

escalent



How TikTok Drives Modern Vehicle Buying

Why TikTok has become a go-to source for vehicle shoppers and how the platform can help auto brands drive sales





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Foreword

The TikTok Perspective



By Brian Torpey
Director, Product
Strategy &
Operations, TikTok

Vehicle shopping increasingly starts online, where short-form videos and communities help people see what fits their lives best. With more powertrains, features and price points to weigh, buyers are exploring more options and turning to voices they trust.

As economic turbulence affects the North American auto industry, TikTok partnered with Escalent to understand our unique role in the vehicle purchase journey. We also sought to understand our impact on driving confident purchase decisions among vehicle buyers.

This research shows that TikTok leads major social and digital platforms for early vehicle research and discovery. People come to TikTok for inspiration, side-by-side comparisons, and reviews and testimonials from creators, users and experts.

People look for quick, visual content that helps them picture vehicle ownership and for creators whose perspectives feel real and relatable. For automakers and dealers, that creates a valuable window—a chance to connect with people while they're still exploring, not just when they're ready to buy.





Foreword

The Escalent Perspective



By **K.C. Boyce**

Vice President,
Automotive &
Mobility, Escalent

The vehicle purchase journey has transformed dramatically in the past few years. Rising prices, the ongoing expansion of electrified powertrains and vehicle features, as well as changing policies and incentives are forcing buyers to navigate more information—and more uncertainty—than ever. At the same time, automakers and dealers are working to meet shifting expectations while keeping pace with unprecedented technological change.

In this environment, clear and credible guidance matters. Increasingly, car shoppers are turning to digital spaces where real owners, enthusiasts and experts bring vehicles to life. Car shoppers want to see how a vehicle fits into someone's day, *hear* what ownership actually feels like and *learn* from voices they view as authentic and unbiased.

Insights from our [independent EVForward® research program](#) into electric vehicle (EV) buyers and electrified powertrain adoption reinforce this shift. Across thousands of new-vehicle buyers, TikTok has emerged as one of the most widely used online platforms for dedicated automotive content. More than half of EV Owners and EV Intenders—new-car buyers who are more than 15 times more likely to purchase a battery electric vehicle (BEV) than an average new-car buyer, according to Escalent's research—say they

consume automotive content often or almost always on TikTok, the highest rate among all online platforms we've measured. These behaviors mirror a broader trend: vehicle shoppers are gravitating to spaces where information is fast, visual and grounded in real experience.

That's what makes the findings in this thought paper so valuable. The research we conducted with TikTok reveals just how early and influential this behavior has become. Shoppers are using the platform to explore vehicle brands and models they may not have considered, understand complex features and make sense of the growing electrified powertrain landscape. For automakers and dealers, this represents a pivotal opportunity. When inspiration and clarity happen early, consumers carry that confidence with them into every subsequent touchpoint—from search engines to OEM websites to dealerships.

Escalent's work—both independent and with TikTok—makes it clear that today's vehicle shoppers are hungry for guidance they trust. As the automotive landscape grows more complex, meeting them in the places where they already seek clarity will be essential to earning confidence, consideration and long-term loyalty.



Executive Summary

Buying a vehicle has never felt more complicated. With an abundance of models, powertrains, features and price points to weigh, shoppers want help making sense of it all.

TikTok has become a trusted partner in that process. Videos, creator reviews and authentic conversations make research easier, showing what a vehicle looks like in real life and what ownership might actually feel like.

And behind those moments of discovery is a growing body of evidence about how TikTok is impacting vehicle buying:

TikTok drives early vehicle discovery and research.

TikTok shoppers* use the platform to navigate through the tangled web of vehicle options available to them—75% through unintentional discovery and 80% in the subsequent research phase, the highest among online channels.

The platform opens doors to new brands and models.

81% of TikTok shoppers say the platform increased their interest in brands they were unaware of or had never considered, and 78% say it did the same for specific vehicle models.

Luxury and EV/hybrid interest remains strong.

Even with short-term market dips, curiosity about premium and eco-friendly models remains high, especially among TikTok's financially flexible audiences.



TikTok Shoppers* vs. **Non-TikTok Shoppers**
In this report, here's how we define these terms:

TikTok shoppers
Shoppers who used TikTok in their vehicle-buying process

Non-TikTok shoppers
Shoppers who did *not* use TikTok in their vehicle-buying process

[Note: Vehicle shoppers typically use multiple sources, whether they include TikTok or not.]



Executive Summary



#NewCar

Buyers value clarity around financing.

People value content that clearly spells out pricing and payment options, helping them feel informed and ready to buy.

Creators make expertise accessible.

TikTok shoppers say content creators are similarly useful and trusted—whether they are car enthusiasts, automotive experts, auto brands or everyday creators—turning specs and features into something shoppers can easily understand.

