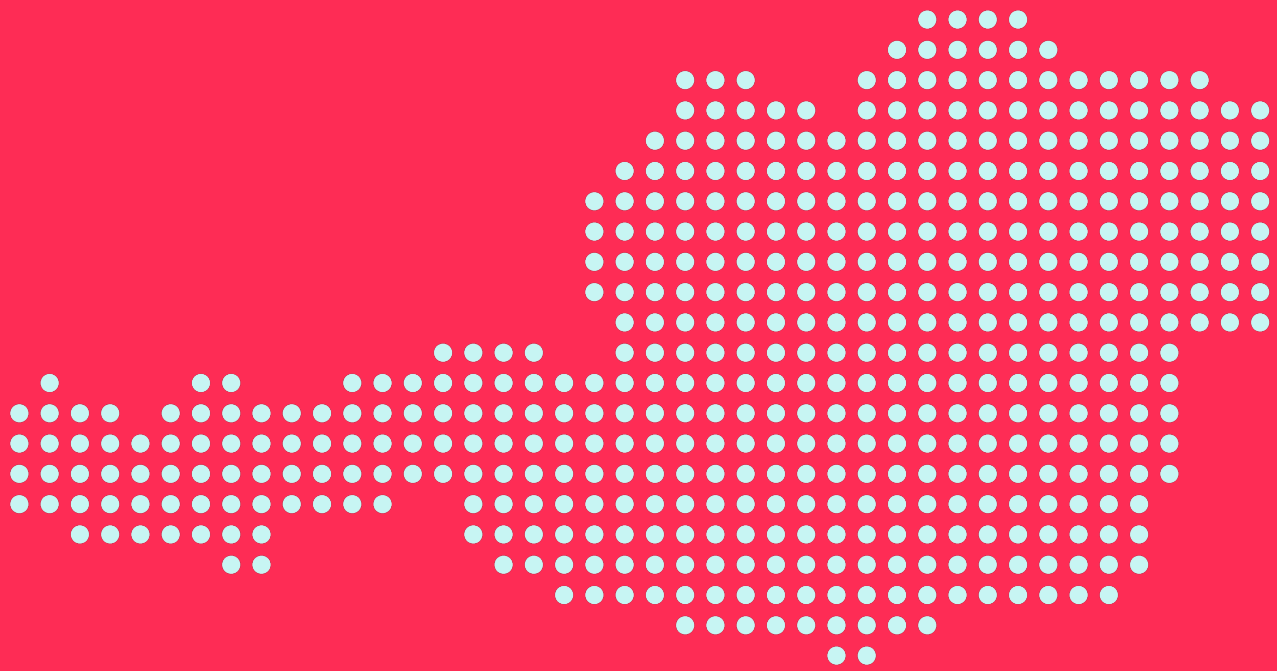
Discover. Create. Grow.

TikTok's Economic Impact in Austria



PF Global
Advice | Research | Argument

2026



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ABOUT THE RESEARCH

To better understand TikTok's impact across the Austrian economy, businesses, creators, and wider community, TikTok commissioned PF Global to conduct new independent research, which included:

Economic modelling, with a full methodology at the end of this report.
Independent, anonymous surveys of:

2,039 Austrian Adults

505 Austrian Businesses

4 case study interviews with businesses and creators about the role TikTok plays in supporting their work and their wider industry.

130 people interviewed on the record in immersive research in Salzburg.

ABOUT PF GLOBAL

PF Global is a policy, research, opinion and strategy consultancy. We bring a wide range of expertise and capabilities under one roof, including in-house opinion polling, focus groups and immersive qualitative research, robust data analysis, and a deep understanding of policy and politics.

We work with global companies, governments, start-ups, institutions and foundations around the world to tackle major public policy and strategic challenges.



Executive Summary

FOREWORD

Across Austria, 2.8 million people come to TikTok every month to create, discover and enjoy content on every topic imaginable.

But TikTok is not just about what people see on their screen. As President of Europe, what has struck me most is what then happens away from it too. A video about a neighbourhood café becomes tomorrow's lunch plan. A #BookTok recommendation becomes next week's bedtime read. A glimpse inside a Salzburg museum or a lesser-known Alpine destination can turn into a weekend away. A behind-the-scenes look at a cultural institution, a specialist craft demonstration or a practical skills tutorial can help someone find a new hobby, learn new skills and connect with a community around it.

That is what makes TikTok different. It is not just a place where people watch content. It is a window into the real world: a place where culture moves, businesses grow, people connect and ideas become reality.

This report highlights the tangible contribution TikTok is making to Austria's economy, generating €490 million in gross value added (GVA) and supporting 4,300 jobs across the country in 2025. Behind that impact is a story: a creator who has turned a hobby into a business, a family-run restaurant brand bringing its distinctive identity to international audiences, a regional hotel attracting new visitors and employees, or a local business that has never posted a video but whose bookings surged because its customers did.

For small businesses in particular, the ease of engaging on TikTok is helping break down traditional barriers and allowing them to compete with established brands. On TikTok a good idea can turn into a viable business proposition without necessarily needing a big advertising budget or a prime high street location. For Austria's specialised and often family-owned businesses, this means finding customers beyond their immediate communities while retaining the local expertise and identity that make them distinctive.

That effect is being felt across the economy. In music, TikTok helps artists find audiences and fans find new songs. In classical music and the arts, it helps cultural institutions introduce their heritage to new generations. In tourism and hospitality, it helps people discover places they might never otherwise have visited. And for businesses rooted in Austria's regions, it turns digital discovery into real-world visits, international interest and new opportunities for growth.

I am proud of the partnerships we have built across these sectors and proud of the creators who bring Austria's cultural heritage and regional communities to life every day. And we are proud of the businesses that use TikTok not just to market themselves, but to grow, hire and invest, connecting established traditions with new audiences and opportunities.

All of this can only happen by keeping our platform a safe and enjoyable space for our entire community, and we continuously invest in measures to ensure this, including our investment in Project Clover, one of the most advanced data protection systems to be found anywhere in the world.

We are proud of our contribution to the Austrian economy and culture, and are committed to growing that contribution even further, supporting Austrian creators, strengthening regional businesses and helping businesses of every size reach the people who matter most.



CYNTHIA SANFILIPPO
President, Europe

Despite its relatively small size, Austria plays a significant role in Europe's economy, with its combination of strong cultural institutions, substantial industrial base and specialist manufacturing, and third-highest intensity of Research & Development (R&D) in the EU. These strengths are incredibly regionally centred, and concentrated in Austria's wealth of specialist small and medium-sized businesses (SMEs).

In a country with an economy built around small, specialised and regional roots, TikTok gives businesses, places and culture another route to discovery. This helps, in turn, what is created and experienced locally reach audiences in Austria and beyond.

Across the EU, TikTok is playing an important role in supporting economic output. PF Global estimated that economic activity supported by TikTok across the EU underpinned €31 billion in economic output in 2025. This captures not only the direct activity enabled by TikTok, but also the knock-on economic activity generated across the wider economy.

Building on this analysis, PF Global was asked to go into more detail to assess the role that TikTok plays in contributing to specific European economies, using a more focused measure, the gross value added (GVA), and the jobs supported as a result.

Taking TikTok's app, TikTok Shop and TikTok LIVE together, PF Global estimates that TikTok contributed €490 million in GVA to the Austrian economy in 2025, supporting 4,300 jobs.

€490m

in GVA generated for Austrian businesses by TikTok in 2025.

4,300 jobs

supported across Austria by TikTok-enabled business activity.

73%

of Austrian businesses using TikTok say it has helped them grow their sales and revenue.



TikTok Is Helping Austrian Businesses Reach New Heights (and Customers)

Among Austrian businesses using TikTok, 69% agree that the platform enables them to reach customers they would otherwise be unable to, while 73% say that it has helped them grow their sales and revenue.

This is particularly key for Austria's small-business driven economy. The impact of TikTok for these businesses is already visible: 74% of businesses using TikTok agree that it speeds up the pace at which SMEs can grow and scale. On a national scale, 66% say it has helped give visibility to products and services nationally without requiring large advertising budgets.

69%

of Austrian businesses using TikTok agree that the platform enables them to reach customers they would otherwise be unable to.

74%

of businesses using TikTok agree that it speeds up the pace at which SMEs can grow and scale.

