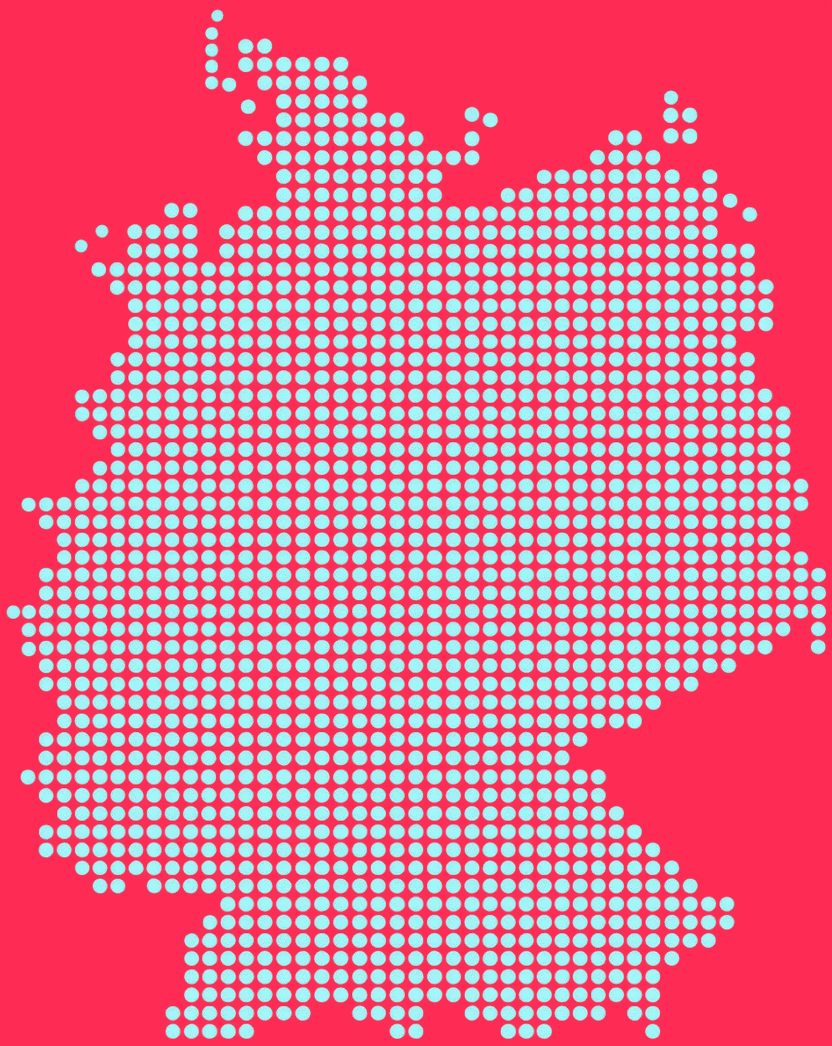
Discover. Create. Grow.

How TikTok turns online discovery into real-world growth for German businesses, creators and communities.



PF Global
Advice | Research | Argument

2026

CONTENTS

00 Executive Summary — p. 4

01 How TikTok Drives Economic Growth in Germany — p. 14

02 Supporting the Spine: Boosting Germany's Small & Medium-Sized Businesses — p. 24

03 Tackling the Fachkräftemangel: Skills, Learning & the Labour Market — p. 30

04 Sector Spotlights — p. 40

05 Supporting Culture & Community — p. 50

06 LIVE in Germany — p. 56

07 Methodology & Appendix — p. 62

ABOUT THE RESEARCH

To better understand TikTok's impact across the German 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:

2,025 German adults (including 66 Professional and 474 Casual Creators)

513 German businesses

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

125+ people interviewed on the record in immersive research at the 2026 Frankfurt Book Fair.

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

Every month, 28.9 million people across Germany come to TikTok 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 clip from a regional cultural event can turn into a weekend away. A practical skills tutorial, a glimpse into a local business or a LIVE conversation 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 Germany's economy, generating €5.5 billion in gross value added (GVA) and supporting 52,000 jobs across the country in 2025. Behind that impact is a story: a creator who has turned a hobby into a business, a family-owned manufacturer reaching new customers, a local company attracting its next generation of skilled employees, or a neighbourhood restaurant 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 Germany's Mittelstand, this means combining long-standing expertise and local relationships with new ways to reach customers, compete at scale and attract talent.

That effect is being felt across the economy. In music, TikTok helps artists find audiences and fans find new songs. In fashion and beauty, it helps trends travel and brands break through. In tourism and hospitality, it helps people discover places they might never otherwise have visited. And through TikTok LIVE, people are learning new skills, connecting with communities and finding opportunities to take part in local events and activities.

I am proud of the partnerships we have built across these sectors and proud of the creators who bring Germany's diverse cultural life 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, strengthening the businesses and skills that underpin the German economy.

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 German economy and culture, and are committed to growing that contribution even further, supporting German creators, empowering the Mittelstand and helping businesses of every size reach the people who matter most.



CYNTHIA SANFILIPPO
President, Europe

Germany is one of TikTok's most active EU markets, with 28.9 million monthly active users. These users visit the platform to engage with a wide variety of content, from entertainment and discovering books and new activities, through to learning new skills, accessing educational content and supporting their job search.

TikTok is also becoming increasingly important for German businesses. Across sectors such as manufacturing, consumer goods and transportation, around 4 in 10 (38%) businesses use the platform, with 74% of these expecting their use to grow over the next year. For many, that use already goes beyond marketing into recruitment. As well as boosts in sales and revenue as a result of their TikTok use, one in three businesses using TikTok (33%) say they have hired new people as a result of being on the platform.

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 included €7.2 billion of economic output in Germany. This analysis captures not only the direct activity enabled by TikTok, but also knock-on effects generated across businesses and 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 (gross value added, or GVA) and the jobs supported as a result. This allows us to estimate the value that TikTok is adding to national economies at a more granular level.

PF Global finds that by taking TikTok's app, TikTok Shop and TikTok LIVE together, TikTok contributed an estimated €5.5 billion in GVA to the German economy in 2025, supporting 52,000 jobs, more than twice as many as the entire brick-and-mortar bookstore industry in Germany in 2025*.

This report goes into the detail of TikTok's impact on the German economy, focusing on both its importance for small and medium-sized businesses (the Mittelstand) and the wider impact on German cultural and economic sectors.

€5.5bn in GVA generated for German businesses by TikTok in 2025.

52k jobs supported across Germany.

74% of German businesses using TikTok say it has helped them grow their sales and revenue.

*Börsenverein des Deutschen Buchhandels (2025), Buch und Buchhandel in Zahlen 2025, Table 58: Beschäftigte im Einzelhandel mit Büchern 2020–2024. Source data: Statistisches Bundesamt.



Discovery Translates to Real-World Demand

Through TikTok, people discover businesses, products, places and experiences that they may not have actively searched for. Crucially, this discovery frequently leads to action: 38% of German TikTok users say they have visited a café or restaurant in their local area after hearing about it on TikTok, while 28% have visited another town or city in Germany.

38% of German TikTok users say they have visited a café or restaurant in their local area after hearing about it on TikTok.

28% of German TikTok users have visited another town or city in Germany after hearing about it on TikTok.

TikTok Provides German Businesses New Routes to Growth

Among German businesses using TikTok, 82% agree that it allows them to reach customers they would otherwise be unable to reach, and 74% say TikTok has helped them grow their sales and revenue. Around three-quarters (75%) agree that the platform allows independent businesses to compete with global brands.

82%

of German businesses using TikTok agree that it allows them to reach customers they would otherwise be unable to reach.

74%

say TikTok has helped them grow their sales and revenue.

Around three-quarters

of German businesses using TikTok (75%) agree that the platform allows independent businesses to compete with global brands.

Businesses Are Using TikTok to Create Opportunities for Germany

For some businesses, this growth is already feeding through into employment. One in three businesses using TikTok (33%) say they have hired new people either to support their use of TikTok or to service additional business generated through the platform.