TikTok inspires next steps.

Most shoppers who start on TikTok also visit automaker sites, dealerships or search engines throughout their vehicle purchase journey, showing that TikTok sparks action across the entire funnel.

TikTok amplifies the impact of every other channel, helping brands turn discovery and research into deeper engagement, stronger brand preference and vehicle purchase decisions buyers feel good about.



A Shifting Market and a Smarter Shopper

Economic pressure is reshaping priorities but not slowing demand.

01





Economic pressure is reshaping priorities but not slowing demand.

Vehicle buyers are being more thoughtful about what they drive and why. Due to a variety of factors, consumers are weighing value more carefully. These include but aren't limited to economic uncertainty, market volatility and ever-increasing average new-vehicle prices, which [crested \\$50,000 in October 2025](#).¹ Consumers are considering how these pressures might continue to affect vehicle prices and whether to buy a new or used vehicle.

Tariff policy changes in the US have also impacted a plethora of consumer goods, including vehicles, causing prices to rise and consumers to shift their purchase timelines. For example, before the 2025 tariff increase, 37% of shoppers planned to buy a vehicle sooner to avoid tariff-related price increases, while 25% opted to wait longer.²

Additionally, the automotive market is increasingly complex. Buyers are hungry for vehicle information because there's so much more that needs to be understood to buy a vehicle today, from a growing range of electrified powertrain options to ever-evolving safety features and connected vehicle service offerings.

As a result of these colliding variables and more, the vehicle-buying journey is longer and more deliberate. Today's vehicle buyers move cautiously and repeatedly through the purchase journey—researching deeply, leaning on digital tools and tailoring decisions to their unique priorities, from innovation to reliability.

Yet vehicle shoppers, including TikTok's core audience, are still finding ways to balance wants and needs. The research shows that TikTok shoppers are curious, informed and open to a wide range of options across standard, luxury and eco-friendly vehicles.



Before the 2025 tariff increase

37% of shoppers planned to buy a vehicle sooner



25% opted to wait longer



“Today's vehicle buyers move cautiously and repeatedly through the purchase journey”

¹“Kelley Blue Book Report: New-Vehicle Average Transaction Price Hits Record High in September, Surges Past \$50,000 for the First Time Ever,” Kelley Blue Book, 2025.

²“Tariff Uncertainty Is Already Shaking Up Car Buying Decisions,” Edmunds, 2025.



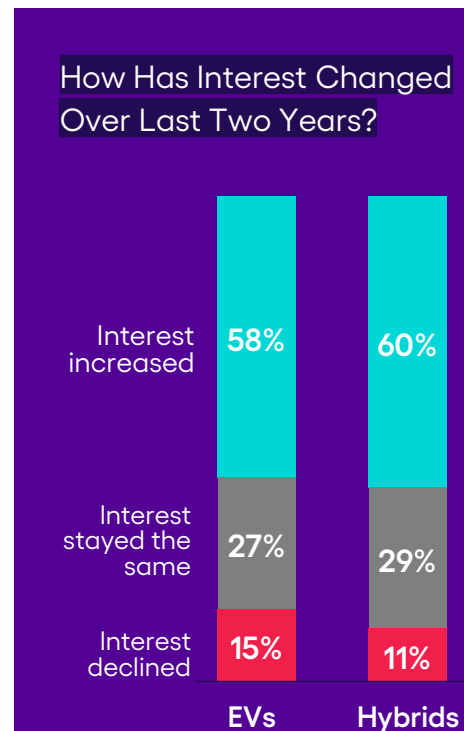
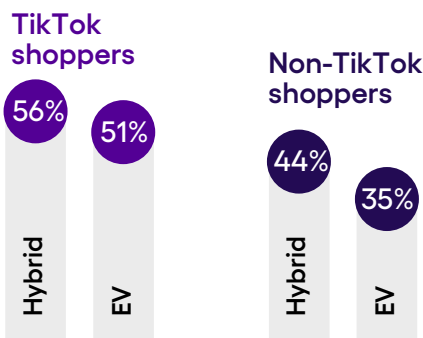
Hybrid demand rises as the electrified powertrain market grows more complex.

Consumer uncertainty around changes to EV incentives, public charging infrastructure funding and tariffs that would impact the automotive market caused some buyers to pull forward their vehicle purchases to the end of 2024 while others delayed. Although EV sales softened in early 2025, long-term demand for electrification remains strong, according to secondary research by Escalent.³ Mainstream shoppers, who are more pragmatic and risk-averse than early EV adopters, are [increasingly engaging with EVs](#).⁴ However, mainstream shoppers also have higher expectations and are less willing to compromise on finding the right vehicle.

