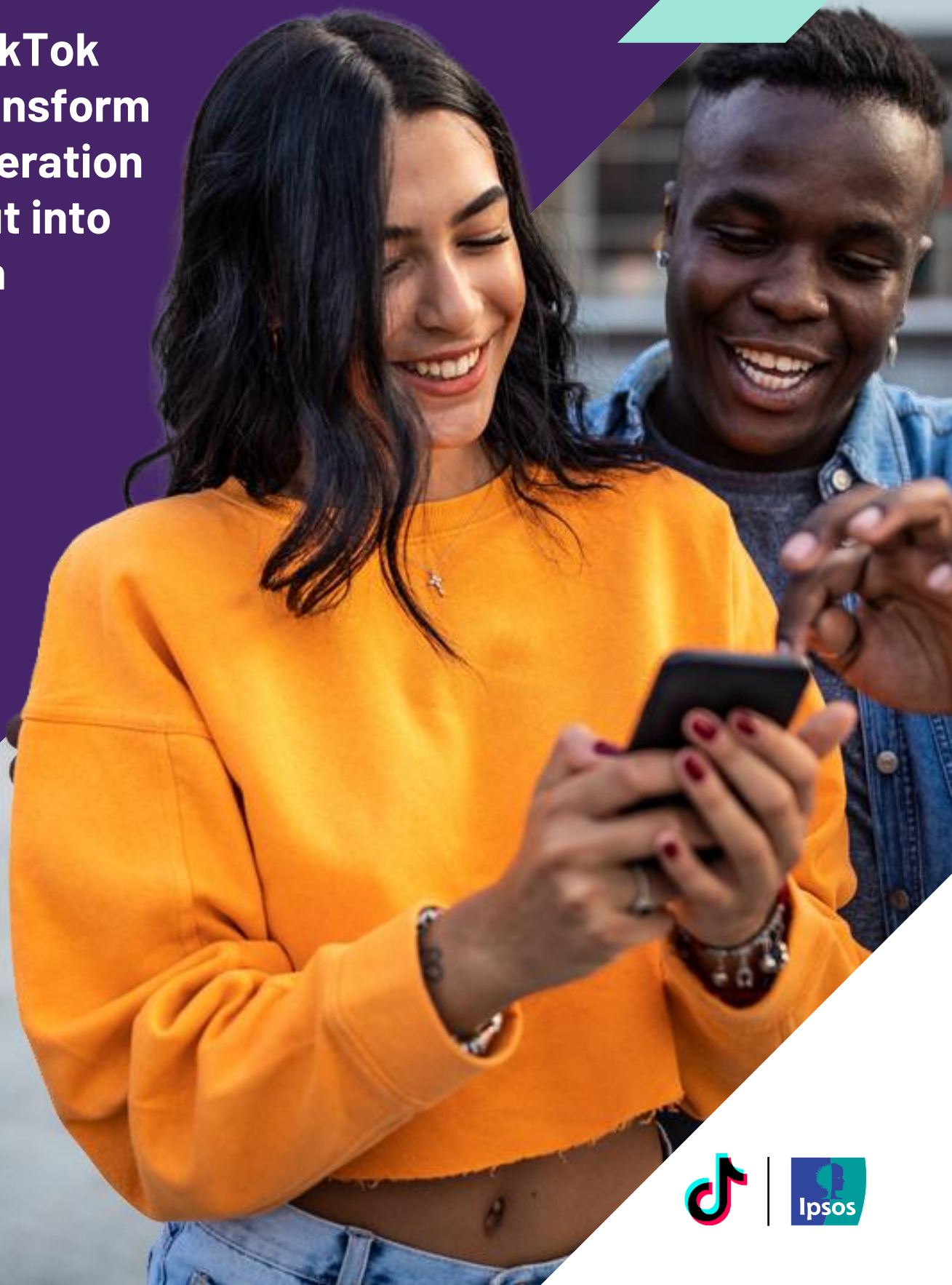


RE-ENERGISING THE MID-FUNNEL

How TikTok
can transform
consideration
burnout into
growth





THE CHALLENGE

A lack of 'joy' and 'progress' is causing mid-funnel burnout

Growth today is increasingly lost in the middle of the consumer journey. Decisions are taking more time and effort, as consumers are increasingly overwhelmed by the sheer volume of choice. The impact here is stark; journeys are burning out.

This is set against the backdrop of a global affordability crisis compounding buyer hesitation. Economic realities mean consumers are shifting from impulsive "buy now" behaviours to a disciplined "wait and be sure" mindset. They need more support than ever to build confidence when making purchase decisions.

Our research shows that this decision paralysis is particularly acute in the mid-funnel. There is a 'hesitation gap' here – and it is a significant blocker to business growth. **When consideration outweighs the sense of progress and joy in the purchase experience, journeys don't just slow down – they stall, reset, or are abandoned entirely.**

I looked through so much stuff that I started feeling frustrated and overwhelmed, and then thought, you know what, I can't do this right now."

UK, Female, 58.