Of these businesses, 42% also advertise vacancies directly on TikTok, and half (50%) maintain that the platform has helped them attract younger employees – this is particularly important for a country currently grappling with skilled labour shortages (Fachkräftemangel) across its trades and the Mittelstand.

One in three

businesses using TikTok (33%) say they have hired new people either to support their use of TikTok or to service additional business generated through the platform.

42%

of these businesses also advertise vacancies directly on TikTok.

50%

maintain that the platform has helped them attract younger employees.

A Key Tool in Supporting the Mittelstand

Small and medium-sized businesses (SMEs) in Germany form a key part of the Mittelstand (backbone/spine of the German economy, loosely defined as individual or family owned). They constitute 99% of all companies in Germany. In 2024, there were 3.2 million SMEs across the country, accounting for over half (54%) of employment. For these firms, growth does not mean becoming a 'new' kind of business, but instead finding improved ways of reaching their customer base and prospective customers, explaining what makes their business stand out, and effectively competing with larger companies for visibility and discovery.

TikTok can support these processes by reducing some of the recurring barriers for Mittelstand businesses. 80% of German businesses using the platform agree that it speeds up the pace at which SMEs can grow and scale, and 82% say it allows them to reach customers they would otherwise struggle to capture.

80%

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

62%

of those using TikTok say it has helped them advertise nationally without a large budget.

The reach enabled by TikTok is also key for smaller firms to stay competitive. Around three-quarters of businesses using TikTok agree that it enables them to compete with global brands, especially when it comes to reconciling the mismatch of marketing budgets. 39% of all businesses say TikTok has helped them reach customers outside of their local area, and 62% of those using TikTok say it has helped them advertise nationally without a large budget.

For regional producers, family businesses or specialist manufacturers, digital reach can nicely complement their local relationships and expertise to keep them in the game.

€1.5bn **in GVA supported for German SMEs in 2025.**

Sharing Culture & Strengthening Communities

TikTok also plays a role in how people encounter and participate in German cultural life. Almost half (48%) of German TikTok users say the platform has helped them to engage more in Germany's cultural life, traditions and events from across the country. In this way, TikTok helps regional and culturally specific content reach audiences beyond its originating communities.

Almost half of German TikTok users (48%) say the platform has helped them to engage more in Germany's cultural life, traditions and events from across the country.

This sense of connection is also supported by TikTok's LIVE function. Among surveyed TikTok LIVE users, 51% say watching LIVE has helped them feel more connected to a community. Almost half (46%) say it has helped them learn new skills or gain knowledge, while one in three say it has led them to join a local community event or hobby group.

Among surveyed TikTok LIVE users, 51% say watching LIVE has helped them feel more connected to a community.

What TikTok LIVE users say LIVE has helped them do

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026



This illustrates a key part of TikTok's wider impact: digital engagement does not necessarily remain digital. TikTok can support cultural discovery and community participation online, while encouraging people to engage with people, places, and activities beyond the screen.

TikTok's Impact in Germany

€5.5bn

GVA generated for German businesses

€5.5 billion in GVA generated for German businesses by TikTok in 2025.

€1.5bn

GVA supported for German SMEs

€1.5 billion in GVA supported by TikTok for German SMEs in 2025.

€1bn

German exports enabled

€1 billion in German exports enabled by TikTok-driven exposure.

52k

Jobs supported across Germany

52,000 jobs supported across Germany.

82%

Reaching new customers

82% of German businesses using TikTok say it lets them reach customers they would otherwise be unable to reach.

74%

Growing sales and revenue

74% of German businesses using TikTok say it has helped them grow their sales and revenue.

€810m

Additional expenditure from footfall

€810 million in additional tourism, retail, hospitality and services expenditure from TikTok-driven footfall.

33%

Hiring as a result of TikTok

33% of German businesses using TikTok say they have hired new people as a result of the platform.

€125m

GVA generated by LIVE

€125 million generated in GVA for businesses in Germany by LIVE in 2025.

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



How TikTok Drives Economic Growth in Germany

€5.5bn
in GVA for businesses in Germany in 2025.

52k jobs
supported across Germany.

74%
of businesses using TikTok say it has helped them grow their sales and revenue.

52,000 jobs supported across Germany

Direct and indirect jobs supported by TikTok in 2025

PF GLOBAL ECONOMIC MODELLING, 2026



Discovery to Demand

Businesses are not simply building an audience via TikTok. They are using the visibility this audience affords them to generate real demand. Among German businesses using TikTok, 82% say the platform allows them to reach customers they would otherwise be unable to reach. The benefits go beyond outreach. Around three-quarters (74%) of businesses using TikTok say it has helped them grow their sales and revenue.

The opportunity is particularly relevant for businesses without the scale or marketing resources of the biggest brands. Three-quarters of businesses using TikTok agree that the platform allows independent businesses to compete with global brands.
TikTok gives businesses another path to growth: one where strong products, services and stories can reach a large audience without having to already be a household name.

82%
of German businesses using TikTok say the platform allows them to reach customers they would otherwise be unable to reach.

74%
of businesses using TikTok say it has helped them grow their sales and revenue.

New Routes to Growth for Businesses

Higher demand supports activity not only within the business itself, but across the whole supply chain and services it relies on – from logistics and production to marketing and professional services.

Growing businesses may also bring on new hires, boosting local employment opportunities. One in three businesses using TikTok (33%) say they have hired new people as a result of the platform, whether to support their use of TikTok or to meet higher demand for their services.

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Room for New Ideas

Growth does not always stem from selling more of the same products. The exposure and greater marketing capabilities which TikTok offers to German businesses can also give them the confidence and real-time feedback from potential customers to experiment with new ideas, products and services.

Among German businesses using TikTok, nearly a quarter (24%) have launched new products as a result of the platform, and 35% say TikTok has helped them come up with a new business idea.

Some of this may stem from the opportunity to assess appetite or reception on a local, national and global stage via TikTok, before having to fully commit to a new proposition.

24% of German businesses using TikTok have launched new products as a result of the platform.

35% say TikTok has helped them come up with a new business idea.

Organic Exposure via the Ecosystem

Businesses can benefit from TikTok even when they are not the ones creating the content. Customers, creators and other users can bring a business to a much wider audience, even just by talking about it.

Around two in five (39%) German businesses say they have been featured positively in a TikTok video. 83% believed that being featured positively on the platform would increase their sales in both the short and long term, 89% that it would help them to reach new customers, and 55% that it would increase footfall at physical locations.

Around two in five German businesses (39%) say they have been featured positively in a TikTok video.



Nearly 7 in 10 businesses (69%) believe TikTok exposure would help them reach new customers.

All German businesses surveyed

PF GLOBAL SURVEY OF GERMAN BUSINESSES, 2026



The impacts can spread beyond online sales. 55% of businesses believe that positive TikTok exposure would increase footfall at their physical locations, while 58% of businesses using TikTok say that it has already made it easier for them to increase footfall or bookings.

58% of businesses using TikTok say that it has already made it easier for them to increase footfall or bookings.

From Discovery to Scale

For many smaller businesses, organic exposure is the low-cost door opener: a way to reach new audiences and test which products, messages and formats resonate. But once something is shown to work, TikTok also offers the paid advertising and tools to scale this reach further.

The wider TikTok ecosystem can create value for businesses whether they are actively posting themselves, scaling discovery through paid advertising, or simply becoming part of conversations taking place on the platform.

Extending and Strengthening International Reach

For businesses attempting to enter a new market, a key barrier is reaching potential customers in the first place. TikTok cannot necessarily remove the practical components of exporting, but can make international demand easier to build and reduce the time between international customers discovering a German product and buying it.

That international reach is already visible in the audiences businesses are building on TikTok. Among German businesses using the platform, 55% report gaining followers from Austria, 47% from France, and 40% from the US.

€1bn

This kind of exposure drives results for businesses. Our modelling estimates that TikTok-driven exposure enabled €1 billion in German exports.