While other vehicle shoppers are still hesitant to go all-electric due to concerns around cost, charge time, range and battery life, they can now choose between a growing range of hybrid EVs, plug-in hybrids and extended-range EVs. Many consider these electrified powertrains to be the [best of both worlds](#)⁵ because they give shoppers greater flexibility, as well as environmental and cost-saving benefits, without entirely giving up gas.

This growing electrified powertrain market is often messy and confusing for buyers. From model availability and pricing to understanding the pros and cons of each, the number of factors consumers have to consider can be overwhelming. This complexity extends the vehicle purchase process and drives buyers to seek more information.

We see these market realities reflected among TikTok shoppers, who have become more interested in EVs and hybrids over the past two years than non-TikTok shoppers. More than half of TikTok shoppers are considering a hybrid (56%) or EV (51%) compared with non-TikTok shoppers considering a hybrid (44%) or EV (35%).⁶



TikTok shoppers have a higher interest in EVs and hybrids

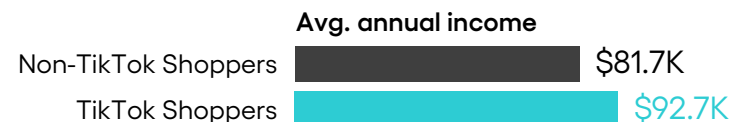
⁶ Source: TikTok Marketing Sciences US Navigating the New Auto Buying Journey Study, Escalent, 2025.

³ "US EV sales fluctuation and contributing factors," S&P Global, 2025; "Total vehicle sales in the US were analyzed to see the overall impact," FRED, 2025; "Electric Vehicle Sales and Market Share," CarEdge, 2025.
⁴ "BEV Adoption Has Reached the Early Majority. Are Automakers Ready?" Escalent, 2025.
⁵ "Finding the Right Fit for Alternative Powertrains on the Road to Full Electrification," Escalent, 2025.

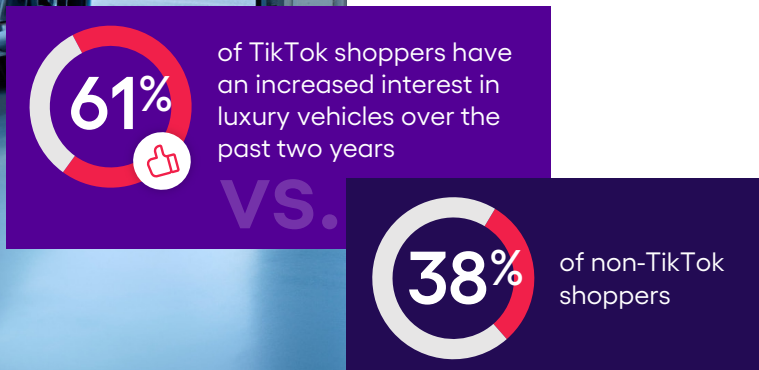
Luxury demand remains relevant among key audiences despite economic pressures.



Even in a tighter economy, luxury remains a goal for many TikTok shoppers, potentially due to more expendable income. According to Escalent research, TikTok shoppers earn an average of \$92.7K a year vs. \$81.7K for non-TikTok shoppers.



In addition, nearly half (49%) of TikTok shoppers surveyed describe themselves as vehicle enthusiasts. Because these shoppers tend to have greater financial flexibility, luxury vehicle brands have a strong opportunity to reach these enthusiasts on the platform.





Financing choices illustrate TikTok shoppers' optimism and confidence in tomorrow's economy.

As vehicle prices and long-term costs rise, shoppers are being more thoughtful and conscious about how they pay for vehicle purchases. Leasing interest has risen industry-wide, yet TikTok shoppers remain more likely to finance.

According to the research, 43% of TikTok shoppers prefer financing compared with 34% of non-TikTok shoppers. This suggests that TikTok shoppers feel optimistic about their financial stability and the lasting value of their purchase.



For automakers and dealers, this confidence provides an opportunity to be more transparent about financing and to emphasize long-term vehicle value. This helps buyers feel informed, rather than pressured, about payment choices. Together, these shifts reveal a more deliberate kind of vehicle buyer: one who considers their options carefully, turning to platforms like TikTok for trustworthy, genuine and easy-to-digest guidance.



TikTok's Role in the Vehicle-Buying Journey

The journey is longer, more deliberate and more digital than ever, with TikTok providing auto consumers a simplified path to discovering the vehicle that is right for them.