33%

report hiring new people as a result of TikTok, either through activity on the platform or additional business associated with it.

By reducing some of the disadvantages associated with scale (e.g. limited existing brand awareness, regionally concentrated customer bases and smaller marketing budgets), TikTok acts as more than just another advertising channel. It gives specialist and locally-rooted organisations alternative routes to get good products, services and ideas in front of potential customers.

This greater demand is also translating into employment for one third of Austrian businesses using TikTok already – 33% report hiring new people as a result of TikTok, either through activity on the platform or additional business associated with it.

Keeping It Real: Digital Discovery = Real-World Demand

For Austria, digital discovery is contributing to real-world footfall for businesses with physical locations. 57% of businesses with a physical location say TikTok has increased the number of customers visiting them in person, with 23% saying significantly.

57% of businesses with a physical location say TikTok has increased the number of customers visiting them in person, with 23% saying significantly.

The consumer survey tells a similar story. Almost one in three (32%) of Austrian TikTok users say they have visited a local café or restaurant after finding it on TikTok. 24% have visited another Austrian town or city, and 20% have visited an independent shop in real-life.

32% of Austrian TikTok users say they have visited a local café or restaurant after finding it on TikTok.

24% have visited another Austrian town or city.

20% have visited an independent shop in real-life.

Content created by customers, visitors and creators can translate into footfall for restaurants, shops, attractions and destinations, including businesses that may not themselves have a significant digital presence.

Taking Austria's Regions and Traditions to New Audiences

Austria's economic strengths are intimately tied to place. Regional food, crafts, clothing, tourism-related services and cultural traditions sit comfortably among internationally recognised institutions and brands. TikTok can help these local products and experiences travel further. 60% of businesses using TikTok say that the platform has increased exposure for regionally focused products and services, while 56% say it has helped them market their business internationally. 64% of businesses using TikTok say it has helped them reach customers outside of their immediate community.

60% of businesses using TikTok say that the platform has increased exposure for regionally focused products and services.

More than half of Austrian TikTok users (53%) have bought a traditional Austrian product after seeing it on the platform.

Consumers are acting on what they discover via TikTok. More than half of Austrian TikTok users (53%) have bought a traditional Austrian product after seeing it on the platform. The opportunity presented in Austria is for digital discovery to complement, rather than replace, Austria's pre-existing regional business models. Local businesses can retain their regional identity while reaching customers outside of their immediate sphere.



Supporting Skills

Austria's economy faces longer-term challenges around skills shortages, an ageing population and persistent gaps in digitalisation. In this context, connecting people with job opportunities and pathways to new skills is just as important as helping businesses reach new customers.

Around one in three Austrian TikTok users (33%) say they have used TikTok to discover new career opportunities, including jobs, courses, qualifications or networking opportunities. 17% say they have learned a skill through TikTok that was useful in their existing job, and 10% say they learned a skill that enabled them to move into a new role.

Around one in three

Austrian TikTok users (33%) say they have used TikTok to discover new career opportunities, including jobs, courses, qualifications or networking opportunities.

17%

say they have learned a skill through TikTok that was useful in their existing job.

10%

say they learned a skill that enabled them to move into a new role.



TikTok's Impact in Austria

€490m

A €490 million contribution to Austria's economy

in GVA generated for Austrian businesses by TikTok in 2025.

€150m

Exporting Made in Austria

in Austrian exports enabled by TikTok-driven exposure.

€200m

Backing Austria's SMEs

in GVA generated for Austrian SMEs by TikTok in 2025.

4,300 jobs

Supporting jobs across Austria

supported across Austria by TikTok-enabled business activity.

73%

Growing sales and revenue

of Austrian businesses using TikTok say it has helped them grow their sales and revenue.

57%

Turning discovery into footfall

of TikTok-using businesses with a physical location saw increased numbers of customers visiting them in person.

Almost seven in ten

Reaching new customers

Austrian businesses using TikTok say it enables them to reach customers they would otherwise be unable to.

One third

Creating new jobs

of Austrian businesses using TikTok have hired new people as a result of the platform.

53%

Discovering traditional products

of Austrian TikTok users have bought a traditional Austrian product after seeing it on TikTok.

€5.6m

Austria's classical music heritage

in additional revenue for musicians, venues, festivals, educators and cultural tourism around Austria's classical music heritage.

Continue to Chapter 1: How TikTok Drives Economic Growth in Austria.

→



How TikTok Drives Economic Growth in Austria

€490m

in GVA for businesses in Austria in 2025.

4,300 jobs

supported across Austria.

73%

of Austrian businesses using TikTok say the platform has helped them grow their sales and revenue.

Visibility That Means Something

Being visible is only meaningful to a business' bottom line if it translates into something tangible – new customers, new markets, new routes to growth. TikTok helps Austrian businesses achieve this by creating new ways for potential customers to discover their products and services, even when they aren't actively searching for them.

Among Austrian businesses using TikTok, 69% agree that the platform allows them to reach customers who otherwise would have been unreachable. This is translating into commercial results: nearly three-quarters of businesses using TikTok (73%) have seen increased sales and revenue as a result of the platform, and one quarter have sold out a specific product due to TikTok.

Turning Attention into Growth

For some this greater visibility has led to wider business development, beyond revenue or sales. TikTok gives businesses a relatively immediate way of testing customer response to products, messages and ideas. 64% of Austrian businesses using TikTok say it has helped them test ideas and respond to consumer demand more quickly. Almost one third (31%) say TikTok has helped them come up with new business ideas, and 23% say they have launched new products because of the platform.

Feedback loops matter. Growth does not just stem from selling more of an existing product or service, but from identifying gaps and fresh demand earlier, adapting, and beneath all this having the confidence to try something new.

Almost one third

(31%) say TikTok has helped them come up with new business ideas.

64%

of Austrian businesses using TikTok say it has helped them test ideas and respond to consumer demand more quickly.

23%

say they have launched new products because of the platform.

Smaller businesses stand to benefit from this tightened call-and-response to consumers especially. The ability to experiment without committing significant financial or human resources can lower the costs associated with the often necessary process of trial and error.

TikTok can therefore support businesses of all sizes at multiple points in the growth process: 1) helping with idea generation and dissemination, 2) showing businesses how customers respond in close to real-time, 3) providing another channel through which successful ideas can spread, and 4) converting interest into sales, whether in-store, online, or through TikTok Shop.

Digital Discovery Turned Physical Footfall

Almost two-thirds of Austrian businesses using TikTok have a physical location visited by customers. 57% of these businesses say TikTok has increased the number of customers visiting them in person- 23% say it has increased visits significantly.

57% of these businesses say TikTok has increased the number of customers visiting them in person.

23% say it has increased visits significantly.

The economic pathway from TikTok is thus wider than online sales. Someone might discover a restaurant, shop, attraction or destination through a TikTok video, but ultimately spend their money in the brick-and-mortar shop, at a café counter or during an in-person visit or booking.

Extending and Strengthening International Reach

For businesses in a relatively small domestic market, branching out into a broader market can be a crucial route to growth. 64% of Austrian businesses using TikTok say it has helped them reach customers outside their immediate local community, and 56% to market their business internationally.

We estimate that in 2025, TikTok-driven exposure enabled €150 million in exports for Austria. That is roughly equivalent to around €16 for every person living in Austria.

€150m in exports for Austria enabled by TikTok-driven exposure in 2025. That is roughly equivalent to around €16 for every person living in Austria.

For businesses in a tourism-heavy city such as Salzburg, the need for international visibility is particularly tangible. As one local retail worker put it during our immersive research:

> **'If [businesses] don't use TikTok here, international people won't see it because they use TikTok a lot.'**
>
> *Woman, 20s, Local, works in a Salzburg clothing store*

This reach is illustrated even down to the audiences being built by Austrian businesses on the platform. 80% of Austrian businesses using TikTok report having followers in Germany, 48% in Italy and 39% in France. A follower does not map directly to an export, but does show that Austrian businesses are using TikTok to build awareness well beyond their domestic customer base.

Businesses do not necessarily need mass market recognition to grow. But they do need to become visible to the people most likely to value, and purchase, what they produce or the services they offer. TikTok can shorten the distance between businesses and these audiences.

Where Austrian businesses on TikTok have followers abroad

Share of businesses using TikTok reporting followers in each country

PF GLOBAL SURVEY OF AUSTRIAN BUSINESSES, 2026



CHAPTER 01 · HOW TIKTOK DRIVES ECONOMIC GROWTH IN AUSTRIA.