Among German businesses using the platform, 55% report gaining followers from Austria, 47% from France, and 40% from the US.

Where German businesses using TikTok report gaining followers

PF GLOBAL SURVEY OF GERMAN BUSINESSES, 2026



The Impact of TikTok Shop

For businesses already selling through TikTok Shop, the link to cross-border commerce is more direct. 80% agree that Shop has eased the process of selling products and services across international borders, and 72% agree that it has enabled them to sell to other EU countries.

TikTok Shop's impact is not limited only to its international sales capacities. 84% of German businesses using Shop say it has helped grow their sales and revenue, while 77% say it has enabled them to reach customers they could not access through physical retail. For businesses without extensive networks, TikTok Shop is opening up a whole new route between discovery and sale.

84% of German businesses using Shop say it has helped grow their sales and revenue.

German businesses using TikTok Shop who agree that Shop has...

PF GLOBAL SURVEY OF GERMAN BUSINESSES, 2026



Shop can also support businesses in their overall strategy, particularly when considering which products or services they would like to move into next: 78% say it has allowed them to launch new products or services. 81% say Shop gives them better information about what their customers want, and 77% agree that it provides more comprehensive detail on spending habits and trends to feed into their planning.

Highlighting German Products and Services

TikTok can bring German businesses and their products into the spotlight. 82% of German businesses using TikTok agree that the platform provides increased exposure for German-made products and services.

It is not just established national brands which can benefit from this enhanced visibility. TikTok also increases the exposure of regionally focused products and services (72% of businesses using TikTok agree), including local goods and tourism-related services. For a country with 16 states, each with its own regional culture and products, being able to establish these regional identities is especially key.

For many businesses, the visibility afforded by TikTok has already become commercially important. Almost a quarter say that they would lose business if TikTok disappeared (24%).

For Germany's Mittelstand, populated heavily by regional producers and specialist manufacturers, the visibility which TikTok can enable is particularly valuable. A business does not need to become a household name everywhere, but it does need to be discovered by the people who might buy what it offers. TikTok can help German products and services travel further and more effectively to these people.

82% of German businesses using TikTok agree that the platform provides increased exposure for German-made products and services.

72% of businesses using TikTok agree that TikTok also increases the exposure of regionally focused products and services.

Almost a quarter say that they would lose business if TikTok disappeared (24%).

The Creator Economy

For some users, creating content through TikTok becomes an economic opportunity in its own right – the benefits are not constrained to purely business.

Our survey finds that three in five (60%) adult users have posted on TikTok themselves, which includes a small group of professional content creators alongside everyday users earning additional income through TikTok and TikTok LIVE. For some, this offers a flexible way to supplement their income alongside study, part-time work or caring responsibilities.

But this economic potential extends beyond creators themselves. Content production can involve other businesses and brands, and creators can help businesses and brands reach new audiences with their products and services. Creator activity forms just one part of a wider economic ecosystem around TikTok, but an increasingly key one.

28.9m monthly active users.

Three in five adult users (60%) have posted on TikTok themselves.



Supporting the Spine: Boosting Germany's Small & Medium-Sized Businesses

Small and medium businesses are the backbone of Germany's economy. In 2024, the Mittelstand included 3.2 million small and medium-sized enterprises, accounting for 99% of all companies and 54% of jobs in Germany.

€1.5bn

in GVA supported for small and medium-sized businesses in Germany.

40%

of family-owned businesses say TikTok has helped them promote their products and services nationally.

80%

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

There is significant overlap between the Mittelstand and Germany's 'Hidden Champions'. These champions are classified as market leaders in niche fields, and Germany houses a large proportion of them, particularly in industrial tech and traditional manufacturing. These champions are also closely tied to regions: for instance, Bavaria hosts automotive, mechanical engineering, and precision manufacturing; Baden-Württemberg machinery and automotive; North Rhine-Westphalia dominates chemicals and steel; Hesse concentrates on financial services and pharmaceuticals.

But Germany's champions and SMEs are coming under increasing pressure. The push to embrace new ways of doing business (particularly digitisation) and find new ways to recruit the skilled labour they need is currently exacerbated by the Fachkräftemangel – a skills shortage across Germany.

The rootedness of the Mittelstand in family-owned business can mean a lag in digital adoption, while the smaller size and turnover of SMEs can translate to difficulty building an audience due to lower marketing budgets and capacity and, with this, lowered ability to test strategies and iterate.

TikTok is playing an important role here by reducing the costs and time it takes for businesses to reach customers. This includes paid advertisements, but also organic content, LIVE streams and selling directly through Shop, and for some even supporting recruitment.

Increasing the Visibility of Hidden Champions

Manufacturing and other traditional firms can find a new lease of life via TikTok. Short-form video can be a useful format for specialist businesses to explain what they do, giving them a way to demonstrate how a product works, show the people and processes behind it, or to explain complex technical ideas that would not be easily conveyed via more traditional advertising approaches.

Over a third (35%) of businesses say TikTok helps them explain complex products and services to new audiences. This rises to 38% for artisan businesses. Understanding what these companies have to offer is often a key step towards a sale.

Over a third of businesses (35%) say TikTok helps them explain complex products and services to new audiences.

38% of artisan businesses say TikTok helps them explain complex products and services to new audiences.



Making Marketing More Accessible

14% **The training and self-service tools on TikTok and TikTok Shop reduce the production time for advertising content by 14%, equivalent to €22 million in potential productivity gains for German small and medium-sized businesses.**

With these time and associated cost savings, TikTok is helping to lower the barrier to entry for comprehensive digital marketing. 42% of German businesses say TikTok has helped them build a stronger online presence, while 38% say it has helped improve their digital marketing capabilities.

TikTok is not replacing other marketing channels, but can give smaller businesses a way to increase their visibility without needing the scale of resources or established brand recognition of larger competitors.

42%

of German businesses say TikTok has helped them build a stronger online presence.

38%

say it has helped improve their digital marketing capabilities.

Removing Geographical Barriers

For smaller and regionally-focused businesses, growth can be dependent on reaching customers beyond their existing pool. TikTok can help SMEs extend their reach beyond immediate and local markets, without breaking the bank – 39% of German businesses say TikTok has helped them promote products and services nationally without large advertising budgets.

This is particularly important for businesses based outside of Germany's largest cities (e.g. away from Frankfurt, Munich and Berlin). Where businesses in smaller towns or rural areas may traditionally rely on local reputation, online audiences are not so limited by geography.

TikTok can help bring a regional product or traditional business to people who otherwise would have little reason to encounter it. One in five (20%) businesses in these areas say TikTok helps them commercialise traditional products and crafts. For these companies, digital reach can act as a complement to their strong local footprint, helping cultural and traditional products travel while the business keeps its roots in the places and expertise which shaped it.

A company that previously had to rely heavily on local awareness or word of mouth only can now use TikTok to reach customers across Germany and beyond, giving high quality products and concepts the opportunity to travel far beyond their former reach.

One in five businesses in these areas (20%) say TikTok helps them commercialise traditional products and crafts.

39 % of German businesses say TikTok has helped them promote products and services nationally without large advertising budgets.



Responding Faster to Demand

Reaching a wider audience is only one of the perks TikTok brings to its business-user base. The platform can also help businesses to understand more rapidly how ideas are landing with customers, and to therefore adjust their products and strategy in-line with real-time market information. 36% of German businesses say TikTok has helped them test ideas and respond to customer demand more quickly.

This creates an incredibly useful feedback loop for businesses, allowing them to experiment with presentation of products and services to resonate most exactly with their customer base. For SMEs this is especially important, enabling them to learn quickly without the costs of extensive trial and error, and concentrating more resources behind successful ideas.

TikTok's contribution to SMEs extends beyond providing an additional advertising channel. It gives these companies more opportunity to get their good ideas in front of customers, and to turn this exposure into growth.

36% of German businesses say TikTok has helped them test ideas and respond to customer demand more quickly.



