

UNLOCKING CULTURE IN EUROPE

An assessment of TikTok's cultural impact in the EU

THE DIVERSITY OF EUROPEAN CULTURE

PAGE 4

DIGITALISATION IS ENABLING ACCESS TO CULTURE

PAGE 10

TIKTOK AS A CONDUIT FOR CULTURE IN EUROPE

PAGE 14



GAME CHANGERS



FOREWORD

Culture holds tremendous power across the globe, and Europe has a particularly rich cultural heritage. Europe is home to diverse forms of cultural expression, which stems from both the distinct national and regional cultures, as well as their interaction through European integration within the EU.

Today, this cultural richness continues to flourish. Digitalisation has dramatically widened access to culture and created new forms of engagement; platforms now serve as both a window into and a bridge between the different aspects of European culture.

Against this background, TikTok offers a new format for discovering, participating in and sharing cultural expressions across borders.

To explore this, Ipsos surveyed 8,000 TikTok users from 8 European countries to gauge:

- 1) How TikTok users perceive culture in Europe; and
- 2) What role TikTok as a platform plays in the cultural realm.

Based on findings from the survey, this report explores, amongst other things, the role of TikTok in enabling European users to access and participate in different forms of culture and cultural activities, as well as how the platform facilitates community-building and fosters a sense of belonging among users.

SUMMARY

INCREASING ACCESS TO CULTURE IN EUROPE

TikTok is a bridge to culture for its users. It is a place where users have experiences they cannot have in the real world, and where they learn about and draw inspiration from forms of culture from across Europe and the world in ways that they could not do offline.

UNLOCKING SELF-EXPRESSION AND CREATIVITY

With 1 in 5 TikTok users actively creating content on the platform, TikTok is an accessible platform for self-expression and creativity. The access to diverse forms of culture seems to encourage self-expression; consequently, it is not surprising that the majority of users feel that TikTok makes it easier for people to express themselves. Next to passion for creativity, this desire for self-expression is what motivates creators.

BRINGING PEOPLE CLOSER TOGETHER

Culture has the power to bring people together and to create a sense of community and belonging – this is what differentiates culture from entertainment. The majority of European TikTok users note that TikTok helps them feel part of a community. A similar feeling exists among TikTok creators; community building or getting in touch with new people are among the key reasons for creators to share content on the platform.

THE FACTS ABOUT TIKTOK USERS IN EUROPE ¹

59%

feel that TikTok allows them to **experience** things that they can't experience live

87%

have **learned** something via TikTok

58%

bought / went to see something because of TikTok

1 in 5

is a **content creator**

69%

say TikTok helps people to **express** themselves more easily

62%

made or created something they have seen on TikTok

1 in 2

report that TikTok makes them feel **part of a community** of people with similar interests & values

1 in 4

creators create content mainly to **build a community** or get to know **new people**

THE DIVERSITY OF EUROPEAN CULTURE

While there is no single definition for culture, no one can deny its power and relevance. Culture holds communities together and allows people to gather around common interests. Culture can provide a sense of shared values and give people a feeling of belonging at a particular moment and throughout time.





THERE IS NO SINGLE DEFINITION OF CULTURE

Cultural heritage helps people collectively learn from the past - and emerging culture shapes our present and future.

While **emerging culture** sets the tone in communities today through fresh, new cultural expressions (in digital art, food trends, etc.); **cultural heritage** or high culture (traditions, architecture, art in museums, etc.) is not to be ignored as it can be lived through traditions and rituals or remembered through a reflective lens. Cultural heritage is essential to communities as it is a source of learning and dialogue.

Culture moves at different speeds. Some cultural expressions are deeply engrained in our societies; others are more ephemeral and fleeting.

Be it in food, fashion fads or TV shows, we have all seen examples of **fast** cultural expression emerge. This culture is visible, vivid, obvious and fashionable - quick to appear but also to evaporate. Nevertheless, these are genuine expressions of constantly evolving social values.

At the same time, a plethora of cultural expressions are woven into our daily lives and habits, to the extent that we don't even realise it. Less visible, these expressions are referred to as **slow culture**, long-standing traditions that are part of our bedrock.¹

THE CULTURAL SPECTRUM

CULTURE CAN BE FOUND ALL AROUND US IN A PLETHORA OF FORMS.

Cultural heritage ↔ Emerging culture

Slow culture ↔ Fast culture

Local culture ↔ Global culture

Culture exists at many geographical levels.

We all live in **local** communities that tend to feature their own specific, diverse subcultures. This is especially true in the European Union, whose motto is United in Diversity. Meanwhile, no one can deny that globalisation has given way to **global cultures** that are shared across different geographical communities.