CASE STUDY

NENI: Bringing a Family Food Brand to Life

For NENI, family has always been at the heart of the business, even down to the name! Founded in Vienna's Naschmarkt in 2009, the company has expanded across Europe, with restaurants across Germany, Switzerland, France, the Netherlands, Sweden, and Spain. This heritage shapes how NENI presents itself online, and in TikTok they found a natural fit for their brand and their 'more authentic' approach to creating content:

> **'Food in particular has become a huge content pillar on social media generally, and you can show the visual side really nicely through videos and short formats [...] that's what draws people into the restaurants. TikTok in particular is more approachable and personal.'**

TikTok offers the team more than a place to showcase dishes. It allows the business to communicate the atmosphere around the food — the people behind it, the humour, the family relationships and 'the feeling through your phone screen of "OK, I'm sitting in the restaurant right now" or "I'm actually in this kitchen and can practically smell it or taste it."' They want to immerse their TikTok audiences in 'the world of NENI', and this is clearly shown in their content, which leans much more heavily towards shared family moments and storytelling.

That is particularly relevant for a business that has grown beyond its original Vienna home. As NENI has expanded internationally, TikTok has provided a way to maintain their distinctive and recognisable sense of family, food and atmosphere across different markets, while also supporting its growth. The team highlighted campaigns around the NENI cookbook and its expansion in Germany as particularly important examples of its use of the platform around key milestones.

> **'Not being on TikTok in 2026 as an international business would, I think, be a real shame.'**

For NENI, the value of TikTok goes beyond expanding visibility. It rests on its ability to translate a physical restaurant experience into something people can discover and engage with digitally — helping audiences understand what NENI feels like, not just what it sells.

The Creator Economy

Austria has 2.8 million active monthly users, and 41% of adult account holders we surveyed identified as ‘casual creators and 41% of adult account holders we surveyed identified as ‘casual creators’.

CASUAL CREATOR

Those who post on TikTok, but do not select getting a brand deal, sponsorship, or generating other income by posting on the platform as a reason for posting.

2.8m

active monthly users in Austria.

41%

of adult account holders we surveyed identified as 'casual creators'.

42% of these Austrian creators agree that their content promotes creativity and 30% agree that it promotes culture. Among those who post on TikTok, one in five (20%) say they have received some form of income from their content. This does not equate to one in five Austrians being professional creators, but does demonstrate how creating on TikTok can provide an accessible route via which to generate economic opportunity using existing skills and creativity.

Creator activity is also building wider transferable skills: among our respondents asked about applying skills learned through producing TikTok content, 49% have used those skills in their current job at least once (11% frequently).

> **'They can showcase our stuff, especially if they have a certain fan base or people they reach [...] Most of the influencers that we work with are promoting some kind of sustainability, or how to be fashionable without having to buy all new stuff.'**
>
> *Woman, 20s, Local, works at a vintage store*

There is also a real demand for creators from Austrian businesses. Among businesses using TikTok, 83% have engaged TikTok creators for promotional work, including 74% who do so regularly or occasionally. Of these, 59% commissioned creators to produce promotional content on their own channels, 42% had the creator appear in content produced by the business, and 31% worked through the TikTok Shop creator affiliate programme. Among the same group, 65% have collaborated with a creator through TikTok LIVE.

How Austrian businesses work with TikTok creators

Share of businesses that have engaged creators

PF GLOBAL SURVEY OF AUSTRIAN BUSINESSES, 2026







The SME Economy: Lowering the Cost of Discovery

€200m
generated in GVA for small and medium-sized businesses in Austria.

74%
of businesses using TikTok agree that the platform speeds up SMEs' growth and scaling.

34%
of SMEs say TikTok has helped them promote products and services nationally without requiring large advertising budgets

Austria's business landscape is dominated by small firms. In fact, small businesses are the main form of enterprise, with around 604,100 SMEs operating in 2024, accounting for around 99.7% of businesses and 65% of Austria's employment.

The scale within Austria's SME population is itself striking. Around 92% of Austrian businesses are microbusinesses, with fewer than ten employees. This often means that the owner may also be the manager, salesperson, marketer, and everything else in between. As a result, many lack the capacity or resources for traditional mass-market advertising, compounded by the dominance of family-owned businesses, with their need to maintain visibility, modernise and attract a new generation of customers particularly pressing.

Austria's SMEs are often highly specialised, export-oriented and heavily integrated into global supply chains (Report on the situation of SMEs in Austria ('KMU im Fokus 2025'). For these businesses, gaining visibility beyond their immediate community is not a nice-to-have, but a make-or-break factor for growth. This makes reach without the need for a larger company's infrastructure incredibly relevant to Austria's business ecosystem. This is an area TikTok is perceived to have particular strengths in by Austrian businesses using TikTok: almost three-quarters (74%) agree that TikTok speeds up the pace at which SMEs can grow and scale, with key drivers of this being the ability of TikTok content to go viral regardless of business size or follower count, and making it possible to test and iterate products, ideas or messaging approaches rapidly.

Expanding the Local Area

Austria's economy is shaped by distinct regional strengths, with businesses closely connected to local skills, products and traditions. Upper Austria, for example, is the country's industrial, manufacturing and export powerhouse. Styria has developed its own distinctive industrial and technology base, with particular specialism in mobility.

These regional strengths are sustained by networks including larger employers, but predominantly by smaller specialist businesses, suppliers and producers whose expertise is closely linked to place. A business established around a particular town or in a specific region may historically have depended heavily on local awareness and repeat customers. Digital discovery allows businesses such as these to widen its potential audience without diluting its local identity.

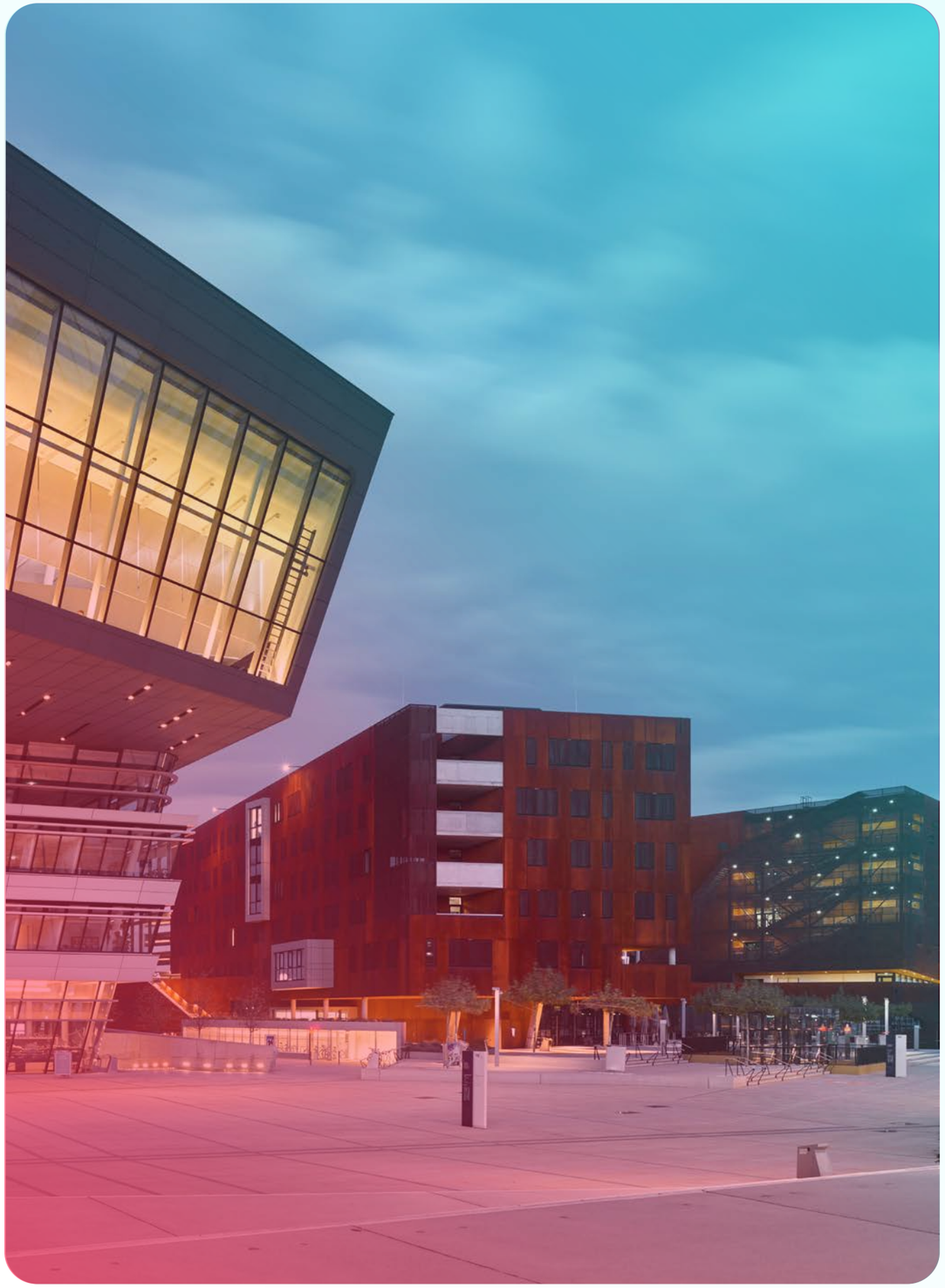
60% agree that TikTok has increased exposure for regionally focused products and services, including local products and tourism.