74%



of consumers abandoned their shopping baskets in the last three months¹

This paper tackles the problem of consideration burnout head-on, asking:

What opportunities are there to re-energise journeys and keep up purchase momentum?

It provides guidance on how the new breed of 'always on' touchpoints have changed the landscape, and the opportunities this presents. In particular, we will outline how TikTok is uniquely positioned to navigate the tangled pathways of the mid-funnel and turn consideration burnout into growth.

(1) Accenture Consumer Pulse Research, 2024 <https://www.accenture.com/content/dam/accenture/final/accenture-com/document-2/Accenture-The-Empowered-Consumer.pdf#zoom=40>



OUR GOAL:

Uncovering strategies for
tackling consideration
burnout



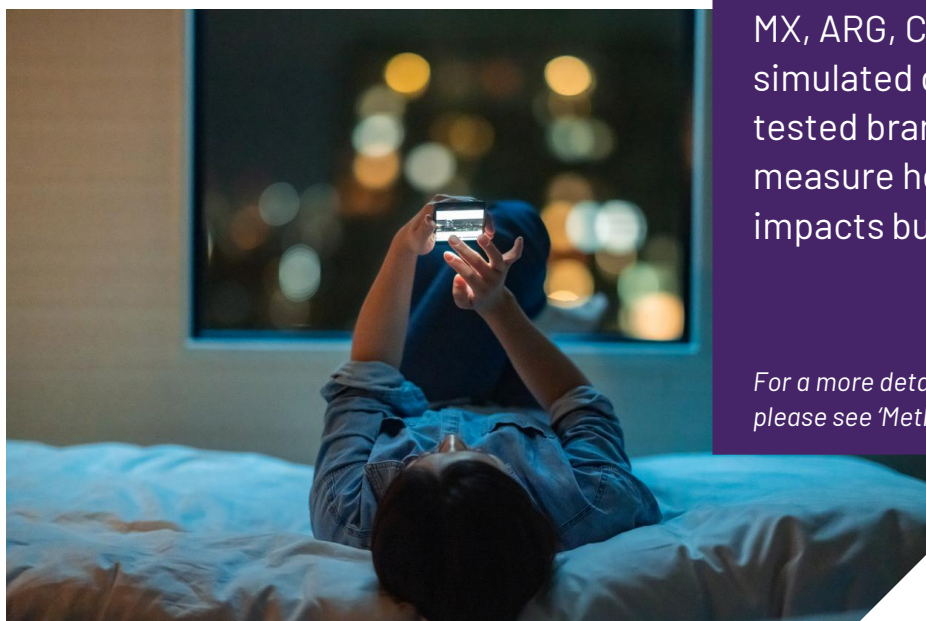
Method

Our research aimed to understand consumers' mindsets in today's journeys.

To do this we delivered a multi-stranded methodology, identifying the drivers and barriers to purchase consideration, and examining TikTok's role in this.

We explored the nuances of where journeys speed up and slow down, where connections happen and where they get lost, and most importantly, the opportunities TikTok offers to help journeys gain momentum, confidence and positive outcomes.

These findings can help brands understand where TikTok can add value in the mid-funnel and find and reach users at the right moment with the right content.



Digital Community & Depth Interviews:

A one-week immersion with 60 active buyers across the US, UK, BR, KSA, and TUR. Participants utilised buying diaries to document digital touchpoints throughout their journey, followed by 1-on-1 interviews to deep-dive into specific purchase behaviours.

Passive Behavioural Tracking:

Real-world tracking of actual digital movements for 10,000 users in the UK and 3,000 users in the US. This measured "next steps" following platform sessions – such as off-platform search and retail visits – to compare the residual impact of TikTok.

Online Survey:

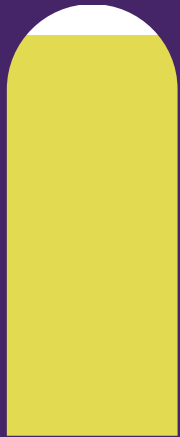
A 15-minute representative survey of 9,000 social media users across 12 markets (US, UK, DE, FR, IT, SP, BR, MX, ARG, COL, KSA, TUR). Using simulated digital environments, we tested brand content on TikTok to measure how platform context impacts buyer sentiment and intent.

For a more detailed methodological breakdown, please see 'Methodology' page.