Tackling the Fachkräftemangel: Skills, Learning & the Labour Market

Businesses need more than new customers – they need the right people, with the right skills, in the right roles. For smaller firms already competing with larger employers for workers, this is particularly important in the context of Germany's Fachkräftemangel (skilled labour shortages).

420k

TikTok Search could help improve labour market matching in Germany by making job opportunities, career pathways and vocational routes easier to discover — supporting 420,000 job and training opportunities discovered through TikTok in 2025.

Germany's labour-market challenge is not just a shortage of people. It is a shortage of skills and the resultant persistent gaps across particular occupations and regions, especially in technical, vocational and industrial roles. But there is also a lack of effective matching of people to roles where their skillsets are in demand.

TikTok can support both sides of this equation (skills and matching) by helping users build and practise skills useful to working life, and by exposing people to opportunities they had not previously considered. Almost a third (32%) of German TikTok users say that TikTok helped them to discover new career paths, including vocational, industrial and public-service oriented roles. This is particularly true of younger users: 48% of 18-24 year olds and 46% of 25-34 year olds. The following sections take these two mechanisms in turn.

Almost a third (32%) of German TikTok users say that TikTok helped them to discover new career paths, including vocational, industrial and public-service oriented roles.

Share of German TikTok users who say TikTok helped them to discover new career paths, by age

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026



Learning That Translates into Working Life

TikTok is not purely for entertainment. 42% of German TikTok users say they often or almost always learn something new when they use the platform.

In Germany, TikTok users spend around 31 million hours each week learning from educational and skills-based content: this equates to roughly one hour a week of informal learning per average user. If effectively translated into work-relevant skills, this learning could unlock the equivalent of €1.7 billion in productivity-enhancing knowledge gains. For some users, this learning is already feeding into their working lives: one in five TikTok users say they have learned a new skill on TikTok that was useful in their existing job. Around 11% have learned a skill that helped them to switch careers, and 11% into a new job or role.

42% of German TikTok users say they often or almost always learn something new when they use the platform.

31m hours each week spent by TikTok users in Germany learning from educational and skills-based content.

€1.7bn in productivity-enhancing knowledge gains could be unlocked if this learning is effectively translated into work-relevant skills.

20% of TikTok users say they have learned a new skill on TikTok that was useful in their existing job.

Share of German TikTok users who have learned a skill on TikTok that...

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026





CHAPTER 03 · SKILLS, LEARNING & THE LABOUR MARKET.

Tackling the Fachkräftemangel

For employers, filling the gaps left by the Fachkräftemangel is largely a question of visibility. Possible recruits cannot consider a career they have never encountered, or that they do not yet understand. This is prevalent in the technical, vocational and industrial areas, where job titles alone may give younger people little sense of what the work actually involves.

TikTok creates the opportunity to reach people (especially younger people) before their career choices have narrowed, and for young people to envision alternative career paths for themselves. In our business survey, 56% agreed that TikTok helps them reach younger people who would not otherwise have considered a career in their industry, and 52% say it has helped reach potential employees that traditional recruitment channels would have missed.

56% of businesses agreed that TikTok helps them reach younger people who would not otherwise have considered a career in their industry.

52% say it has helped reach potential employees that traditional recruitment channels would have missed.

The story of Vögel Energie Bad Wärme in the Allgäu shows what TikTok can do for a regional employer.



CASE STUDY

Vögel Energie Bad Wärme

Making the Trades visible to a new generation · Martin Vögel, Managing Director

As a family-run, local trades business in the Allgäu, recruitment is a particularly acute challenge for Vögel Energie Bad Wärme (VEBW). With a serviced area of around 30 kilometres, VEBW have provided heating, plumbing, air conditioning and electrical services to their region in some form since 1931. Business was traditionally conducted and brought in via vehicle and newspaper advertisements, posters, and word-of-mouth. When Managing Director Martin Vögel sought to address the dearth of young recruits, he realised these channels were not necessarily going to cut it. In 2022, he opened a TikTok account for the business:

> **'TikTok was exactly the platform where the young people were. We wanted to say: come and have a look at the trades. It can actually be a lot of fun.'**
>
> *Martin Vögel*

The first video posted from the VEBW account was a spontaneous clip of colleagues sitting together after work. Within an hour, Vögel recalls, it had reached around 10,000 views – a shock, compared with the hundred or so views the business had been used to seeing online. Since this, the company has kept focusing on the personalities, humour and daily working lives of the team, allowing recruits to see what life at VEBW was actually like before ever walking through the door/ considering the trades for the first time.

The impact of TikTok became particularly visible during a late 2023 recruitment campaign, which combined more traditional advertising with TikTok as a central pillar of online activity. Vögel says the business was able to fill five vacancies, including difficult-to-fill roles, within about eight weeks. This cannot all be attributed to TikTok, but Vögel maintains that the platform was key to their visibility among younger workers.

It has also changed the earlier stages of their recruitment pipeline, with numerous enquiries from young people seeking internships/work experience. This matters in the German skilled trades ecosystem, where building out a solid base of future tradespeople remains incredibly crucial to the future of the sector.

The benefits for VEBW extend beyond recruitment too. Younger customers and prospects are increasingly mentioning the company's videos/internet presence when approaching them. Vögel believes this sustained online footprint has helped to keep the business in mind for locals; his main goal:

> **'The goal for a trades business is to build reach in its region and become better known. TikTok is very good for that.'**
>
> *Martin Vögel*

In an industry where businesses need to persuade the next generation that skilled trades offer worthwhile careers, showing the people, humour and working life behind the company has helped turn online familiarity into applications, internships and local recognition.

Exploring Trades and Vocations via TikTok

Some occupations are difficult to understand based on job adverts alone. For skilled trades and technical roles in particular, visibility (i.e. showing what the work actually looks like) can make an unfamiliar career easier to picture and more tempting to join.

Vögel Energie Bad Wärme illustrates this well. Its most effective recruitment content is not a cold list of qualifications or salaries, but rather its relaxed glimpses behind the scenes, and humorous introductions to the current team.

However, the opportunity also extends past businesses actively recruiting. Potential employees also stand to have their horizons opened up by TikTok – 31% of German TikTok users have seen content or campaigns encouraging people into technical roles. Discovery can happen before someone even reaches the actively-looking-for-a-job stage, widening the range of careers they might consider in the first place.

31% of German TikTok users have seen content or campaigns encouraging people into technical roles.

Widening Access to the Trades

Making different kinds of careers visible is only part of the challenge. People, especially those traditionally excluded from certain career pathways, may need help picturing themselves doing the job.

This is true of Germany's skilled trades and technical occupations, where women remain underrepresented. 28% of German TikTok users have spotted campaigns specifically encouraging women to join technical careers. Among women who encountered this content, a third went on to apply for, or considered applying for, a technical role.

Employers are one part of this story. Creators can provide a different kind of visibility, showing what jobs or careers look like through the eyes of someone actually doing it. Rather than presenting a trade as an abstract or unachievable option, they can make the work feel real and even familiar.