64% say the platform has helped them to reach customers outside of their immediate community.

Among Austrian businesses using TikTok, 64% say the platform has helped them to reach customers outside of their immediate community. 60% agree that TikTok has increased exposure for regionally focused products and services, including local products and tourism.

TikTok changes the potential market available to regional businesses: their physical location remains fixed, but the geographies available to them do not have to be.

CHAPTER 02 · THE SME ECONOMY: LOWERING THE COST OF DISCOVERY.





CASE STUDY

Bio Vollwertbäckerei Gradwohl: Bringing a Traditional Family Bakery to a New Generation

For over sixty years, the Bio Vollwertbäckerei Gradwohl has been baking in a special way, using wholefood ingredients and freshly milled whole-grain flour. Founded in 1959 by Johann Gradwohl, the family business was an early pioneer of organic, wholegrain baking in Austria. At a time when millers did not routinely produce flour using whole grain, Gradwohl did it himself.

From its beginning in Weppersdorf, the business expanded across Austria, building its reputation through health-food shops and referrals from nutritionists and doctors. For customers with allergies, intolerances or an interest in wholefood nutrition, Gradwohl became a trusted name, one often passed from parents to their children and grandchildren.

Today, the challenge is not moving away from this heritage, but introducing it to a new generation. Hence the family turning to TikTok.

Putting the people behind the product: Gradwohl's content is not built primarily around conventional product advertising. Instead, the bakery uses TikTok to explain wholegrain baking and the work that goes into their products, with members of the family and team themselves at the centre. As the team describes it, the aim is to show 'the person behind the product'. Oliver Gradwohl and Julia Bader-Gradwohl are positioned not simply as people selling bread, but as recognisable voices explaining why the business operates as it does.

This has helped make the established family business more visible to younger audiences: Oliver says that younger people increasingly recognise the team around Vienna, sometimes approaching them with an immediate: 'Hey, I know you.' This recognition is also increasingly translating into commercial opportunity. The team estimates that around 30-40% of customers to their online shop come through social media, and the effects are visible offline too. Some customers have told the team that they've driven to the bakery on their day off purely to buy something.

For a smaller family business, this ability to reach people without a large advertising operation is particularly valuable. As Julia puts it:

> **'Small companies often don't have the budget or the means to present themselves well. TikTok is great for reaching particular target groups.'**

Tradition without standing still: For Gradwohl, social media is therefore less about reinventing a traditional business than finding a contemporary way to explain what has always made it distinctive. Showing the bakery at work allows audiences to understand the craft behind the finished loaf. That transparency has also had effects beyond sales. The team says its content has prompted more speculative job applications, while giving potential recruits a clearer picture of what working in the trade actually involves.

Gradwohl's experience illustrates a wider opportunity for Austria's family-owned and specialist businesses: tradition and digitalisation do not have to pull in opposite directions. TikTok can give a long-established business another way to show the people, skills and principles behind its products, helping local expertise remain visible to the next generation.

Competing for Attention Without Competing on Scale

For small and micro businesses, creating marketing content, testing different approaches and maintaining a digital presence all require capacity which a small team may struggle to spare. Tools which reduce the resources needed to handle even one of these components can therefore have outsized impact and value for smaller firms.

Among Austrian businesses using TikTok, 66% say the platform has helped them promote their products or services nationally without the need for large advertising budgets. Almost seven in ten (69%) Austrian businesses using TikTok agree that the platform helps their business compete with global brands. This helps to lower one of the most central barriers to entry – a business does not need extensive existing brand recognition for its content to reach people beyond its current base.

Almost seven in ten

(69%) Austrian businesses using TikTok agree that the platform helps their business compete with global brands.

66% say the platform has helped them promote their products or services nationally without the need for large advertising budgets.

Large businesses still benefit from greater capital, established distribution networks and brand recognition, but the platform can help to level out these advantages at the point of discovery. With TikTok, a small business can demonstrate how a product is made, show the team behind it, answer questions or provide explanations as they are requested, and all without first buying access to a mass audience.

This is relevant to Austria, where economic heft frequently derives from specialisation rather than scale. For a specialist producer or service business, success may depend less on reaching everyone and more on reaching the right customer. TikTok helps to prioritise quality and relevance, even where the business behind them is small.

CHAPTER 02 · THE SME ECONOMY: LOWERING THE COST OF DISCOVERY.

Small Businesses, Big Opportunity

For an economy in which almost every business is an SME – and where the overwhelming majority of businesses employ fewer than ten people – lowering the resources required to reach, understand and engage potential customers can have huge value at scale.

Beyond content, TikTok's training and self-serve tools also help to lower traditional barriers to entry for SMEs. Our modelling shows that these tools reduce EU production time for advertising content by 14%, which could potentially unlock the equivalent of €3.2 million in productivity gains for Austrian SMEs to redirect into product development, customer relations, and commercial strategy.

€3.2m

in productivity gains for Austrian SMEs to redirect into product development, customer relations, and commercial strategy — TikTok's training and self-serve tools reduce EU production time for advertising content by 14%.

It is not about turning Austria's small businesses into large ones. It's about allowing small, specialist and locally rooted businesses to access an audience no longer limited by the size of their marketing team or boundaries of their immediate region.



Skills, Learning & the Labour Market

34%

of Austrian TikTok users are 'Scholars' — identifying access to new information on a topic they are interested in learning more about as the primary benefit of the TikTok app.

One in three

Austrian TikTok users (33%) have used TikTok to discover new career opportunities.

Austria's labour market is shaped by strong institutions and well-established pathways into work, with the Wirtschaftskammer Österreich (business chamber, WKÖ) and Arbeiterkammer (workers' council) playing key roles. But even with these institutions and routes in place, the live issue of skills shortages across Austria persists. 78% of Austrian businesses surveyed by the WKÖ in 2026 said they were affected by labour shortages and lack of skilled workers. The WKÖ estimates this shortage equates to around 155,000 workers. (WKÖ Fachkräfte-Radar: Gemeinsam Fachkräfte sichern)

TikTok can act as a complement to existing workforce routes and models, helping businesses reach potential employees, and helping people discover possibly unfamiliar occupations and new opportunities. One in three Austrian TikTok users (33%) say they have used TikTok in this way, discovering new career options, job openings or networking.

For Austria's smaller and more traditional businesses too, the challenge is less about creating new kinds of jobs and more making existing roles, trades and career pathways more visible to the next generation of workers. TikTok can help close this discovery gap, connecting people with opportunities and giving businesses alternative ways to explain what their work actually involves.

Learning for Life

Austria has the highest proportion of 'Scholars' across the EU markets surveyed (34%). This means that around a third of Austrian TikTok users identify access to new information and learning as the prime benefit and main reason for their use of TikTok. That interest is already translating into practical skills.

Of Austrian TikTok users, 17% say they have learned a new skill through TikTok that was useful in their existing job, while 10% say they learned a skill that enabled them to move into a new role.