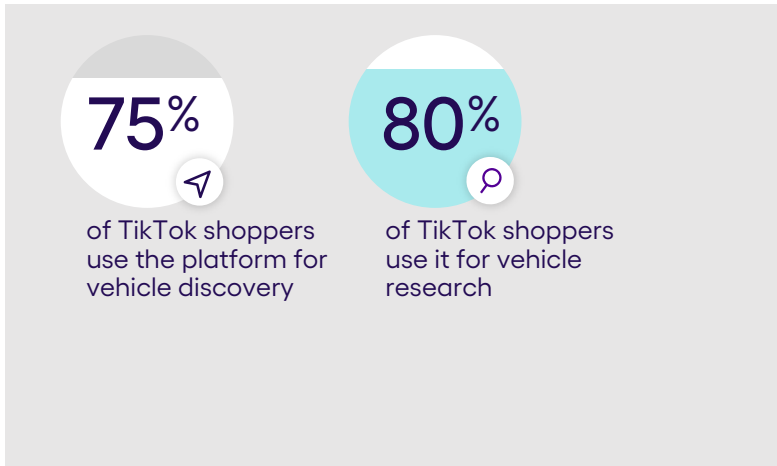




Research happens everywhere, but TikTok leads in discovery.

Consumers use an average of 3.9 online sources when researching a vehicle, most often turning to social and video platforms, manufacturer websites, online vehicle marketplaces, dealership sites and review sites.

TikTok shoppers dig even deeper—turning to 4.5 sources on average, compared with just 3.3 for non-TikTok shoppers, showing how curious and engaged the former are when exploring their vehicle options. Among social and video platforms, TikTok ranks highest for both discovery and research.



The findings show that TikTok plays a powerful role early in the vehicle-buying journey, sparking interest, shaping what people consider and giving people the clarity they need before they turn to other sources for final decisions.



TikTok's Influence on Vehicle Shopping



What TikTok shoppers search for most.

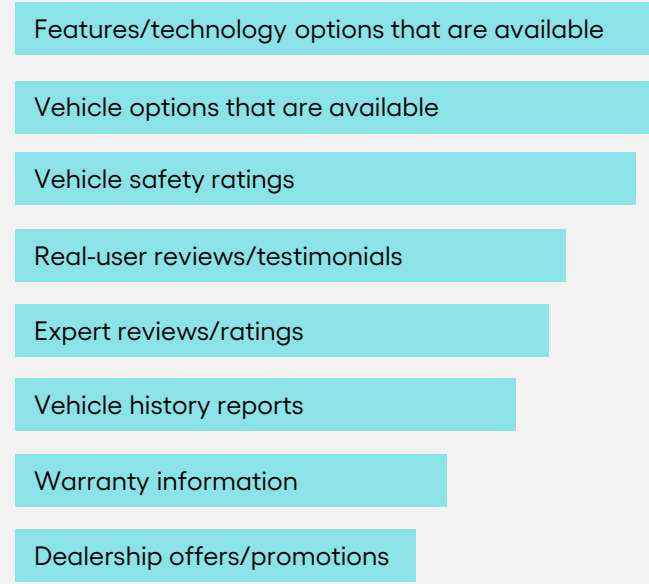
The topics people research reveal how they make decisions, and TikTok shoppers focus on the details that help them make the most informed choices. When choosing a vehicle, TikTok shoppers prioritize features, options and safety, as well as vehicle history reports and warranty information.

To uncover these details, shoppers actively seek out reviews, expert opinions and testimonials.



Most Important Types of Information When Selecting a Vehicle

(Max-Diff Results; TikTok Shoppers)



Max-Diff results are indexed to overall average of 100. The above types of information are those that generated a 100+ index score.



Most Trusted Sources on TikTok



These results show that TikTok shoppers want to understand their options, valuing clarity and information from trusted sources.



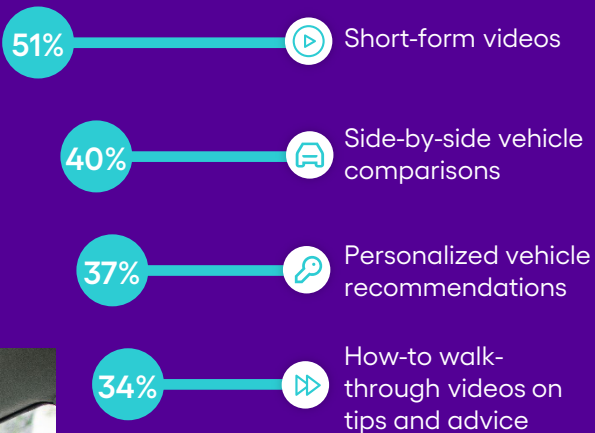
Creators make vehicle complexity easier to understand.

Decoding vehicle specs, features and ownership data can feel overwhelming. That's why TikTok shoppers turn to content from trusted creators to guide them. In particular, shoppers find short-form videos, vehicle comparisons and personalized recommendations most useful.

These creator-driven videos blend education and entertainment, making vehicle research approachable and credible while helping people feel informed early in the process. Auto brands can ensure they show up on the platform in an authentic way by partnering with the right creators.