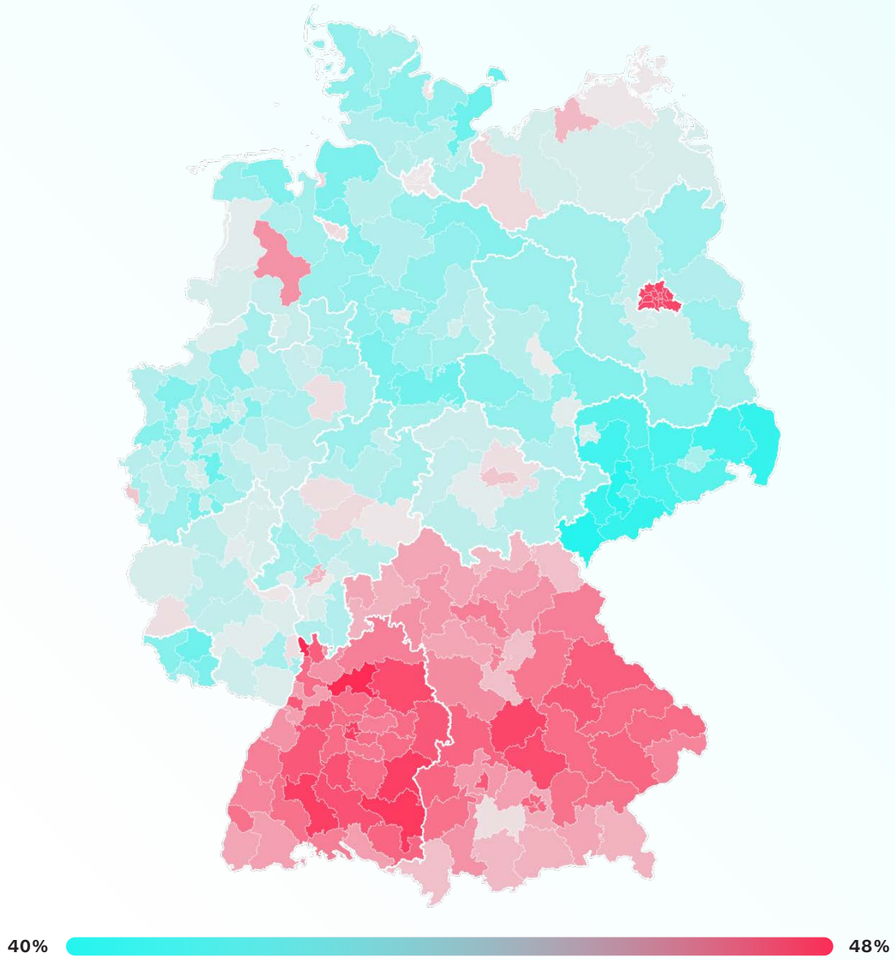
28% of German TikTok users have spotted campaigns specifically encouraging women to join technical careers.

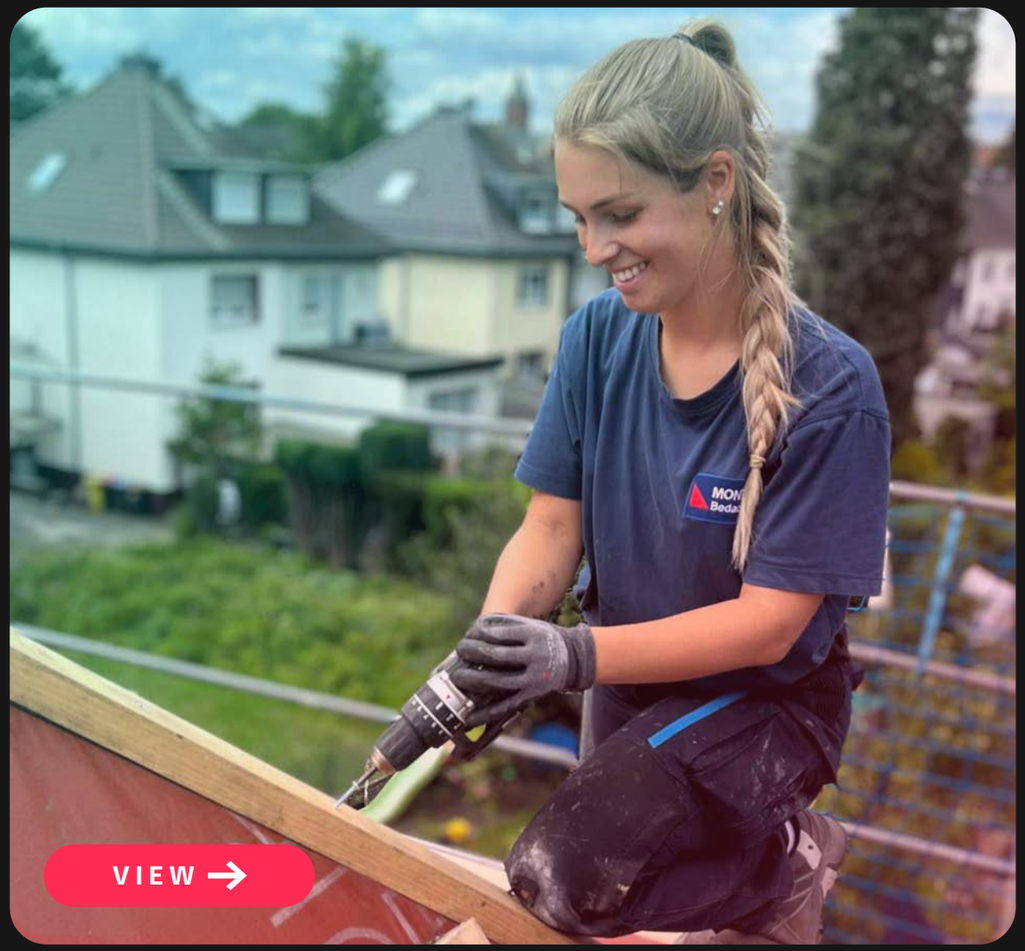
A third of women who encountered this content went on to apply for, or considered applying for, a technical role.

Dachdeckerin Chiara, a female roofer, plays this key role in relation to the roofing industry, providing a visible example of a woman working in a typically male dominated profession.

TikTok can help people discover new information and skills

% of adults agreeing, by Bundestag constituency.





CREATOR SPOTLIGHT

Dachdeckerin Chiara

Chiara Monteton · Roofer and creator, Wattenscheid near Bochum

Chiara Monteton didn't set out to become a roofer, or a creator, or a roofer-creator. She initially went to university, before landing a job in the office of her father's roofing firm. But it was the time spent on-site that she enjoyed the most, and in her early twenties she moved into roofing full time. Now Chiara has been working in her family's roofing business in Wattenscheid near Bochum for almost a decade.

Her route into content creation was similarly unplanned: she started running the company's broader social media, but found that these channels tended to show only polished photos of final products. What interested her was everything that happened before that finished result: the realities of the job, the people involved, the occasional humorous mishap. In 2020 she downloaded TikTok and found the short-form video content to be much more suitable for the trade, giving the behind-the-scenes and more authentic version of what life on the building site looks like.

This authenticity has helped Chiara to build what she calls a 'trades bubble', where roofers engage with her account to exchange ideas and ask technical questions. But the effects extend beyond those already in the profession- she regularly hears from young people who say her content helped them consider roofing and even go on to start an apprenticeship.

> **'Sometimes at trade fairs young people come straight up to me and tell me my content made them think about joining the roofing or another technical trade- it's genuinely striking how much platforms like TikTok now influence young people's career choices.'**
>
> *Chiara Monteton*

For young women especially, seeing Chiara doing the job can provide additional reassurance that roofing is a real option: 'they see that a woman can do it too — which matters a lot to other women, because they see, okay, if she can do it, I can do it too.'

This is something Chiara sees as a place where TikTok can add something more traditional careers guidance struggles to.

> **'When pupils are deciding on a career, there are career fairs or job centres which hand out brochures where you can find out about a job in the classic way. But what's in those brochures usually doesn't match reality at all — they can't really show what it's actually like to train as a roofer, a baker. With TikTok, because it's so unfiltered, you can show your job as it really is — completely authentically.'**
>
> *Chiara Monteton*

Chiara's experience and work brings together the two sides of Germany's skills shortages- employers need new ways to reach the next generation of skilled workers; potential recruits need exposure to opportunities and careers they may otherwise never have considered. Creators like Chiara help close some of that distance. As she herself puts it:

> **'Maybe I'm the little seed, but the plant only grows over time.'**
>
> *Chiara Monteton*



CHAPTER 04

Sector Spotlights

AUTOMOTIVE

Bringing the Automotive Sector Up to Speed

Germany's automotive industry is one of its defining economic strengths, and one of its most closely watched as it undergoes a significant technological transition. For consumers, this brings new products and choices to consider, from electric vehicles to new ways of thinking about mobility.

TikTok is fast becoming a key channel via which German consumers encounter the ongoing transition of this industry towards electrification. Yet it is not just evolving as an advertising platform for manufacturers but as a central host of wider conversations about electric and sustainable transport.