Learning through the platform also extends beyond employment, and into everyday value for Austrian citizens. More than one in four (26%) Austrian TikTok users say they have learned a new skill through the platform that helped them save money, for example repairing a device or small appliance in their home. Around a third of those who use TikTok for some form of learning have used it for DIY tutorials (34%), and almost a quarter have used it to learn a foreign language (24%).

More than one in four

(26%) Austrian TikTok users say they have learned a new skill through the platform that helped them save money, for example repairing a device or small appliance in their home.

One young woman in Salzburg described moving from encountering a craft in her feed to actively searching for tutorials:

> **'I think it helps me to develop an interest in something, and then it's very easy to get a lot of information on it. Like, I see a video about crocheting, and then I type in "how to crochet", and you get a bunch of videos showing you all different kinds of stuff on that topic.'**
>
> *Woman, 20s, Salzburg Local*

These findings suggest that TikTok is functioning in Austria as an accessible starting point for practical learning. It does not replace formal training or qualifications, but can help people encounter useful information and knowledge, try something new and build more widely applicable skillsets.

Not Too Cool for School

TikTok can also act as a complement to traditional or formal routes to learning. Almost one in five users (19%) say they have used the platform to practise or hone a skill or topic they are learning elsewhere. Content on TikTok can provide alternative ways to revisit a subject, find different explanations to suit users' learning styles, or practise something between more formal periods of learning.

In some cases, TikTok is also encouraging people to take a further step in their wider educational journey. 12% of Austrian TikTok users have signed up to an online course after hearing about it on the platform. Here, TikTok plays an early role in the learning journey, sowing the seeds of interest or pointing to an opportunity which users can then pursue away from the platform.

> **'I am using [TikTok] to learn how to speak English better, so I've been using it for a while for that and it's helping ... it doesn't cost money.'**
>
> *Male, 20s, Salzburg Local*

Easing the Career Path

Before somebody can apply for a job or pursue a specific qualification, they need a base understanding and awareness of said opportunity. TikTok is helping to make these opportunities more visible.

One in three Austrian TikTok users (33%) have used TikTok to discover new career opportunities, including job openings, courses, qualifications or networking opportunities. This is particularly pronounced among younger adults: 43% of TikTok users aged 18-24 and 39% of those aged 25-34 have used the platform in this way.

43%

of TikTok users aged 18-24 have used the platform in this way.

33%

of Austrian TikTok users have used TikTok to discover new career opportunities.

This is not TikTok determining career choices, but widening the field of possibilities and spurring a potential first step towards further research, training or an application.

Bridging the Skills Divide

The skills shortage challenge for Austria is not simply creating more jobs. It is about making existing opportunities visible, helping people understand the routes into them and ensuring that skills can keep pace with changing demand.

TikTok's relationship with Austria's labour market operates on both sides of the shortage. On the side of business, increased demand generated by TikTok activity can create a need for additional workers. One third of Austrian businesses using TikTok have hired new people as a result of the platform. On the side of users, TikTok can make skills, jobs and training opportunities easier to encounter online. It does not bestow qualifications, or guarantee a new role, but it can help to bridge an earlier gap (namely, not knowing that the opportunity exists in the first place).

One third

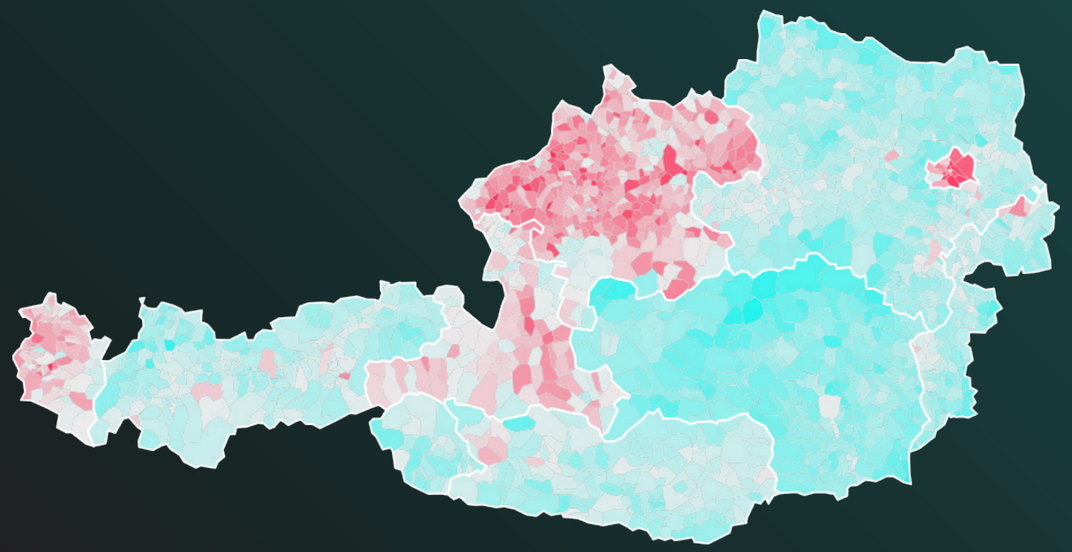
of Austrian businesses using TikTok have hired new people as a result of the platform.

Austrian businesses need people with the right skills, and workers need to know where opportunities are and the skills they need to access them. TikTok's potential contribution is helping to close the discovery gap that can exist between a job opportunity and the person who might fill it.

CHAPTER 03 · SKILLS, LEARNING & THE LABOUR MARKET.

TikTok can help people discover new information and skills

% of adults agreeing, by municipality (Vienna by district).



29% 40%



Tourism and Cultural Discovery

€58m

In 2025, TikTok-driven discovery and content amplification turned social trends and cultural moments into measurable footfall, with €58 million in additional expenditure in Austria on tourism, retail, hospitality, and services.

Austria artfully combines the internationally recognisable with the intensely local. Vienna's cultural institutions and Salzburg's classical music heritage sit comfortably alongside Alpine landscapes, regional cuisine, local festivals, traditional crafts and customs that can differ from one valley to the next.

The means by which both locals and international tourists discover all Austria has to offer is key. People need to encounter a destination, restaurant, museum or event before they can decide to visit; TikTok provides another route by which this can happen.

From Digital Discovery to Real-World Footfall

Tourism is a major part of the Austrian economy. Austria recorded 157.3 million overnight stays in 2025, three-quarters of which were international visitors, and 6.5% of GDP was directly generated by tourism in 2025. (National data)

TikTok can play a role across the tourist journey. A short video about a specific neighbourhood, restaurant, hike or cultural event can reach people who were not actively researching it. This effect is particularly important for smaller places and businesses, reducing the need for an established name or a large marketing budget to bring people in.

> **'Content-wise, I would say TikTok is probably the best. It has recommendations for shops, places to visit, or even just small content like, "hey, this is the history."'**
>
> *Male, 30s, Dutch Tourist*

There is evidence that Austrian TikTok users are already turning these discoveries into action, especially when it comes to rediscovering their own local area or exploring more of Austria. Almost one in three Austrian TikTok users (32%) say they have visited a café or restaurant in their local area after seeing or hearing about it on TikTok. 24% have visited another Austrian town or city, while 20% have visited an independent shop in their area.

32%

say they have visited a café or restaurant in their local area after seeing or hearing about it on TikTok.

24%

have visited another Austrian town or city.

20%

have visited an independent shop in their area.

It's not just the location or business featured that stands to benefit from exposure via TikTok. For instance, someone brought into the local area for a particular café may also use public transport, visit other nearby shops or stay overnight in a local hotel.

TikTok may also influence the kinds of experiences appearing in the city. During our immersive research, some younger residents explained how trends they were encountering online were feeding into Salzburg's food and café scene, bringing new ideas into the city.

> **'I think TikTok is why we have matcha in Salzburg - it is an old city and sometimes it feels like we are behind on the trends [...] I don't think we would have so many matcha cafés or even a lot of the trendy cafés without TikTok.'**
>
> *Woman, 20, Salzburg Local*

Discovery helps create a reason to visit, the visit creates the opportunity to explore (and spend in) the area, and all this activity can be distributed far beyond the original piece of content.