THE OPPORTUNITY

Activating "Joyful Utility"
reinvigorates journeys in the
middle of the funnel





93%

of daily TikTok users would use TikTok as a research platform prior to purchasing



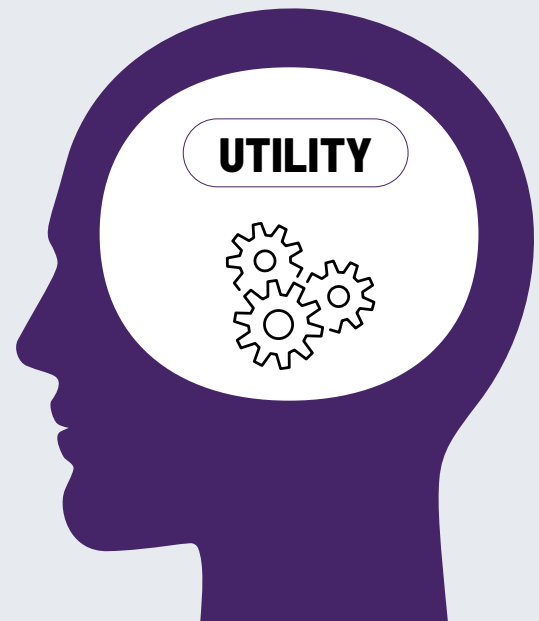
+45%

TikTok daily users are more likely to use TikTok to engage with brands or retailers vs. non-daily TikTok users*

We uncovered how users' experiences of TikTok can provide relief from consideration burnout. **We call this "Joyful Utility": A framework for brands to overcome mid-funnel stalling.** This is based on two main pillars:



The entertaining and community-powered backbone that engages, energises and has the power to spark mid-journeys to life.



The responsive engine that surfaces trusted relevance. It instils confidence in users to discover, evaluate and progress.

Joyful

On the one hand, TikTok puts users in a positive mindset, creating a joyful halo effect for brands.

+47%

TikTok daily users are more likely to use TikTok to engage with brands or retailers vs. non-daily TikTok users*

I'm already in a good mood. It's feel-good vibes, I'm learning, I'm laughing, I'm being shocked, all these emotions are stirring, and then it's like... 'oh, what a cool shirt'."

US, Male, 47.



Utility



On the other hand, TikTok is an ecosystem rich in utility, capable of supporting buyers across a full spectrum of journey needs.

RELEVANT



+43%

TikTok daily users are more likely to use TikTok to engage with brands or retailers vs. non-daily TikTok users*



USEFUL



+43%

TikTok daily users are more likely to say advertisements on TikTok are "useful" vs. non-daily TikTok users*

[TikTok] just has all the input I need, I found new recommendations, a deep review of a hotel I was considering, people in comments agreeing and disagreeing and a cheap place to book."

KSA, Female, 38



The synergy of “Joyful Utility” creates a powerful halo effect that fundamentally elevates brand standing. On TikTok, advertising functions as a native extension of the environment rather than an external disruption, allowing the platform’s inherent creativity and energy to transfer directly to the brands within its ecosystem.

This high-positivity environment fosters a unique perceptual alignment, where brands are viewed as authentic contributors to the user experience. By participating in this space, advertisers see a measurable strengthening of their own equity and a foundation of trust that resonates long after the initial exposure.

Importantly, TikTok acts as a **catalyst in critical decision-making moments**, effectively bridging the gap between initial intent and final confidence. Participants who were shown a sponsored ad on TikTok were 22% more likely to move the brand into their “top choice” or “serious consideration”.

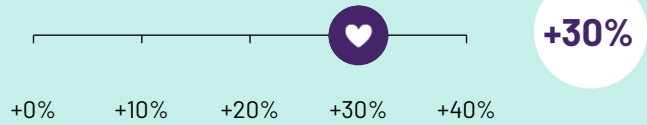
+22%

more likely compared to those not exposed.*

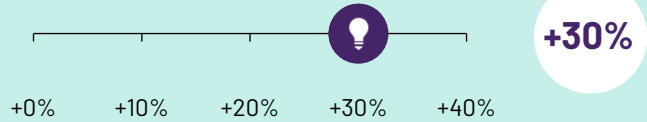
Brand sentiment uplift

Sponsored brands on TikTok were perceived as being more...

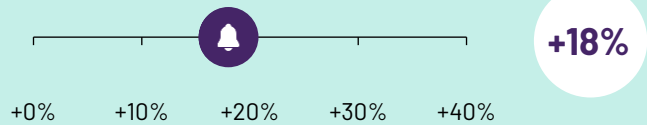
Authentic



Innovative



In touch with what’s happening



Trustworthy



*(Uplift amongst those exposed to a sponsored ad on TikTok vs. those non-exposed)**

Ultimately, “Joyful Utility” does more than inform – it accelerates the entire consideration phase. By merging entertainment with information, TikTok reduces the distance between discovery and action. This velocity is driven by active engagement:

Exposure to sponsored ads

LEARN MORE



72%

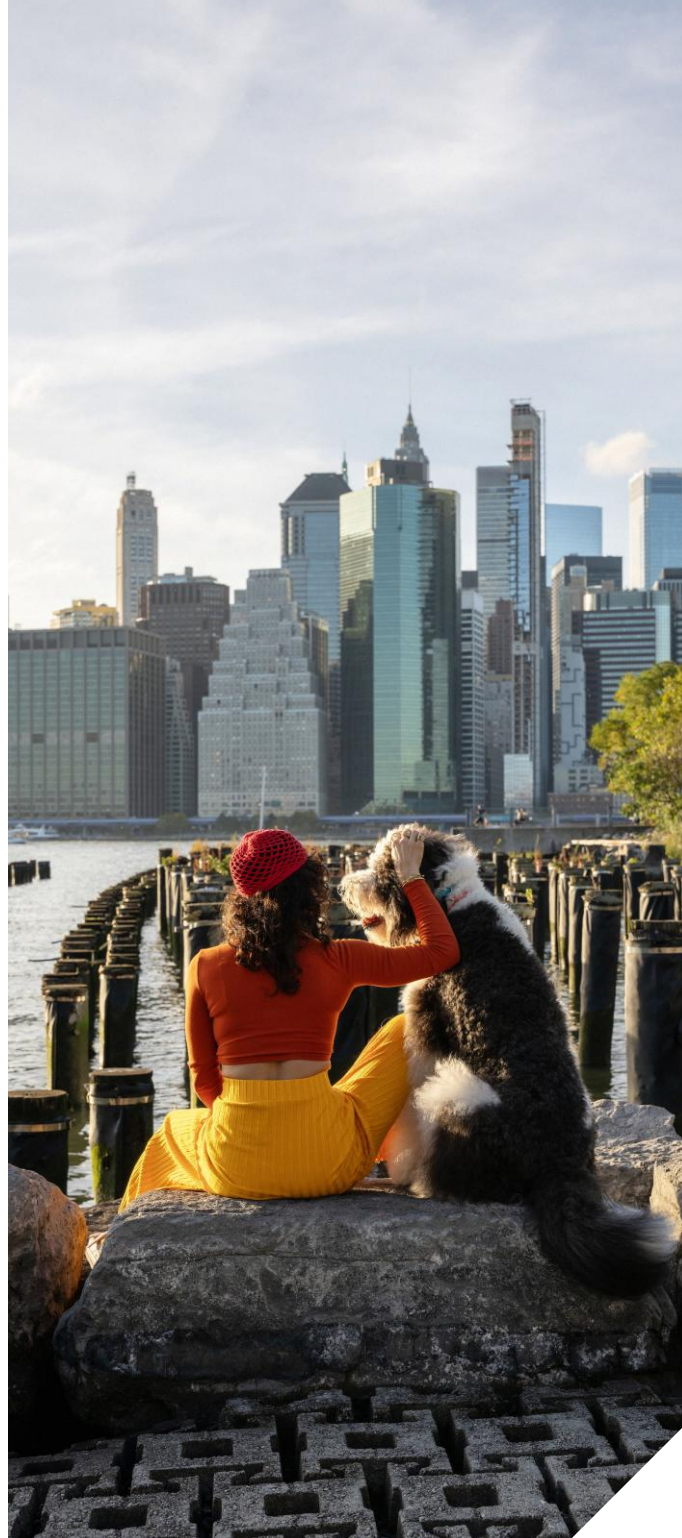
Daily TikTok users exposed to a sponsored ad said it makes them want to learn more about the brand

BUY NOW



68%

Daily TikTok users exposed to a sponsored ad said it made them want to “buy this brand right now”





Four Facets of Joyful Utility

There are four facets of TikTok's experience that generate Joyful Utility and have the potential to re-energise the mid-funnel for brands:

Trusted Discovery:

FROM "Sifting through generic content"



TO "Trusted discovery that matches intent".

Consideration Curation:

FROM "Lost progress"



TO "Saving, nudging, and searching."

Actionable Aspiration

FROM "The next steps are unclear"



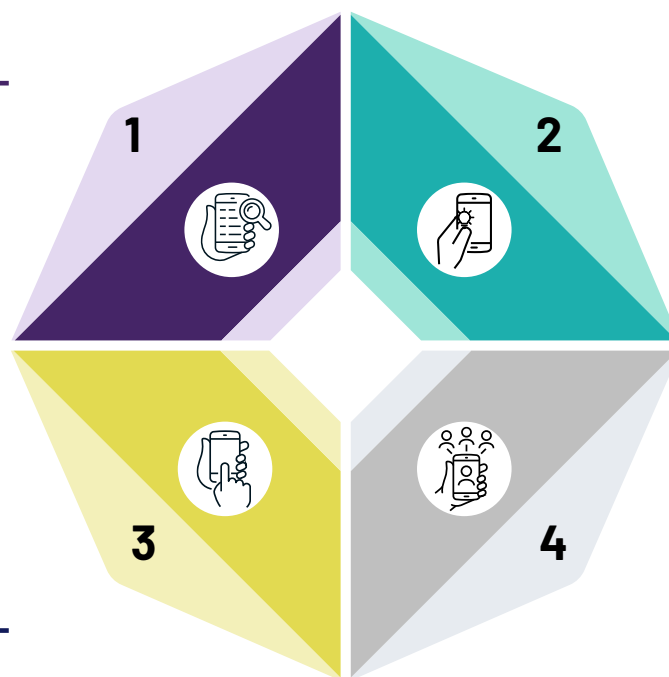
TO "Engaging content that inspires action".