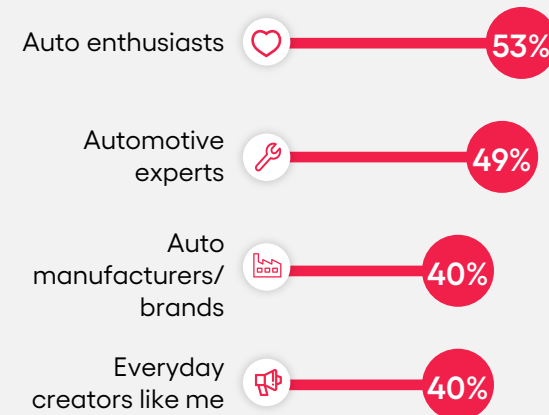


Most Memorable Content on TikTok



Collaborating with creators turns product details into stories people can relate to. This helps buyers see how vehicle features can impact their daily lives.

Most Useful Creator Types for Automotive Content on TikTok





Access to dealership information strengthens conversion.

As shoppers move closer to purchase, they want clear, practical details that make it easy to take the next step. Access to dealership information, such as available vehicles, promotions or pricing details, keeps them engaged.

These behaviors show that TikTok bridges the gap between vehicle discovery and purchase, helping shoppers connect what they've researched with where they can buy their vehicle.

TikTok brings this information to life in ways that feel natural, such as walk-through videos filmed on-site, creator reviews that highlight dealership experiences, and short updates on pricing or availability.

TikTok bridges the gap between vehicle discovery and purchase



How Vehicle Buyers Interact With Dealerships on TikTok



Turning Vehicle Discovery Into Demand

How automakers and dealers can make TikTok work for them.

03

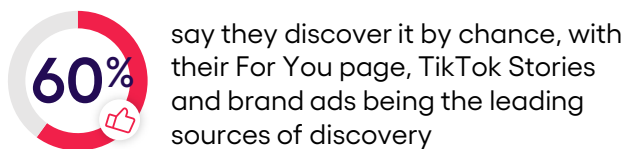
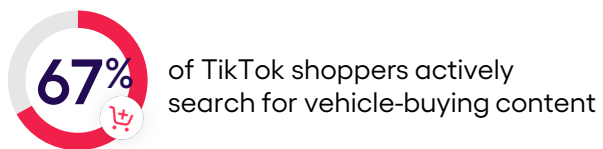




TikTok helps auto brands connect earlier and more effectively.

The research shows that TikTok drives early vehicle consideration, helping people learn, compare and decide what feels right before visiting OEM or dealer sites.




TikTok is the perfect place for shoppers to do so:



For automakers, that means the window of influence is wider for brands that are present and active on TikTok. Brands that invest consistently on TikTok stay visible throughout the vehicle-buying journey, becoming part of the research process, not just the final push to buy.

Leverage TikTok’s Full Funnel Toolkit of Products to Drive Success.

With TikTok’s full funnel offerings, OEMs and dealers can reach vehicle shoppers no matter where they are in the buying journey.

 Awareness	 Consideration	 Conversion
<ul style="list-style-type: none"> + Create videos explaining differences between models, side-by-side comparisons and useful advice on financing and features. + Get shoppers’ attention during key moments and across interest categories, like sports, with high-impact ad formats including Pulse, TopView and Top Feed. + Increase upper-funnel lift and drive longer watch times by promoting creator content using Spark Ads. 	<ul style="list-style-type: none"> + Build credibility and relevance by partnering with creators such as car enthusiasts, automotive experts and everyday owners and shoppers. + Analyze audience behavior, category trends and creative performance using TikTok Market Scope. + Improve full-funnel performance and grow high-intent audience pools with first-party signals from Consideration Ads. 	<ul style="list-style-type: none"> + Close the gap from research to purchase by showcasing local inventory, promotions and walk-throughs. + Spotlight real models, live inventory and offers using Automotive Ads for Models and Automotive Ads for Inventory. + Maximize campaign performance by fine-tuning targeting, creative, placement and budget with Smart+.



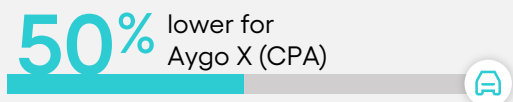
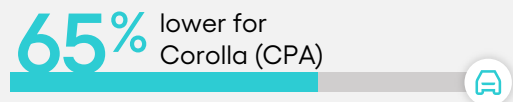
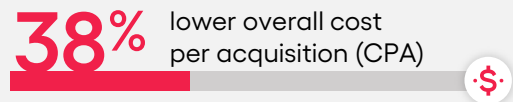
CASE STUDY

How Toyota Turned Early Discovery Into Higher Demand

Toyota Germany ran two parallel campaigns to evaluate TikTok’s new Automotive Ads category, combining In-Feed and Carousel Ads sourced from its product catalog with ongoing conversion campaigns.