CASE STUDY

WienTourismus: Showing Visitors a Different Side of Vienna

VIEW →

The Vienna Tourist Board is the official tourism organisation of the City of Vienna. It promotes the city internationally and supports guests with information and services. However, its role increasingly goes beyond simply attracting more tourists: together with businesses and other stakeholders throughout Vienna, it ensures that tourism develops in such a way that it contributes equally to the quality of life in Vienna and to the quality of the visitor experience. With its 'Optimum Tourism' strategy, the Vienna Tourist Board pursues the principle of 'good growth'. The focus is not on maximising the number of guests, but on tourism that creates economic added value and at the same time reconciles the interests of guests and the city.

This attitude also characterises communication on TikTok. Instead of primarily addressing only certain age groups or markets, the Vienna Tourist Board consistently focuses its content on the so-called desired guest:

> **'People who are interested in culture and open-minded, spend several nights in Vienna and like to come back.'**

Since the launch of the TikTok account in August 2024, the Vienna Tourist Board has gained more than 140,000 followers from a wide range of age groups and collected over 3.4 million likes.

> **'Especially in the travel context, TikTok has proven to be one of the most important sources of inspiration.'**

Retelling the familiar: Some of the most successful content from the Vienna Tourist Board picks up on familiar elements of Austrian culture and shows them in a surprising and contemporary way. The ten-part campaign 'Will it Schnitzel' with star chef Lukas Mraz achieved 8 million views and received several international awards. The three-part format 'Spice Up Vienna' around the Eurovision Song Contest with ESC winner JJ (Johannes Pietsch), who reinterpreted classic Viennese dishes, brought in a further 3 million views. In addition, the Vienna Tourist Board uses TikTok LIVE for its 'Live Walks' series and collaborates with creators on various campaigns.

Adding to the familiar, making the new visible: The opportunity that TikTok offers for the Vienna Tourist Board is not only to generate attention for sights or cultural offerings that are already known internationally. Rather, the platform helps to expand the image of Vienna and thus also what guests want to discover locally. That's why Vienna Tourism uses the reach of TikTok specifically to make the less obvious facets of Vienna accessible to a relevant audience. In this way, TikTok helps to create a more differentiated image of the destination: guests discover familiar things anew – and at the same time sides of Vienna that they might otherwise have missed.

Discovering More of Austria

Rather than just encouraging more people to head to Austria's most established or popular destinations, TikTok can broaden the range of places on people's radar in the first place, shifting focus off the beaten track.

Short-form content can surface somewhere new, somewhere unfamiliar. Smaller towns, regional foods or traditions, local events can all get some air time, and give people a reason to explore beyond the places they have already heard of.

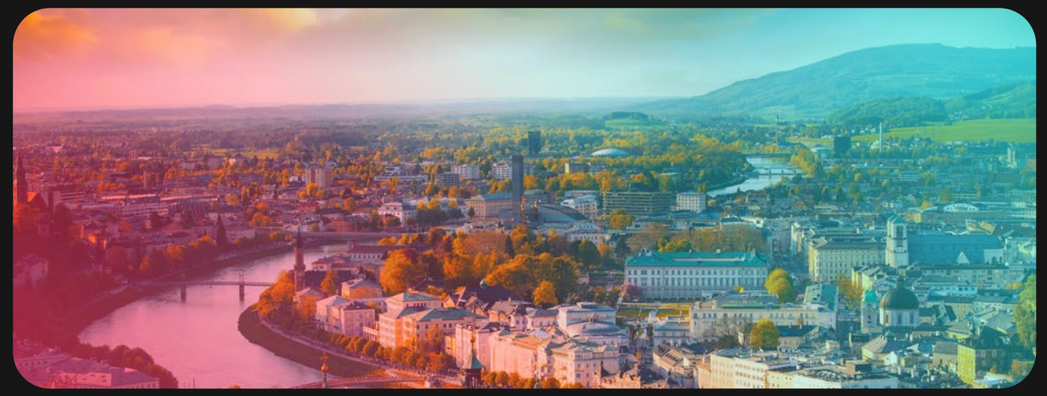
> **'I've used it to find local cafés in the area as I'm new here, and to see what local activities there are.'**
>
> *Woman, 20s, Local, recently moved to Salzburg*

Austria's tourist economy is deeply regional, and TikTok's routes to digital discovery makes the potential audience for these regions and the businesses within them much larger. Among Austrian businesses using TikTok, 60% say the platform has increased exposure for regionally focused products and services, including local products and tourism. Almost two-thirds (64%) say TikTok has helped them reach customers outside their immediate community.

Almost two-thirds

(64%) say TikTok has helped them reach customers outside their immediate community.

Greater visibility for lesser-known places can help spread tourist activity across a broader range of regions and businesses, rather than concentrating around the same established destinations.



IMMERSIVE RESEARCH

Salzburg: Beyond the Guidebook

Over two days in Salzburg, PF Global researchers spoke to 130 local residents, businesses, and visitors to understand the way TikTok is shaping how people experience the city. Several common themes emerged over the course of their conversations:

TikTok is helping people discover more of Salzburg. Locals, recent arrivals and tourists described finding independent cafés, shops, hiking spots and activities through the platform, including places outside their usual neighbourhoods or the established tourist circuit.

> **'I think for locals, using TikTok to find lake spots and hiking trails is the most Salzburg thing we do! It's good at directing those videos to you [...] I have videos with less than 100 likes and I know that is going to be a good spot. [...] I think it's the same as making conversation with someone at a bar and they recommend it to you.'**
>
> *Woman, 24, Salzburg resident*

Online discovery is translating into real-world visits and potential economic impact for local businesses. Interviewees connected TikTok and social media visibility with increased awareness and footfall, particularly for smaller independent businesses. In some instances, it's even expanding their audience on an international scale:

> **'There are those that come here and say they've discovered me, my shop, through TikTok. I've had tourists from South Korea come in and they tell me they've seen me on TikTok.'**
>
> *Salzburg shop owner, late 60s*

TikTok's role extends beyond tourism and businesses into culture, creativity and skills. Locals described using the platform for fashion, traditional Austrian clothing, arts and crafts, make-up, cooking and language learning, while others felt TikTok was helping bring new youth trends into Salzburg.

> **'Austrians love any excuse to wear Tracht [...] in the summer or around a holiday I see lots of Gen Z styling these into trends or showing how you can wear them in a modern way on TikTok.'**
>
> *Woman, 27, Salzburg resident*



Opening Access to Austria's Creative Economy

€29m in GVA for the Austrian creative sector in 2025.

TikTok's creative economy – spanning content creators, production activity and the services that enable them – supported €29 million in GVA for the Austrian creative sector in 2025.

But TikTok's contribution to the creative life of the country is more than the content produced directly on its platform. TikTok can also create new points of entry into Austria's existing cultural infrastructure, helping people to discover and engage with artists, institutions, events and performances across the country.

Culture That Finds Its Audience

For museums, galleries, and other cultural organisations competing for people's time and attention, TikTok provides another route to audiences who may not already be looking for them. 21% of Austrian TikTok users have discovered a museum through the platform, 16% a gallery, and 13% some form of cultural institution.

21%
of Austrian TikTok users have discovered a museum through the platform.

16%
of Austrian TikTok users have discovered a gallery through TikTok.

13%
of Austrian TikTok users have discovered some form of cultural institution.

Discovery, as established, is rarely the end of the story: 28% have gone on to visit a cultural festival, 34% a food festival, 27% a museum or gallery exhibition, and 21% a theatre, comedy or other performing-arts show after hearing about it on TikTok.

There is clearly a broader role for digital cultural content. Instead of a static post, this content can act as an open invitation to physical cultural experiences: entering a museum, joining a crowd at a festival, seeing a live performance. Digital is not a substitute for cultural participation, but a means of extending it.

From Recommendations to Readers: BookTok in Austria

Books are yet another example of cultural discovery via TikTok translating into economic benefit, but also wider cultural engagement.

More than one in five Austrian TikTok users (22%) say they have bought a book after seeing or hearing about it on TikTok, rising to 29% among 25–34s and 30% among 18–24s. 16% of Austrian TikTok users have discovered a new author whose books they now read.

More than one in five

Austrian TikTok users (22%) say they have bought a book after seeing or hearing about it on TikTok.

16% of Austrian TikTok users have discovered a new author whose books they now read.

BookTok helped turn online discovery into an estimated €38.7 million in revenue from TikTok-attributed book sales in Austria in 2025, supporting authors, publishers, bookshops and literary festivals. (MediaControl)

BookTok provides a clear example of cultural recommendation creating value beyond TikTok: helping readers find new books while supporting the businesses that sustain Austria's literary sector.