33% of German TikTok users say the platform has helped them learn more about electric vehicles, and 29% say it has helped them learn about more sustainable transport choices more broadly.

Changing consumer behaviour relies upon understanding of the choices available. TikTok can support this transition.

33%

of German TikTok users say the platform has helped them learn more about electric vehicles.

29%

say it has helped them learn about more sustainable transport choices more broadly.

€319m

By supporting customer discovery, aftermarket digitisation, skills and EV-related services, TikTok could generate €319 million a year in additional activity across Germany's automotive transition economy by 2030.

BOOKTOK

From BookTok to the Bookshop

Globally, BookTok has turned short-form video content into a driver of book sales, bookshop footfall and renewed interest in reading across a range of audiences. Germany, home to Europe's largest publishing market and the Frankfurt Book Fair, has seen its own share of the BookTok effect roll-out.

Among German adults on the app, 49% have used TikTok to discover an author, book or literary trend. This discovery frequently moves beyond the screen in Germany. Of users who discovered BookTok related content on the platform, 59% went on to buy a physical book, and 34% visited a local bookstore.

€482m

BookTok helped turn online discovery into an estimated €482 million in revenue from TikTok-attributed book sales across Germany in 2025 (Media Control).

49% of German adults on the app have used TikTok to discover an author, book or literary trend.

59%

of users who discovered BookTok related content on the platform went on to buy a physical book.

34%

visited a local bookstore.

> **'Before there was BookTok, I didn't read. Now I read four or five books per month.'**
>
> *Female, 26, BookTok viewer*





CASE STUDY

Buchhandlung Graff

From a local Braunschweig bookshop to a nationwide BookTok audience · Frederick Wrensch, CEO

The Graff bookstore has been part of the Braunschweig region for over 150 years. Now family-run by the fourth generation, the bookstore operates a single, 2,000-square-metre store in Braunschweig's city centre and employs around 100 permanent employees. For much of its history, addressing the readership has inevitably been local – newspaper ads, newsletters and later also a process of trial and error with a certain social media platform were the most important ways to get in touch with customers.

However, the pandemic marked a real turning point. Since the store was closed, ideas and ways had to be found to increase online sales in order to absorb the slump for in-person sales. This is how CEO Frederick Wrensch launched the 'signing campaigns'. Customers could now pre-order signed books by various German authors via the graff.de website and have them delivered to their homes on the publication date. At the time, this offer on a large scale was not available on any other platform or bookstore.

TikTok came along shortly afterwards when an author told CEO Frederick Wrensch: 'You absolutely need TikTok.' With the help of a student and a little effort, the Graff bookstore began to provide the channel with funny and approachable content about books. The focus was always on establishing the idea of the signing campaign nationwide.

As the channel grew in parallel with the signing campaigns, Graff realised that the account needed to move closer to day-to-day business and began to produce quick reactions to new releases and trends, film employees and show authors in the store (sometimes also via LIVE).

Perhaps the most significant change from TikTok use concerns geographic reach. Graff was already a household name in Braunschweig, but TikTok has helped make the bookstore and its signing campaigns a recognisable brand for readers elsewhere in Germany – and even beyond (even though the focus of the business remains on the German market).

> **'Most of our followers don't come from Braunschweig. TikTok has helped us enormously to become known to customers nationwide.'**
>
> *Frederick Wrensch*

For owner-managed bookstores, this reach is important. TikTok can make an idea – and the retailer behind it – accessible to a much larger audience without the need for a nationwide branch network or a significant advertising budget. Wrensch puts it in a nutshell:

> **'That's the great thing about TikTok: You don't necessarily need an incredible number of followers for that to happen. You can just go viral all of a sudden, and of course that also helps a very small bookstore.'**
>
> *Frederick Wrensch*



IMMERSIVE RESEARCH

From BookTok to the Book Fair

How online discovery becomes literary culture · Frankfurt Book Fair · 125+ interviews

Over two days at the 2026 Frankfurt Book Fair, PF Global researchers spoke to around 125 local residents, visitors, bookshop owners, readers and content creators, to understand the way TikTok and BookTok are shaping book discovery and participation in reading culture in Germany. Across those conversations, three themes stood out:

Online discovery is translating to offline participation: TikTok and BookTok are extending beyond encouraging book-buying or solitary reading. They are sparking new chains of literary recommendations between families and friends, supporting the formation of new friendships, and influencing attendance at events like the book fair.

> **'It's a tool to connect with people, it does not detract people from reading, and it gets people into it. So by default, it's a net positive.'**
>
> *Male, 20s, Returning reader*

One parent told us about her 16-year-old daughter who gathers recommendations from friends and TikTok, reads over 100 books a year, and gives her favourite books to her mother. We also met a group who, having connected on TikTok over a shared love of reading, had met up at the book fair for the first time.

BookTok is widening the route to discovery for independent, niche and German-language authors: Across the research, readers repeatedly described TikTok as a place where they encounter books they might not otherwise have found. Interviewees highlighted the particular opportunity this creates for self-published authors and writers working outside established genres, who may have fewer traditional routes to visibility.

> **'I'm a self-published author, and I just need visibility so people actually see my books and discover them, and I think TikTok is a great platform for me to do that. A lot of people by chance see what you're doing, and I think that's very nice.'**
>
> *Female, 30s, Self-published author*

> **'I think you can find very specific stuff, and also from small creators, because TikTok is showing you stuff that you normally wouldn't find in your bigger bookstores.'**
>
> *Female, 20s, BookTok User*

Some participants felt BookTok was influencing the wider publishing ecosystem, suggesting that BookTok's popularity had encouraged publishers to translate more English-language books into German and attracted more international authors to the German market.

> **'It has a huge impact for the German industry too, because so many more books have become known to German readers. So many books are being translated to German, and we also get more international authors coming to us.'**
>
> *Female, 30s, BookTok user*

TikTok is helping to make reading 'cool' again (and broadening who participates in reading culture): Interviewees described how BookTok has made reading 'cool' and more socially visible, rather than a more solitary or 'geeky' activity. That change was visible at the Fair itself, as visitors queued for special editions, merchandise, photo opportunities linked to favourite books and characters, and even book-themed tattoos. The enthusiasm surrounding these experiences suggests that for some younger readers, books are not only something to read, but something around which to build identity, friendships and community.

> **'A lot of people are on TikTok. They talk about what they read [...] I think it's a good thing, because it gets people to read.'**
>
> *Male, 60s, Frankfurt resident and independent bookshop owner*

> **'It can be effective at promoting reading. [... BookTok] makes reading look cool, which is something we should not forget. You know, if you want more younger people to become involved in the activity, it has to be worth their time.'**
>
> *Female, 30s, Italian YA Publisher*

Taken together, these conversations suggest that BookTok's influence extends well beyond discovery: books found on TikTok are being shared with family and friends, celebrated through special editions, and bringing readers together at events like the Frankfurt Book Fair.

THE CREATIVE INDUSTRIES

Supporting Germany's Creative Industries

Germany's creative economy includes a whole web of long-established institutions and businesses. It is also incredibly culturally and economically significant. The Federal Government's latest figures identify around 238,000 businesses and self-employed individuals operating across these industries, employing almost two million people and generating around €205 billion in turnover in 2023. (Kultur- und Kreativwirtschaft)

Much of the ecosystem is made up of freelancers and small businesses, for whom visibility is pivotal. TikTok adds another route through which their work can find an audience. TikTok has democratised access to creative production, with many more people able to start in a more informal manner. The act of producing TikTok content can translate into capabilities which have value beyond the platform. When German TikTok users were asked about the skills gained through their content creation, over half (54%) said they had used those skills in their job – one in five used these skills frequently.

Creators also see their work as contributing to German cultural life – among Germans who post on TikTok, 59% agreed that their content promotes creativity and 46% promotes culture.

The economic value of creators is not consigned to purely content derived income. They can also help existing ideas, artists and institutions travel further, acting as another purveyor of cultures across Germany.