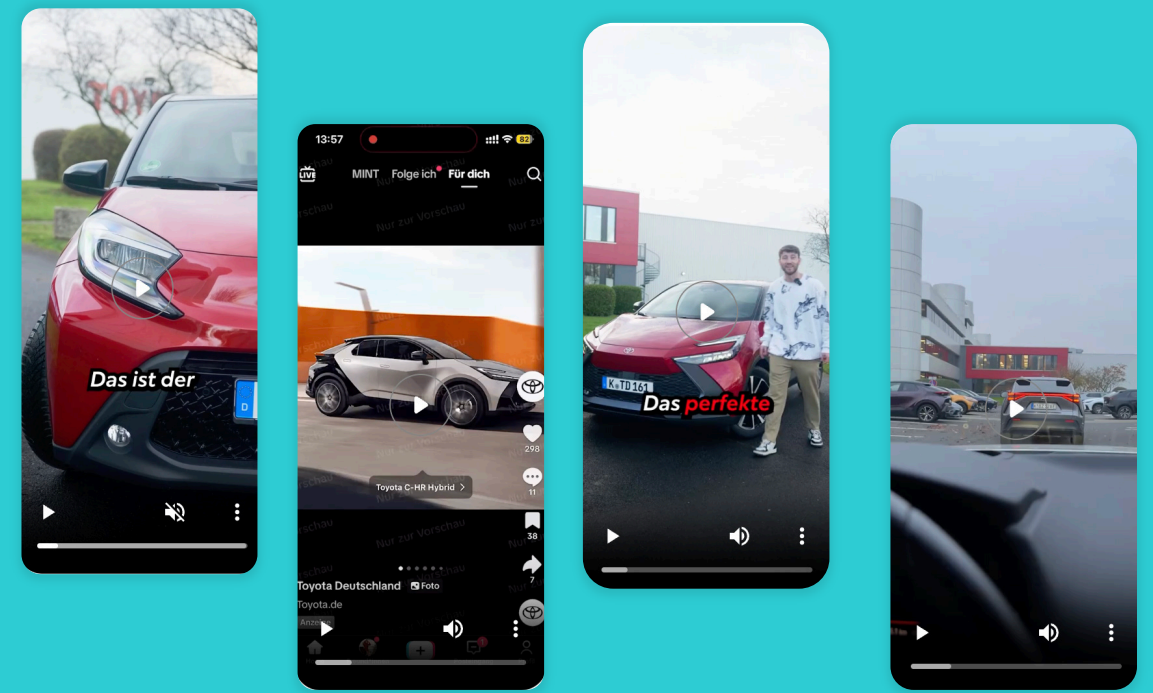
Each ad featured a clear call to action that guided users from TikTok directly to the company’s “Build Your Toyota” vehicle configurator page, allowing the brand to measure how early engagement on the platform translated into downstream activity.

The Result



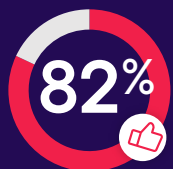
“TikTok has proven that they can tackle the full sales funnel and are indeed a driver in our performance approach, resulting in up to 65% lower CPAs with inventory ads, leading to a higher conversion baseline for Toyota Germany.”

— Senol Kasapoglu, Manager Brand Marcomm & Media, Toyota Deutschland GmbH

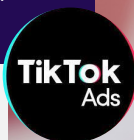


Vehicle-focused content closes the gap.