Peer-Powered Proof:

FROM: "Isolated decision-making"



TO "Shared and supported journeys"



1 Trusted Discovery



FROM “Sifting through generic content” TO “Trusted discovery that matches intent”

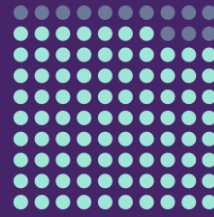
Traditional “consideration” forces shoppers to engage in high-effort, manual discovery. Sifting through generic and irrelevant content can lead consumers to burn out in the mid-funnel.



When we started looking, there were hundreds of hotels, in like two to three different neighbourhoods but we didn't know the city at all, and it became a bit much, so we stopped looking for a day or two”

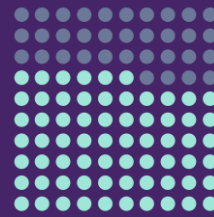
Italy, Male, 20

In contrast, shoppers trust TikTok to surface **relevant content that matches their intent**. This means consumers trust the platform to both reaffirm established thinking and introduce unexpected impulses.



87%

of daily TikTok users agree that it “helps them discover new things they like”



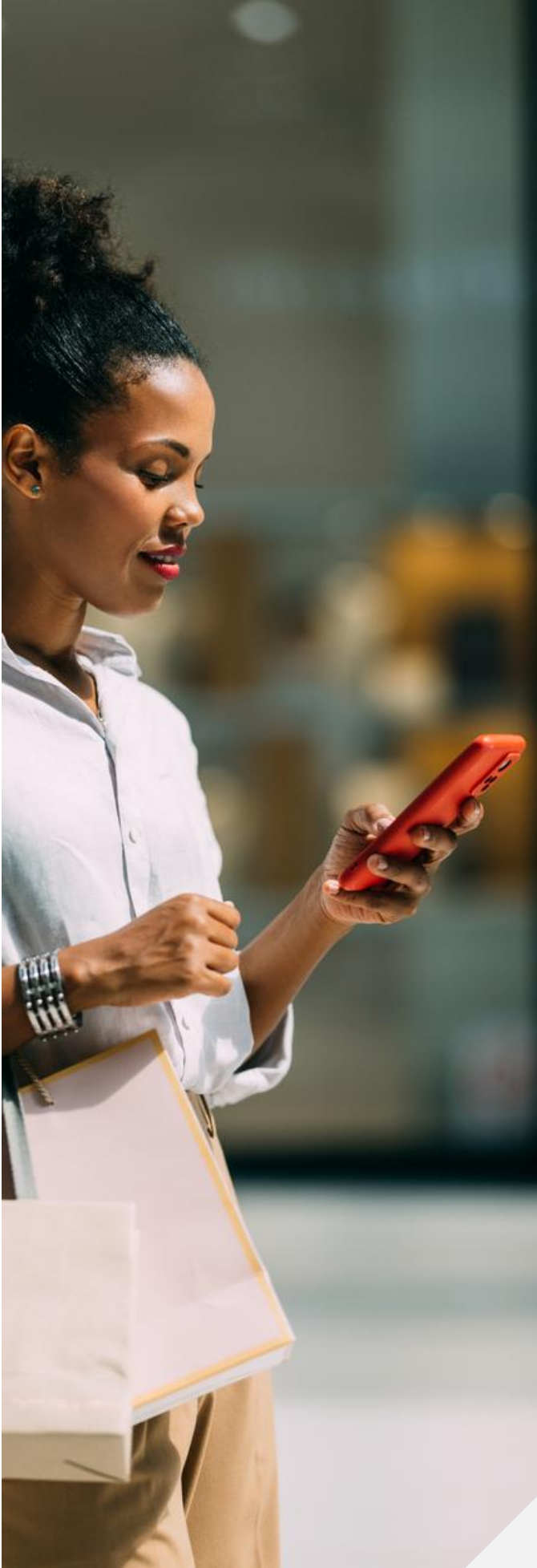
66%

of daily TikTok users agree that the ads on TikTok are relevant to their interests



TikTok has opened up my perspective to trying very different jackets, rather than just sticking with what I know.”

UK, Male, 38



The Discovery Boost:

There is a significant opportunity for brands to be discovered on the platform as this “discovery boost” holds true across a wide range of product categories. For fashion and travel in particular TikTok has the power to take people out of their comfort zones and off the beaten path. This means there is potential for brands in these categories to enter the consideration set seamlessly on the platform. And this “Discovery Boost” extends off platform too.



While I confirmed a lot of the big attractions on TikTok, I also came across a video without many views that showed things I'd never seen and that felt like a great find.”

Brazil, Female, 30

2 Actionable Aspiration



FROM “The next steps are unclear” TO “Content that inspires action”

Consideration often stalls when next steps aren't clear or too difficult and the gap between inspiration and action feels too wide. TikTok bridges these gaps by blending entertainment with educational content, driving momentum and translating passive inspiration into action.