€38.7m in TikTok-attributed book sales in Austria in 2025, supporting authors, publishers, bookshops and literary festivals.

Making Austria's Musical Heritage More Discoverable

Few forms of culture are more closely associated with Austria than classical music. The challenge now, beyond preserving this cultural heritage, is continuing to introduce it to new audiences.

> **'We used TikTok as inspiration for the sorts of things we could see like the Mozart Geburtshaus [Mozart's birthplace] and the Mirabellgarten – they came up a lot in my feed.'**
>
> *Woman, 19, German Tourist*

TikTok creates additional means of introduction. A snippet of a performance, someone explaining the history behind a specific piece, a behind-the-scenes look at a historic venue. This content can reach people who would never have encountered it otherwise. TikTok's platform helped make Austria's classical music heritage more discoverable in 2025, turning short-form performances, creator-led education and cultural storytelling into €5.6m in additional revenue for musicians, venues, festivals, educators and cultural tourism.

€5.6m in additional revenue for musicians, venues, festivals, educators and cultural tourism.

New modes of communication do not have to displace older forms of culture. They can make them easier to encounter.

THE POTENTIAL OF LIVE

As well as its wider economic contributions (€14 million in GVA for Austria in 2025), LIVE offers cultural institutions another way to experiment with digital discovery, enabling them to bring aspects of their experience to audiences online where before they would have been entirely geographically bounded.

A number of Austrian museums and institutions are already making the most of the platform, using features to share virtual gallery walkthroughs, behind-the-scenes looks at collections, explanations of specific elements by curators – the Belvedere Museum in Vienna has its #MuseumMoment, the Albertina streams live performance art pieces.

But the value here is not in replacing the physical experience of visiting one of these sites. It's widening the point of entry, prompting those outside of the immediate vicinity to organise a trip, or those unable to physically travel to the site now to save the trip for later.



Keeping with Tradition: Austria's Culinary and Craft Economy

€30m in additional activity in 2025 across local food, design, craft, fashion, beauty and heritage-led products.

We estimate that TikTok helped Austrian makers, growers and traditional-product businesses generate an additional €30 million in activity in 2025 across local food, design, craft, fashion, beauty and heritage-led products.

There is more to Austria's cultural economy than its institutions or even its music. Regional food, clothing, crafts and customs also form a key part of Austria's cultural identity, and its economic footprint. Many of the businesses making up Austria's culinary and craft economy are very much rooted in specific places, and grounded by skills handed down between generations.

For these, maintaining tradition and sourcing new customers must be handled as joint aims, not one at the expense of the other. TikTok-driven discovery can help these locally linked products and services travel further, giving people outside the immediate community a glimpse into how something is made, where it comes from, and why that matters.

Helping Tradition Stay Visible (and Economically Active)

Much of Austria's culinary and craft economy is driven by family-owned, hyper-local specialist producers and self-employed creatives (for instance, Alpine cheesemakers or Wachau winegrowers). Without the resources of much larger organisations though, these businesses, and their traditional products and services, face greater pressure to engage new generations, and get savvy with digital marketing methods. TikTok is an accessible way for these traditional businesses to do just that.

More than half of Austrian TikTok users (53%) say they have purchased a traditional Austrian product after seeing it on TikTok, and 42% have used TikTok to learn about Austrian recipes specifically, with smaller but meaningful shares learning about Austrian customs (22%), clothing (17%) and crafts (16%).

45% of businesses using TikTok say it has helped them commercialise traditional products and crafts. TikTok also combines locally rooted businesses with high international exposure – 56% of TikTok-using businesses saying TikTok has helped them market internationally.

Local Legends, Wider Reach: TikTok and Austria's Rural Businesses

For Austria's rural businesses, place is frequently fundamental to the product. Their draw may stem directly from specific landscapes, local traditions or regional ingredients, but economic success can depend heavily on spreading awareness and engaging customers beyond its immediate area.

Businesses whose success depends on people opting to visit them, such as a rural hotel or tourism business, see this challenge more keenly. 62% of rural businesses surveyed have a physical location, and so the transaction is necessarily in-person – they need somebody to make a physical journey to them.

Half Among rural businesses with a customer-facing location, 50% say TikTok has increased the number of customers visiting them in person.

62% of rural businesses surveyed have a physical location.

TikTok can help turn online attention into exactly this form of physical demand. Among rural businesses with a customer-facing location, 50% say TikTok has increased the number of customers visiting them in person.

Greater visibility via TikTok more broadly can support both visitor-facing businesses with physical locations, and the producers, makers and traditions helping to give the region its distinctive identity. 60% of Austrian businesses using TikTok say the platform has increased exposure for regionally focused products and services, while 64% say it has helped them reach customers outside their immediate community.

Naturhotel Forsthofgut demonstrates how a deeply locally rooted rural business can build modern appeal without losing its connection to place. After more than 400 years its offer remains closely tied to the surrounding landscape and regional economy, from Alpine outdoor experiences to cuisine using products from the region and its own farm.



CASE STUDY

Naturhotel Forsthofgut: 'Another way to tell stories that have existed for more than 400 years.'

Naturhotel Forsthofgut has sat in the village of Leogang, nestled in amongst the Austrian Alps and surrounded by the Steinberge mountain range, for over 400 years. It has been run as a hotel since the 1960s, and is now managed by the fifth generation of the Schmuck family as a five-star, with 112 rooms and suites. The hotel positions itself as 'a place for everyone': families and couples, skiers in winter and hikers in summer, but increasingly a year-round destination.

The hotel now operates two separate TikTok channels: one for inspiring potential guests to make a booking, and the other dedicated to employer branding and recruitment outreach. Theresa, the hotel's Sales and Marketing Manager, says that TikTok has become especially important for reaching younger audiences on both sides (guest and employee):

> **'We've definitely seen that there's more demand, especially from the younger target group that's becoming more and more important for us.'**

That demand is already extending beyond Austria, as the hotel increasingly attracts guests from the UK and US as well as across Austria, Germany and Switzerland. Video and carousel content on the platform let the team convey 'the all-round Forsthofgut experience', in ways which more static platforms fail to enable, and the value of this full-look is not wasted on the team:

> **'Being able to show the products we have in the house – whether that's the spa and wellness side, or culinary- and to share the authentic insights into everyday working life via TikTok, for example, is absolutely essential for us going forward.'**

The platform is also helping the hotel with its recruitment, using TikTok to give prospective employees a more authentic view of everyday working life at Forsthofgut. Julia, the hotel's HR Manager, says TikTok has become indispensable in recruiting, as it can achieve the greatest reach.

For a business with such a long and storied history, Theresa frames TikTok as 'one more way to tell stories that have existed for more than 400 years.'

The opportunity is not turning local traditions into mass-market products. In many cases, the value of these traditions derives from being distinctive, specialist and rooted in place. TikTok can help widen the audience for those traditions while allowing the businesses behind them to retain their local, specialist identity and story.



Methodology & Appendix

Consumer & Business Surveys

PF Global conducted two independent, anonymous online surveys in Austria.

A consumer survey of 2,039 adults from 4th and 30th August 2026. Participants were allowed to take part if they were aged 18+ and lived in Austria. Quotas and weighting were employed to ensure a representative balance of age/gender groups (e.g. male 18-24), region and education level.

A business survey of 505 business decision makers from 4th August to 9th September 2026. Participants qualified if they were a manager or above in a private sector business and both they and their business were based in Austria. Quotas and weighting were used to ensure a representative sample based on region, business sector and company size. Targets were based on the proportion of workers in the country who are employed by each type of company, rather than the raw number of enterprises falling into each. Using TikTok was not a requirement of the survey.

Sample in both cases was sourced via a wide range of generalist and specialist survey panels. Participants were incentivised for their time and the topic of the survey was not shown to people in advance to prevent it affecting results.

Gemeinde-level results have been derived via MRP analysis. Multilevel Regression and Poststratification (MRP) is a statistical technique that combines the results of polls with public information such as census or business data. This allows us to create estimates of the results of survey questions in smaller locations such as Gemeinden (municipalities) without requiring the sample sizes that would be required for this level via traditional polling. Findings at the Gemeinde level that are modelled from polling are based on MRP analysis.

Qualitative & Immersive Research

PF Global conducted in-depth interviews with Austrian businesses and creators to understand the role of TikTok in their work and wider industry. We also carried out immersive research conducted across Salzburg, with 130 interviews recorded.