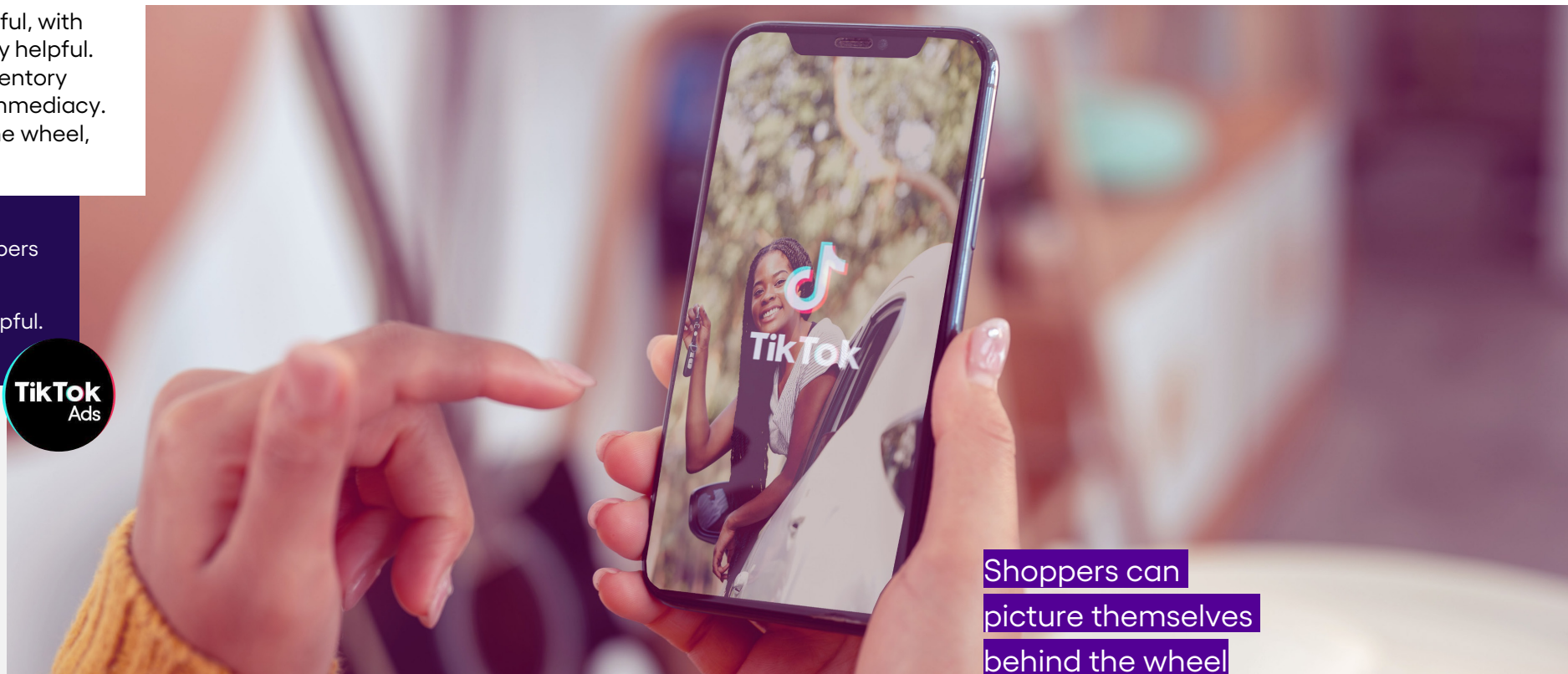
Shoppers find dealership ads on TikTok useful, with 82% saying ads are extremely to moderately helpful. For many shoppers, seeing local vehicle inventory and walk-throughs gives them a sense of immediacy. Shoppers can picture themselves behind the wheel, not just scrolling past another ad.



of TikTok shoppers say ads are extremely to moderately helpful.



This sense of connection often prompts TikTok shoppers to look for more details or check availability nearby. Shoppers who explore vehicle options on TikTok often continue to OEM or dealer sites next.



Shoppers can picture themselves behind the wheel

CASE STUDY

Turnkey Marketing Brings Local Vehicle Inventory to Life on TikTok

Turnkey Marketing used TikTok Automotive Ads for Inventory to showcase its dealership stock. The ads featured short, vertical videos that highlighted local vehicles, pricing and availability.

By pairing dynamic inventory feeds with localized targeting, the agency reached nearby, ready-to-buy audiences and drove higher in-market engagement for its dealer clients. This approach cut cost per acquisition by more than 90%, making TikTok its top-performing digital channel.

90% of cost cutting per acquisition by using TikTok Automotive Ads



“TikTok Automotive Inventory Ads are a game changer for dealerships. We’ve made a crucial shift from awareness-based marketing to a more transactional approach within the TikTok ecosystem, consistently delivering more and higher-quality traffic to dealership websites every month.”

— Drake Baerresen,
VP Sales & CMO,
Turnkey Marketing



“With almost 1 in 3 TikTok users in-market for a new vehicle, Automotive Ads are the perfect way for the industry to build an experience to reach users with the right content, the right product, at the right time.”

— Tsega Worku,
Head of Auto & Telco Verticals
for North America, TikTok

Recommendations for Auto Brands

TikTok is leveraged early and often throughout the vehicle-purchase journey, giving automakers and dealers an opportunity to build trust, spark interest through relatable storytelling and remain a part of the conversation as buyers move through each stage.

04



RECOMMENDATION 01

Create content that simplifies decision-making.

Vehicle shoppers use TikTok to learn and understand, not just for entertainment. According to the research, 80% of TikTok shoppers use the platform for vehicle research and 75% for discovery. Their most-watched videos include comparisons, tutorials and reviews.

Auto brands should engage these shoppers with short-form videos that:

- + Feature trusted creators explaining model differences and financing options
- + Use side-by-side comparisons, how-to videos and personalized recommendations to make technical information feel accessible
- + Highlight safety ratings and ownership stories that help shoppers feel informed rather than sold to



Content that answers people's questions earns attention and keeps your brand in the conversation as TikTok shoppers narrow their choices.