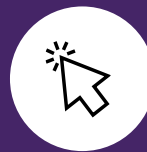
When we started looking, there were hundreds of hotels, in like two to three different neighbourhoods but we didn't know the city at all, and it became a bit much, so we stopped looking for a day or two”

Italy, Male, 20

72%

Daily TikTok users exposed to a sponsored ad said it makes them want to learn more about the brand

The platform ensures the journey remains a continuous, informed flow rather than a series of disconnected hurdles by providing relevant utility across the entire breadth of the journey:



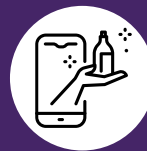
Activation:

Engaging, relatable content re-activates disengaged users and sparks initial interest.



Initial Consideration:

Bite-sized and low-friction value content, making new ideas immediately accessible and relatable.



Detailed Evaluation:

Longer-form, detailed content provides the technical depth, credible demonstrations, and assurance.



93%

of daily TikTok users would take an action after seeing the ad on TikTok (e.g., search on/off platform, save, read comments, click a link, share)

Accelerated Flow that Drives Intent:

By balancing inspiration with personal utility, TikTok compresses traditional timelines. It turns a fragmented path into an accelerated flow that keeps users moving forward toward a final decision. For brands, this continuous flow means that inspiration is converted into high-intent, with measurable next steps and actions, such as searching or saving.

3 Consideration Curation



FROM “Lost progress” TO “Saving, nudging, and searching”

When consideration stalls, shoppers lose the thread of original intent and progress they’ve made, making it harder to rebuild momentum, potentially leading to loss of opportunities for brands.

On TikTok, moving from discovery to active decision-making is a natural extension of platform behaviour. Users intuitively harness native behaviours, saving, searching, sharing and deliberate interaction, as ingrained ways to maintain momentum and progress their journey.

Users curate content to match their needs by nudging their feed to kickstart consideration and start immersion.



When I start looking for something and I see something interesting and useful [on TikTok], I will always ‘like’ it, because I think that’ll help bring up similarly useful stuff. It’s also a bit of sign that I’m getting serious, as I’m inviting more information into my life.”

UK, 34, Female

On-platform search helps users move from broad interest to targeted evaluation without leaving the experience. Users ‘save’ content ‘collections’ to mark impactful moments and track consideration progress in real-time.



Daily TikTok users are

+43%

more likely to “save posts/videos for later” vs. non-daily TikTok users*



Brands are remembered

By balancing inspiration with personal utility, TikTok compresses traditional timelines. It turns a fragmented path into an accelerated flow that keeps users moving forward toward a final decision. For brands, this continuous flow means that inspiration is converted into high-intent, with measurable next steps and actions, such as searching or saving.



“Yes, I use everything I can, I save interesting posts in groups, I ‘like’ content I want to see more of and I share with my friends - it helps me keep track.”

Turkey, Female, 30

4 Peer-powered proof

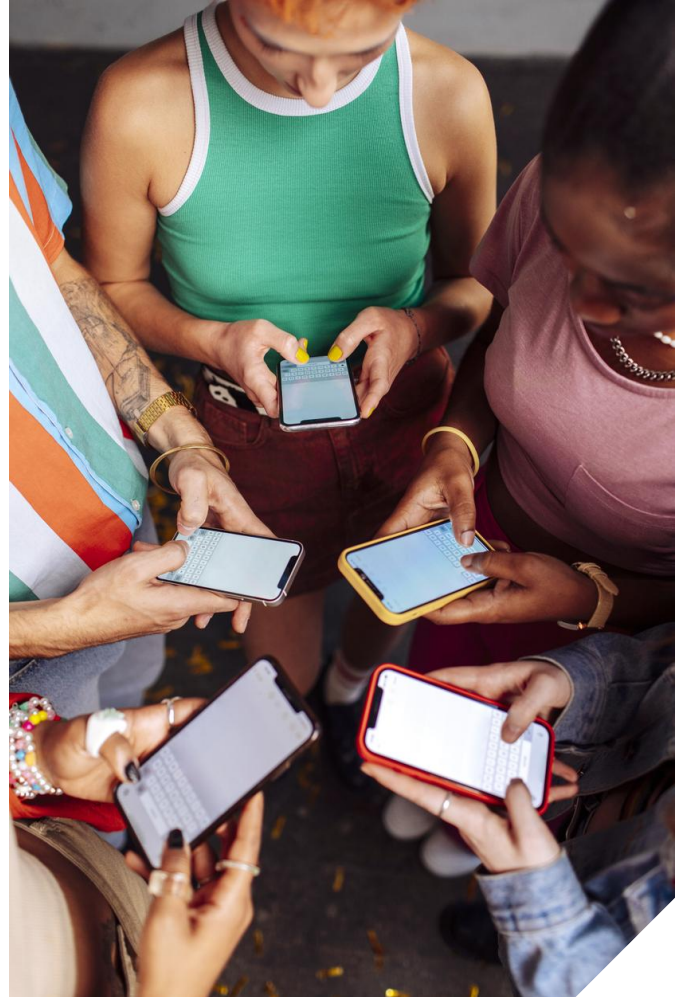


FROM: "Isolated decision-making" TO "Shared and supported journeys"

There is lingering scepticism users feel when they lack proof that a product/service lives up to its claims. Without an accessible, high-trust community vetting, the path to purchase feels high-risk and isolated, causing users to stall before taking the final step.