€370m

TikTok's creative economy — from content creators to production services that support them — contributed €370 million in GVA for Germany's creative sector in 2025.

Over half

of German TikTok users (54%) said they had used the skills gained through their content creation in their job.

59%

of Germans who post on TikTok agreed that their content promotes creativity, and 46% that it promotes culture.





CHAPTER 05

Supporting Culture & Community

TikTok can help people discover the new without disconnecting them from what already matters to them. Almost half of German TikTok users (48%) say TikTok has helped them engage more with German cultural life, traditions or events.

€810m

in additional expenditure on tourism, retail, hospitality, and services in Germany in 2025 from TikTok-driven discovery and content amplification.

Cultural Life & Community

The highly regionalised cultures of Germany's Bundesländer makes the ability to spread local culture to wider audiences a valuable component of TikTok's offer. Everything from Sorbian Easter traditions from Lusatia, to the UNESCO World Heritage Kölner Dom, and Schwäbische Spätzle from the south can be discovered on the platform, giving regional culture the chance to reach audiences beyond their place of origin.

This is already shaping how people are engaging with cultures across Germany, and translating into real economic effects for the country.

Discovering More of Germany

The discovery dimension of TikTok can allow smaller destinations across Germany to enter consideration for a visit alongside Germany's best-known cities and attractions. Content on the platform can give regional food, landscapes, attractions and events a new way to reach people who may never have searched for them.

This is at a moment when domestic travel in Germany has already reached a high point – rediscovering destinations closer to home is not new for Germany, but TikTok is helping to further facilitate and share out the benefits of this regional tourism focus.

Over a quarter (28%) of German TikTok users have visited another German town or city after seeing or hearing about it on TikTok.

Share of German TikTok users who have visited another German town or city after seeing it on TikTok, by region

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026



From Feed to Front Door

38% of German TikTok users say they have visited a café or restaurant in their local area after seeing or hearing about it on TikTok.

Share of German TikTok users who have...

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026



Opening Up Cultural Institutions

For museums, galleries, artists and other cultural organisations vying for people's time and attention, TikTok provides another route to audiences who may not already be looking for them. It can make an institution or event visible, and then provide reason to experience it firsthand.

One in five German TikTok users have discovered a museum and 15% a gallery. This added reach is pronounced among younger users – 57% of 18-24 year olds and 49% of 25-34 year olds have discovered an artist through TikTok, and around a quarter in both age groups have discovered a museum. This matters as institutions continue to compete for people's time, and seek out new ways to reach their next generation of visitors/audiences.

Discovery, as established, is rarely the end of the story. A quarter of TikTok users have visited a food festival after finding out about it on the platform. 21% have attended a cultural festival, 16% have gone to a museum or gallery exhibition, and 14% have gone to a form of live entertainment (theatre, comedy) after having seen it on the platform.

For these institutions, the opportunity extends beyond promoting an existing programme to an existing audience. TikTok can help them reach different generations, introduce experiences to new people, and turn a moment of digital discovery into physical participation in cultures across Germany.

57%

of 18–24 year olds have discovered an artist through TikTok.

49%

of 25–34 year olds have discovered an artist through TikTok.

A quarter of TikTok users have visited a food festival after finding out about it on the platform.

Share of German TikTok users who have attended after seeing it on the platform

PF GLOBAL SURVEY OF GERMAN ADULTS, 2026



Creators Carry Culture Further

Creators can form an important part of how cultural content is conveyed. Among those surveyed who post on TikTok, 46% agree that the content they create promotes culture. This cultural sharing by those actually participating in regional food, crafts, music and traditions, provides another route by which Germany's heterogeneous cultures can be shared and brought to life.

This is not creators just building audiences for themselves; creators can help regional identities, cultural institutions, and creative works circulate more widely, and connect people to cultures across Germany that they otherwise might have missed.

46% of those surveyed who post on TikTok agree that the content they create promotes culture.

Connect, Connect, Connect

TikTok can help people form connections (on and offline) around shared interests. This is particularly visible in the effects of LIVE, where audiences can participate in conversations as they happen, rather than watching from the sidelines.

Among the 43% of German TikTok users who have used TikTok LIVE, over half (51%) say it helped them feel more connected to a community. 46% say they have learned new skills or gained knowledge through it, and one in three have joined a local community event or hobby group as a result.

Over half

of German TikTok users who have used TikTok LIVE (51%) say it helped them feel more connected to a community.

46%

say they have learned new skills or gained knowledge through it.

One in three

have joined a local community event or hobby group as a result.



LIVE in Germany

The immediacy of LIVE brings creator, business or institution and audience – or prospective customer – into the same place at the same time. Here, a product can be demonstrated instead of just advertised, a specialist can answer questions as they come up, a museum can take people behind the scenes of any specific exhibition or collection.

Half

of these say LIVE has helped them discover creators or experts in personal areas of interest.

This is a familiar aspect of the platform for many German TikTok users – 43% have used TikTok LIVE, and among these half say LIVE has helped them discover creators or experts in personal areas of interest.

Opening New Doors

For regional museums and cultural institutions LIVE holds particular potential benefit. Physical collections and exhibitions are necessarily fixed in place, but the audiences interested in them do not have to be.

LIVE offers up a way to make physical collections or exhibitions accessible to people who may never otherwise encounter them. LIVE allows institutions to demonstrate its pieces on display, interact with objects,take audiences behind the scenes or allow curators and specialists to answer questions directly. None of this makes the physical institution less important. On the contrary, digital access can provide a first encounter which can ultimately give audiences a reason to make the journey later on – turning access into awareness and potentially physical visits to the attraction itself.



CASE STUDY

Technik Museen Sinsheim Speyer

Making technology and mobility tangible for new audiences

For over four decades, the Technik Museen Sinsheim Speyer have been bringing German technology and mobility to life- from the annals of history to the present day, from underwater to space. Standout exhibits include the impressive Concorde, the 300-tonne U17 submarine and the Buran space shuttle.

However, for an institution built around physical objects, a central challenge remains: how do you reach younger people, who have not yet heard of or considered visiting a museum outside of their own region?

Rather than treating TikTok as just another advertising channel, Christine Dagies-Illner (Social Media Manager for the Museum) and the team started telling the stories behind individual exhibits, introducing staff and highlighting events: opening bonnets, showing details normally hidden behind barriers, explaining the history of a vehicle or machine, and giving audiences access to parts of the museum experience they would not necessarily see during a conventional visit.

Through consistent creation on the TikTok platform and personalised interactions with their audience, the museums have managed to build an engaged and dedicated community over the course of several years.

> **'They ask questions about the exhibits, they ask questions about the background... these young people are interested, they're eager to learn.'**
>
> *Technik Museen Sinsheim Speyer*

LIVE takes this approach a step further, as epitomised during the transport of a 50-metre-long submarine from Speyer to Sinsheim. Instead of simply publishing footage after the fact, the museum went LIVE at key moments, allowing viewers to watch the move unfold and ask questions in real time.

This experience deepened the relationship between the museums and their online audience: Christine could respond directly to questions, explain what viewers were seeing and react to requests as the event happened. She describes LIVE as giving the account a more human voice — and giving the museum unusually direct insight into what its community actually wants to see.

During these live broadcasts, the museums receive immediate feedback and learn which stories and exhibits particularly interest their community.

> **'There's no other way we find out faster what people actually really want to see.'**
>
> *Technik Museen Sinsheim Speyer*

For the Technik Museen Sinsheim Speyer, digital access is not a substitute for a physical museum visit. It is another door to it. By showing an exhibit moving, opening up a detail usually hidden from view, or answering a question live, TikTok can turn a collection people may never have searched for into something they want to experience directly for themselves.

Bringing Businesses Closer to Customers

The same real-time interaction can also prove commercially useful. Instead of attempting to anticipate every customer question in a static advert or product/service description, LIVE gives businesses an opportunity to respond directly and immediately, and to build familiarity with the people behind the business.

