains the lower conversion rates on their favorite brands.

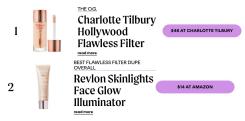
Looking forward: The dupes trend

TikTok is an excellent asset for Beauty brands, particularly for new ones, as it provides them with the opportunity to shine and grow quickly through paid partnerships and organic customer advocacy.

However, it can also be a trap for established brands. As seen in this report, pricier brands may shine on TikTok, but these views may not translate into sales, enabling consumers to search for "dupes" of these products or cheap knockoffs. With the rising inflation of the last two years, consumers across the globe are open to hacks and want to compromise on the price rather than on quality.

Premium brands with excellent brand awareness, such as Charlotte Tilbury or Drunk Elephant, are very exposed to this phenomenon, appearing in the top searches worldwide for dupes.

#	Keywords (1,365)	Volume ↓
1	charlotte tilbury flawless filter dupes 72.5M vues	6,940
2	drunk elephant bronzing drops dupe	4,940
3	charlotte tilbury contour wand dupe	4,470
4	charlotte tilbury pillow talk dupe	4,060
5	elf charlotte tilbury dupe	3,780
6	glossier you dupe	2,680
7	charlotte tilbury dupe	2,500
8	laneige lip mask dupe	2,140
9	charlotte tilbury dupes	2,120
10	skinceuticals c e ferulic dupe	1,550





Methodology | Similarweb

Brands Covered - US

Aveeno-Avon-BareMinerals-benefit-Bioré-Biossance-Biotherm Homme-Bobbi Brown-Brickell-Bulldog-Burt's Bees-Caudalie-CeraVe-Cetaphil-Charlotte Tilbury-Clarins-Clearasil-Clinique-ColourPop Cosmetics -COSRX -Covergirl-delilah-Differin-Drunk Elephant-e.l.f.-Estée Lauder-Fresh-Garnier-Glossier-Glow Recipe-Herbivore Botanicals-Honest Beauty-Huda Beauty-Ilia-Isana-IT Cosmetics-Juice Beauty-Kiehls-Kora Organics-Kosas-Kylie Cosmetics-La Mer-La Roche Posay-Lancome-LANEIGE-Liz Earle-LOreal-LOreal Men Expert-Lush-M.A.C.-Mario Badescu-Max Factor-Maybelline New York-Milani-Milk Makeup- Morphe-NARS-Neutrogena-Nivea-Nivea Men-No7-Noxzema-NYX-Olay-PAI-Paula's Choice-Pixi Beauty-Pley Beauty-Rare Beauty-Ren Clean Skincare-Revlon-RMS Beauty-Skinceuticals-Sol de Janeiro-Tarte Cosmetics-Tata Harper-The Body Shop-The Inkey List-The Ordinary-Too Faced-Tower 28-Urban Decay-Vaseline-Vichy-Victoria Beckham Beauty-Weleda-Well People-Youth to the People-Youthforia

Retailers Covered - US Skincare and Makeup categories only

Amazon.com-costco.com-cvs.com-ebay.com-kohls.com-neimanmarcus.com-net-a-p orter.com-saksfifthavenue.com-sephora.com-target.com-ulta.comwalgreens.com-walmart.com

Brands Covered - UK

Anastasia Beverly Hills-Aveeno-Avon-Awake organic-BareMinerals-benefit-Bioré-Biossance-Biotherm Homme-Bobbi Brown-Brickell-Bulldog-Burt's Bees- Burt's Bees-Caudalie-CeraVe-Cetaphil-Charlotte Tilbury-Clarins-Clearasil-Clinique-Clinique FOR MEN-COSRX-Covergirl-delilah-Differin-Drunk Elephant-e.l.f.-Estée Lauder-Evolve Beauty-Fresh-Garnier-Glossier-Glow Recipe-Honest Beauty-Huda Beauty-Ilia-IT Cosmetics-Juice Beauty-Kiehls-Kora Organics-Kosas-Kylie Cosmetics-La Mer-La Roche Posav-Lancome-LANEIGE-Liz Earle-LOreal-LOreal Men Expert-Lush-M.A.C.-Mario Badescu-Max Factor- Maybelline New York-Merit Beauty-Milani-Milk Makeup-Morphe-NARS-Neutrogena-Nivea-Nivea Men-No7-Noxzema-NYX-Olay-PAI-Paula's Choice-Pixi Beauty-Rare Beauty-Ren Clean Skincare-Revlon-RMS Beauty-Skinceuticals-Sol de Janeiro-Tata Harper-The Body Shop-The Inkey List-The Ordinary-Too Faced-Tower 28-Urban Decay-Vaseline-Vichy-Victoria Beckham Beauty-Weleda-Youth to the People-Youthforia-

Retailers Covered - UK Skincare and Makeup categories only

Amazon.co.uk-asda.com-boots.com-cultbeauty.co.uk-ebay.co.uk-feelunique.com-johnl ewis.com-lookfantastic.com-ocado.com-selfridges.com-sephora.co.uk- tesco.com

Glossary

Metrics

Daily Active Users:

Averaged number of daily active app users on an Android given app

Branded Search Volume:

Volume of search keywords that include the brand name

Unique purchases:

Total number of unique purchase events estimated by product

TikTok User Conversion Rate:

Number of purchases made by TikTok users for a specific brand, divided by the total number of views generated for that brand by TikTok users, all within the Beauty & Personal Care Category of amazon.com

Amazon General Conversion Rate:

Average Conversion Rate for the brand within the Beauty & Personal Care category for all users of amazon.com

Social media users:

Use any social media platform regularly

Social media purchasers:

Made an online purchase via a social media platform

Active social media purchasers:

Made an online purchase via a social media platform and will continue doing so

TikTok users:

Regularly use TikTok

TikTok purchasers:

Made an online purchase via TikTok in the past 12 months

About the authors



Koen van Gelder Team Lead Ecommerce at Statista

Koen leads the ecommerce research team at Statista, which develops highly relevant insights into the latest trends in the ecommerce industry. They work on statistics, data reports, and editorial reports on all aspects of online retail.

He previously worked as a researcher for the Consumer Goods team at Statista, where he focused on the latest trends and technologies in the retail market.



Inès Durand Senior Insights Manager at Similarweb

Inès is a Senior Market Insights Manager at Similarweb specializing in Retail, CPG & Financial Services. She uses industry analysis to distribute cutting-edge and actionable market research insights through Similarweb marketing, PR, and GTM teams. Her previous experience includes Strategy and M&A analysis, and her work has been featured in Retail Today, CNBC & AFP.

About the team

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