TikTok bridges this gap by facilitating a fluid sense of community where users are effortlessly absorbed into shared journeys. Unlike active, opt-in structures, these communities form subconsciously around interests and recommendations, making high-trust validation passively accessible rather than something that must be actively sought out.

TikTok doesn't only help to find relevant content, it also helps to find a group of people on a similar journey, as well as trusted experts and taste makers, turning a solo purchase into a shared journey, making the process feel supported and natural without any extra effort.



I recently bought a lip balm from NYX, I watched 20 or so videos of people like me trying it on—what really helped is that I could find girls with different skin tones to try and match my own. I think that was the last thing I checked before buying it."

KSA, Female, 27

Comment sections open portals to pop-up communities creating space for education, discussion and validation and these conversations help qualify and evaluate content, guiding trust and quality perceptions. Users also share content with their inner-circle and co-decision-makers to validate and push forward decisions.



I'll share TikTok videos with my girlfriend of sharing clothes I'm looking at to see what she thinks and then sometimes she'll send me stuff she likes."

UK, Male, 38

Validation propels brands towards final decision:

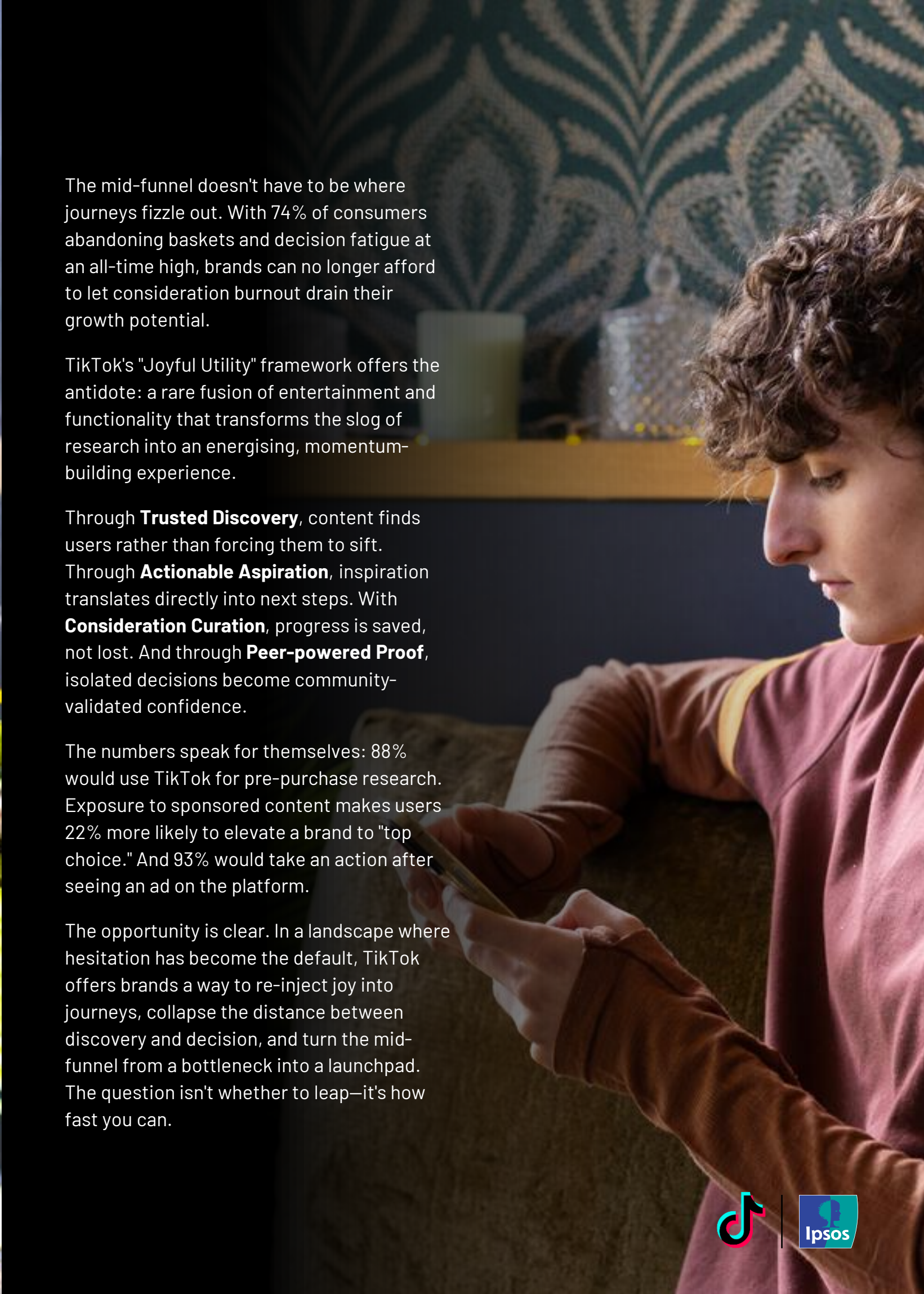
For brands, this community-led validation supports in removing risk from the final decision. By allowing the community to validate claims and quality, TikTok builds the collective trust needed to turn a hesitant browser into a confident buyer.