Among German businesses using TikTok, 67% agree that LIVE has helped them engage directly with customers and to build stronger relationships with their audiences.
LIVE is not simply content that happens in real-time: it is a two way exchange, sharpening discovery into interaction, interaction into understanding, and understanding into trust.

67% of German businesses using TikTok agree that LIVE has helped them engage directly with customers and to build stronger relationships with their audiences.

€125m **generated in GVA for businesses in Germany by LIVE in 2025.**



Methodology & Appendix

Consumer & Business Surveys

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

A consumer survey of 2,025 adults from 4 to 15 August 2026. Participants were allowed to take part if they were aged 18+ and lived in Germany. 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 513 business decision makers from 4 to 28 August 2026. Participants qualified if they were a director or above in a private sector business and both they and their business were based in Germany. 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.

Wahlkreis-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 Wahlkreise (federal constituencies) without requiring the sample sizes that would be required for this level via traditional polling. Findings at the Wahlkreis level that are modelled from polling are based on MRP analysis.

Qualitative & Immersive Research

PF Global conducted four in-depth case study interviews with German businesses and creators about the role of TikTok in their work and wider industry. We combined these qualitative insights with 2 days of immersive (on-the-ground) research conducted at the Frankfurt Book Fair, with over 125 interviews recorded.

ECONOMIC MODELLING

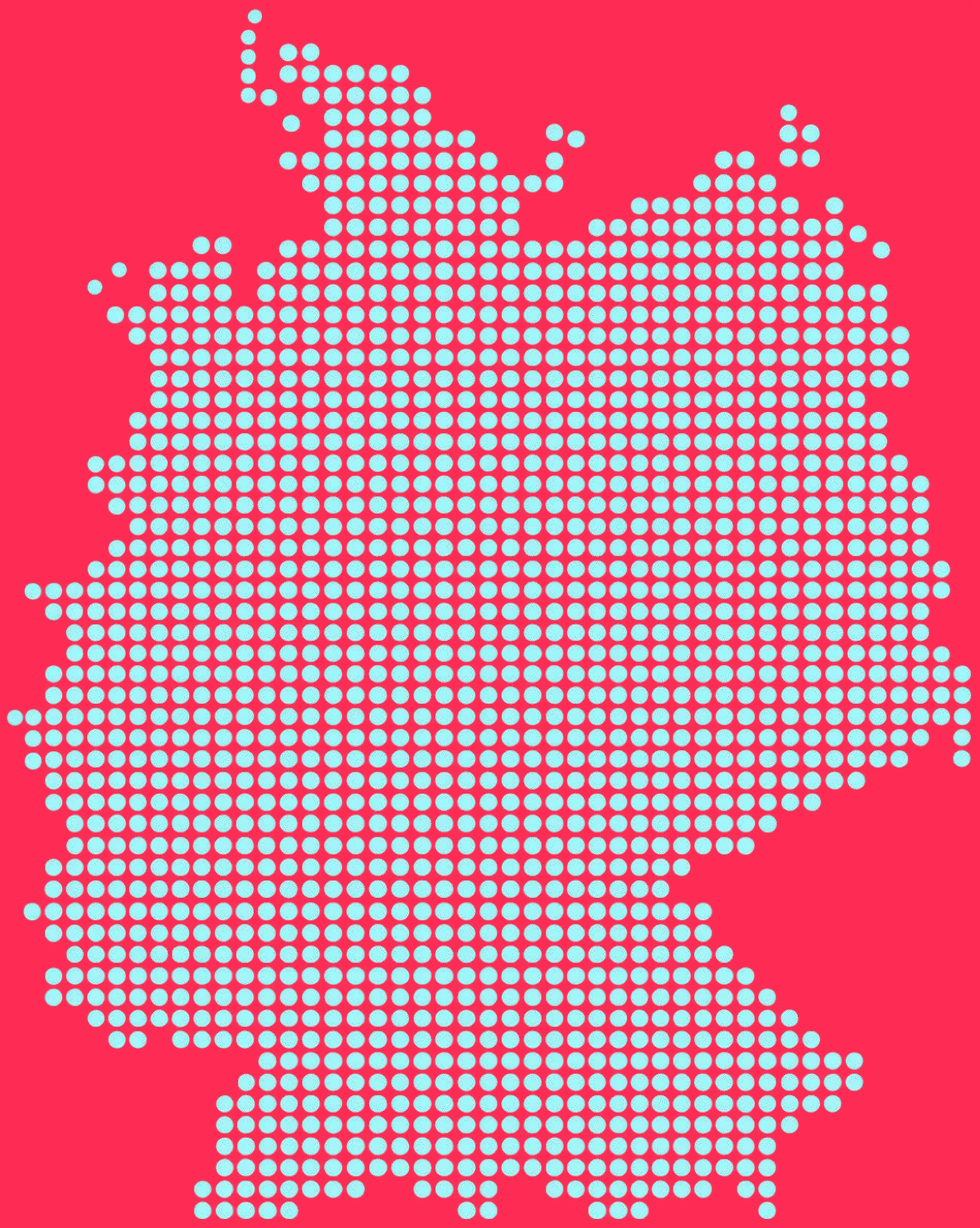
CLAIM	METHODOLOGY
Economic impact of TikTok - GVA and Jobs	We derive TikTok's advertising revenue from the filed turnover of TikTok Information Technologies UK Ltd at Companies House, which covers TikTok's European, Latin American and African markets. We adjust for the advertising share of turnover from its last disclosed revenue breakdown, and allocate this to Germany 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 German social media ad spend. We validate this against an estimate of TikTok's global share of social media ad spend, applied to the German 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 Germany. 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 Germany 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 Germany, 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 Germany, 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 enterprises in Germany. 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.

ECONOMIC MODELLING (CONTINUED)

CLAIM	METHODOLOGY
Economic impact of TikTok's creative ecosystem	We estimate TikTok's contribution to two creative sectors in Germany: 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. We use Eurostat nominal GDP growth to bring the 2023 estimates to 2025.
Incremental Consumer Expenditure	We use PF Global data on the number of purchases made by adults in Germany 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 Germany to construct counterfactual spend under the platform average, and calculate the resulting business savings.
Economic impact of learning on TikTok	We use PF Global survey data to obtain the typical weekly time employed adults in Germany spend watching TikTok content they describe as learning, and scale this to the employed population using the Eurostat Labour Force Survey. We apply a conservative discount for the share of informal learning that transfers to the workplace, from the training-transfer literature. We value these hours at the equivalent cost of formal training, applying the median completion rate of online courses (Jordan, 2015) and the cost per hour of vocational training courses from the Eurostat Continuing Vocational Training Survey.

ECONOMIC MODELLING (CONTINUED)

CLAIM	METHODOLOGY
TikTok and labour market matching	We use Bundesagentur für Arbeit data on the number of jobs started in Germany in 2025, including apprenticeships, by age group. Using PF Global survey data, we derive the share of employed adults in each age group who report finding their current job through TikTok. We adjust for additionality using the share of TikTok users who agree TikTok helped them discover career paths they would not otherwise have considered.
Operational Impact	We use TikTok data on the 2025 wage bill and headcount of TikTok Germany GmbH. We estimate direct GVA by dividing the wage bill by the labour share of value added in the computer programming and information services sector, using Eurostat input-output tables. We estimate indirect GVA and jobs using Type I multipliers for the same sector, with employment coefficients from Eurostat national accounts adjusted for productivity growth since 2022. Induced effects are excluded.
TikTok and electric vehicle sales	We estimate the value of new electric vehicle (EV) sales in Germany in 2030 using the IEA Global EV Outlook 2026, projecting Germany's EV share of new car sales along the IEA's Stated Policies Scenario path for Europe and valuing sales at IEA average prices by powertrain. We estimate TikTok's share of automotive advertising as the share of German ad spend on social media multiplied by TikTok's share of social media ad spend. We convert this into a share of sales using the median long-term advertising elasticity from a meta-analysis of 402 estimates (Sethuraman, Tellis and Briesch, 2011).
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 Germany.



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