2,039

Austrian adults surveyed, 4–30 August 2026.

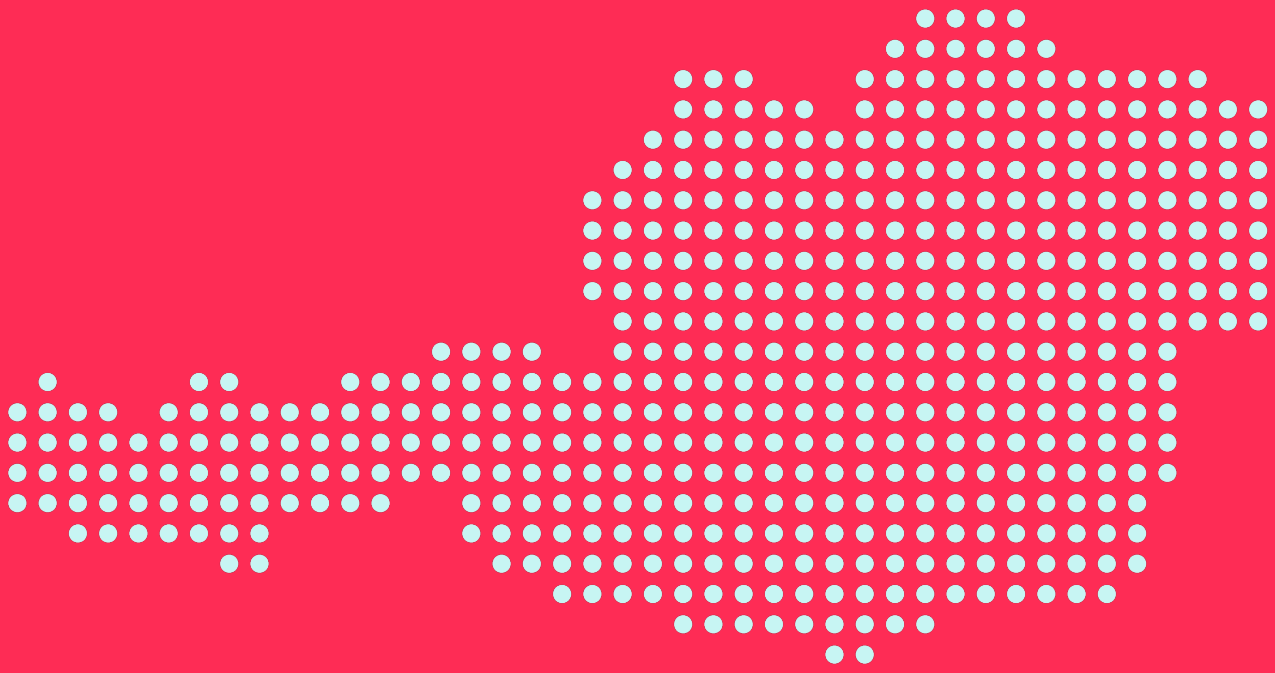
505

Austrian business decision makers surveyed, 4 August – 9 September 2026.

ECONOMIC MODELLING

CLAIM	METHODOLOGY
Economic Impact of TikTok - GVA & Jobs	We derive TikTok's advertising revenue from the filed turnover of TikTok Information Technologies UK Ltd at Companies House, which covers TikTok's European, Latin American and African markets. We adjust for the advertising share of turnover from its last disclosed revenue breakdown, and allocate this to Austria based on its share of social media advertising spend across the entity's markets. As 2025 accounts are not yet filed, we grow the 2024 estimate forward using growth in Austrian social media ad spend. We validate this against an estimate of TikTok's global share of social media ad spend, applied to the Austrian market. We apply a Return on Advertising Spend (ROAS) multiplier sourced from NielsenIQ to estimate the total business revenue generated from advertising on TikTok. We convert this business revenue into direct GVA using a revenue-to-GVA ratio weighted across advertiser-facing industries, and capture indirect (supply chain) effects using Type I GVA multipliers derived from Eurostat's symmetric input-output tables for Austria. The advertiser basket is weighted by each industry's turnover (Eurostat Structural Business Statistics) and its rate of paid social media advertising (Eurostat survey on ICT usage in enterprises). Induced effects are not included. We add two further revenue streams. For TikTok Shop, we apportion third-party estimates of global TikTok Shop gross merchandise value to Austria by its share of TikTok users (DataReportal), discounted for recently launched markets using observed European Shop sales. We convert this to GVA using economy-wide revenue-to-GVA ratios and Type I multipliers from the same Eurostat tables. For TikTok LIVE, we use TikTok's own 2025 LIVE revenue for Austria, net of app store fees, and apply a creator revenue share to estimate creator earnings. We convert this to direct GVA using the GVA-to-output ratio of the creative, arts and entertainment sector; no supply chain multiplier is applied, as individual creators make few intermediate purchases. All GVA figures are at basic prices. We then estimate the equivalent jobs supported by dividing total GVA by output per worker in Austria, using World Bank data on GDP, labour force and unemployment.
Economic Impact of TikTok for SMEs	We estimate the share of TikTok-attributed GVA accruing to small and medium businesses in Austria. We weight Eurostat business turnover by enterprise size class (Structural Business Statistics) by the share of firms in each size class that use social media (Eurostat survey on ICT usage in enterprises). We apply this share to the Ads and Shop GVA estimates.
Economic Impact of TikTok on Exports	We use PF Global business survey data to estimate the share of TikTok-using businesses that agree TikTok has helped them sell across international borders. We apply this to TikTok-attributed business revenue from advertising and Shop, and adjust for the share of revenue at these firms that is exported, using OECD Trade by Enterprise Characteristics data on export intensity.

CLAIM	METHODOLOGY
Economic Impact of TikTok's Creative Ecosystem	We estimate TikTok's contribution to two creative sectors in Austria: film, video and broadcasting, and advertising. For each sector, we estimate its total contribution to the economy using Eurostat national accounts data on sector-level GVA. We then apply proxies for TikTok's share of each sector's GVA. For film, video and broadcasting, we use TikTok creator revenues as a share of sector output, derived from TikTok's revenue in the advertising model above, the LIVE share of TikTok revenue, and a creator payout rate benchmarked to industry standards. For advertising, we use TikTok's ad revenue as a share of the total advertising market, using IAB Europe AdEx Benchmark data.
TikTok and Austria's classical music heritage	Using PF Global survey data, we derive the share of adults in Austria with a TikTok account who discovered classical, opera or orchestral performances on TikTok, for whom this discovery was new, and who then bought a ticket. We scale this to the adult population using Statistik Austria data, conservatively assuming one visit each. We apply average ticket revenue per visit, derived from the annual reports of the Bundestheater-Holding and the Wiener Konzerthausgesellschaft.
TikTok and Austrian traditional products	We start from the business revenue generated by TikTok advertising in Austria, estimated above. We apportion this to traditional product businesses using the share of consumer-facing turnover accounted for by small and medium-sized craft, food and drink producers, weighted by each industry's adoption of internet advertising, using Eurostat Structural Business Statistics and the Eurostat survey on ICT usage in enterprises.
Incremental Consumer Expenditure	We use PF Global data on the number of purchases made by adults in Austria that they attribute to TikTok, and scale this to the adult population using Eurostat population statistics. We apply survey estimates of how much respondents spent, split by activity, and adjust for additionality using responses on whether they would have made the visit without TikTok.
Training & Self Serve Tools	Using PF Global business survey data, we compare how long businesses report a typical piece of advertising content takes from conception to public release on TikTok against comparable social platforms. We then estimate the average reduction in production time across the six markets. We combine this with our modelled estimates of SME advertising cost in Austria to construct counterfactual spend under the platform average, and calculate the resulting business savings.
TikTok User Segments	We segment TikTok users using a series of questions asked on a continuous scale from PF Global consumer surveys. We centre each respondent's ratings on their own average, so segments reflect relative priorities rather than overall enthusiasm for TikTok. Principal components analysis on pooled data across the six markets identifies three underlying motivations: entertainment, participation and information. Each user is assigned to the motivation they score highest on, and participation-led users are split by intensity of use into Participants and Community Builders. Shares are weighted to be representative of TikTok users in Austria.



PF Global

Advice | Research | Argument

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