CONCLUSION

Leap Past Hesitation,
Land on Growth





The mid-funnel doesn't have to be where journeys fizzle out. With 74% of consumers abandoning baskets and decision fatigue at an all-time high, brands can no longer afford to let consideration burnout drain their growth potential.

TikTok's "Joyful Utility" framework offers the antidote: a rare fusion of entertainment and functionality that transforms the slog of research into an energising, momentum-building experience.

Through **Trusted Discovery**, content finds users rather than forcing them to sift. Through **Actionable Aspiration**, inspiration translates directly into next steps. With **Consideration Curation**, progress is saved, not lost. And through **Peer-powered Proof**, isolated decisions become community-validated confidence.

The numbers speak for themselves: 88% would use TikTok for pre-purchase research. Exposure to sponsored content makes users 22% more likely to elevate a brand to "top choice." And 93% would take an action after seeing an ad on the platform.

The opportunity is clear. In a landscape where hesitation has become the default, TikTok offers brands a way to re-inject joy into journeys, collapse the distance between discovery and decision, and turn the mid-funnel from a bottleneck into a launchpad. The question isn't whether to leap—it's how fast you can.



Methodology

The research in this report was commissioned by TikTok and conducted by Ipsos across three distinct areas: Digital Community & Depth Interviews, Passive Behavioural Tracking and an Online Survey:

Digital Community & Depth Interviews:

The qualitative research conducted “Digital Shopping Diary” pre-tasks followed by one-on-one follow-up interviews (approximately 60 minutes each) with 60 daily TikTok users (30 mins per day each week), currently in ‘active consideration’ planning to make a purchase within a month across Travel, Beauty & Personal Care, Fashion & Apparel and Financial Services. Research was carried out with 10 participants across each the US, UK, Italy, Brazil, KSA and Turkey with half the sample representing 18-34s and the other half 35-55+. Fieldwork took place between 3rd of November 2025 and 21st of November 2025.

Passive Behavioural Tracking:

Passive behavioural tracking was conducted across two nationally representative panels of internet users aged 18+ (UK = c.10,000 ; US = c.3,000). Digital telemetry was used to generate a syndicated clickstream dataset that monitored real-world, digital behaviours. We looked at off-platform behaviours after a TikTok session – including retail visits and search engine queries – to quantify the residual impact of TikTok exposure. Data collection occurred between 1st April - 30th June 2025.

Online Survey:

The quantitative research consisted of a 15-minute online survey of a representative sample of 9,000 participants aged 18-65 in 12 markets across the world (USA, UK, Germany, France, Italy, Spain, Brazil, Mexico, Argentina, Colombia, KSA, and Turkey). Participants were screened to ensure they were social media users and non-rejectors of the selected buying categories (Travel, Beauty & Personal Care, Fashion & Apparel, Financial Services).

To measure “Environmental Impact,” the study employed a stimulus-led experimental structure using a test-and-control design. Participants in the test cell were exposed to

brand advertisements within a simulated TikTok environment, while those in the control cell were not shown any digital environment or brand exposure. By comparing the sentiment and behavioural intent of the test group against this unexposed baseline, the research isolated the specific uplift driven by the TikTok platform context. Fieldwork took place between 28th November 2025 and 6th February 2026.

All quantitative data was weighted by age, gender, region, work status and education to be nationally representative of each market’s general population. The total results presented in this report reflect the combined weighted proportions of all markets according to the original sample sizes. Statistical significance testing was applied to the data to identify meaningful differences between groups, where stated, with findings reported as significant where they meet the 95% confidence threshold. Unweighted base sizes are as follows:

- Total sample size: (n=9,000)
- Market sample sizes: USA (n=1,200), UK (n=1,200), Germany (n=1,200), France (n=600), Italy (n=600), Spain (n=600), Brazil (n=600), Mexico (n=600), Argentina (n=600), Colombia (n=600), KSA (n=600), and Turkey (n=600)
- TikTok usage: TikTok daily users (n=3,542), TikTok non-daily but monthly users (n=2,251)
- Cells: Those exposed to the TikTok simulated environment (n=3,176), Those not exposed to any simulated environment (n=2,956), Daily TikTok users exposed to the TikTok simulated environment (n=1,960)
- *Note: While the wider study included exposure to other digital environments, this report focuses specifically on the comparison between TikTok-exposed participants & the unexposed control group.*

Relative Uplift End Note:

Data points marked with an asterisk (*) denote relative uplift rather than absolute percentage point differences. Relative uplift is calculated as the percentage change in performance between a target audience or test group relative to its respective baseline. This identifies the proportional increase in sentiment or intent within specific segments or environments.

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

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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