RECOMMENDATION 02

Increase relevance through authentic voices.

TikTok shoppers trust authenticity more than polish. Roughly half of TikTok shoppers consider content to be useful and trusted when it comes from vehicle enthusiasts (53%), automotive experts (49%) automotive manufacturers and brands (40%) and everyday creators (40%).

Brands can strengthen relevance by:

- + Partnering with automotive experts, enthusiasts and everyday drivers whose perspectives feel genuine
- + Encouraging creators to share honest vehicle reviews and first-hand experiences
- + Pairing expert voices with official brand messaging to validate claims and address consumer concerns

These relationships turn social engagement into brand assurance, reinforcing automakers and dealers as transparent partners in the vehicle-buying process.



RECOMMENDATION 03

Keep vehicle inventory and offers visible year-round.

More than a channel for awareness, TikTok has become a continuous research environment. Dealers and automakers that maintain a consistent presence stay top of mind when TikTok shoppers are ready to act.

Here's what brands can do to strengthen mid-funnel performance:



Showcase dealership details, including available vehicles, pricing and promotions, through short, localized videos and creator walk-throughs



Feature live vehicle inventory using Automotive Ads for Models and Automotive Ads for Inventory, which automatically update stock and offers



Combine national branding with local availability so people can easily move from research to contact



Toyota and Turnkey's results show the impact of consistently showing up on TikTok. Both brands reduced acquisition costs by meeting vehicle shoppers where research happens.

RECOMMENDATION 04

Meet economic realities head-on.

With ever-increasing new-vehicle costs, consumers are keeping vehicles for longer and shoppers are weighing long-term value more carefully than ever.

TikTok can help auto brands respond to these consumers by:

- + Spotlighting lower-priced, fuel-efficient vehicle models through targeted campaigns that emphasize total cost of ownership
- + Offering transparent explanations of financing and leasing options in short-form video
- + Using Market Scope insights to identify emerging demand segments, such as hybrid-curious buyers or value-driven switchers, and tailor messaging accordingly

By speaking directly to what shoppers are feeling now, automakers and dealers demonstrate empathy and earn trust in the moments that matter most.



Talk to the Experts

If you'd like help applying these insights to your own marketing strategy, or to better understand your audience and where their decisions begin, [connect with Escalent](#) or contact TikTok's experts below.



K.C. Boyce

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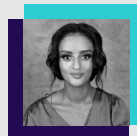
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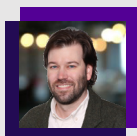
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About the Research and Methodology

This study was conducted by Escalent in partnership with TikTok to understand how consumers use social and video platforms, especially TikTok, throughout the vehicle-buying journey. Escalent surveyed 2,016 online respondents from August 18 to September 15, 2025 across the United States (n=1,181) and Canada (n=835). (Note: This report includes only US data.)

Respondents were ages 18–64 who had purchased a vehicle in the last six months or were planning to purchase a vehicle within the next 12 months. The sample included both TikTok users and non-users, and comes from an opt-in, online panel. As such, any reported margins of error or significance

tests are estimated and rely on the same statistical assumptions as data collected from a random probability sample. Escalent will supply the exact wording of any survey questions upon request.

Results were consistent between US and Canadian audiences, showing similar attitudes toward vehicle research, discovery and purchasing behavior on TikTok.

Escalent also conducted [secondary research](#) from publicly available industry sources to provide broader market context. Any secondary data and citations used in this report are referenced accordingly.



About Escalent

Escalent is an award-winning data analytics and advisory firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we accelerate growth by creating a seamless flow between primary, secondary, syndicated, and internal business data, providing consulting and advisory services from insights through implementation. We are 1,600 team members strong, following the acquisition of C Space and Hall & Partners in April 2023. Escalent is headquartered in Livonia, Michigan, with locations across the US and in Australia, Canada, China, India, Ireland, the Philippines, Singapore, South Africa, UAE and the UK.

Visit escalent.co to see how we are helping shape the brands that are reshaping the world.



About TikTok

TikTok For Business is the leading platform for short-form mobile video that empowers businesses to connect with highly engaged and diverse businesses. Our mission is to help brands inspire creativity, drive joyful, impactful experiences, and deliver smarter business results. TikTok For Business offers a suite of powerful products and tools to help brands optimize their campaigns, build meaningful connections and achieve tangible outcomes across a variety of industries. With global offices in Los Angeles, New York, London, Paris, Berlin, Dubai, Singapore, Jakarta, Seoul and Tokyo, TikTok For Business is positioned to support brands worldwide.

Find out more about TikTok For Business [here](#).

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