There is an orthodoxy of approach to cultural engagement which is based on a narrow definition (...) which obscures the significance of other forms of cultural participation which are situated locally in the everyday realm.²

Sources: ¹ Grant McCracken framework

² Miles, A., & Gibson, L. "Everyday participation and cultural value", Cultural Trends, Vol. 25, 2016

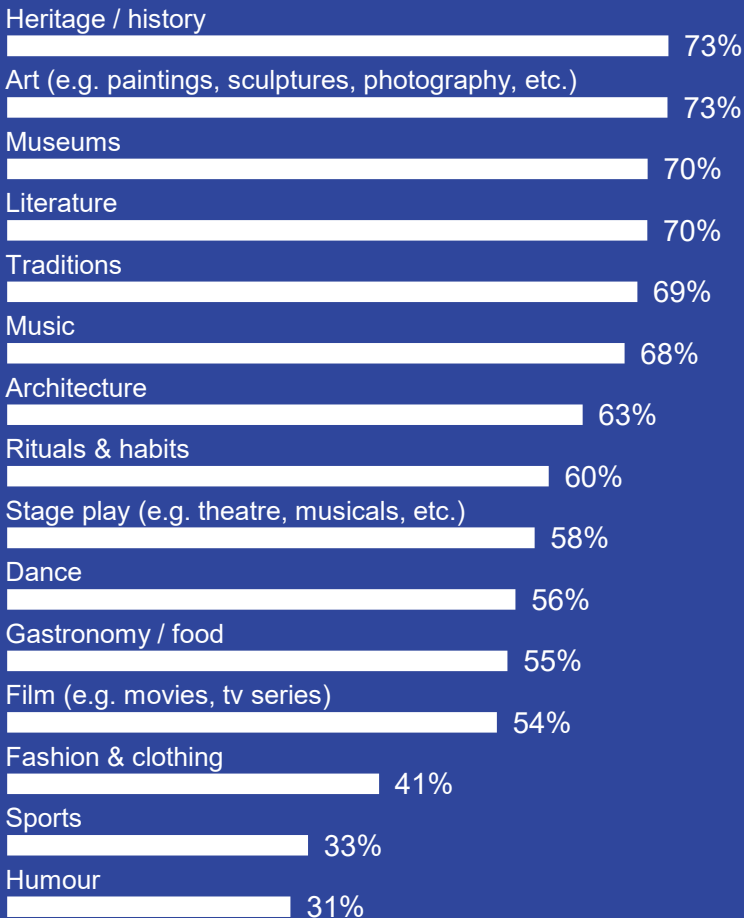


EUROPEAN TIKTOK USERS BELIEVE THAT THERE ARE MANY FORMS OF CULTURE.

What do you consider to be a form of culture? ¹

When we asked European TikTok users **what they consider to be forms of culture**, we received a wealth of responses.

About 7 in 10 users consider heritage, history, art and museums to be a form of culture, closely followed by literature, traditions and music. In addition, the majority perceive architecture, rituals & habits, stage plays, dance, gastronomy and film to be forms of culture, as well.



CULTURE MATTERS

52%

of TikTok users in Europe believe that TikTok makes them feel part of a community of people with similar interests and values ¹

63%

of TikTok users in Europe feel that TikTok improves their mood ¹



Listening to music has been shown to alleviate anxiety in young adults, who have until now been relatively neglected in debates and programme development around music, arts and wellbeing. ²

Culture has the power to connect and make us feel like we belong.

Culture binds people together with shared interests and values, both locally or globally. When entertainment turns into something that gathers people together and helps them share their interests, views and values, it becomes a form of culture, on a small or large scale.

UNESCO ² stresses:



Culture has a central role in sustaining and enhancing individuals' and communities' quality of life and wellbeing.

Active and passive participation in cultural activities can increase wellbeing.

A synthesis report from the WHO showed the positive impact of arts on physical and mental health on various levels, from prevention to management and treatment.² But it's not strictly about the arts alone. Various forms of participation in cultural activities can increase wellbeing. This may be as simple as listening to music, according to the What Works Centre for Wellbeing.³



Sources: ¹ Ipsos survey among n=8000 TikTok users across 8 EU countries, December 2022

² Health evidence network synthesis report 67, WHO, 2019

³ What Works Centre for Wellbeing; 2019

“THERE ARE STRONG CULTURES ACROSS EUROPE”

7 in 10
TikTok users
in Europe agree ¹

There is a wide diversity of local and national cultures in Europe.

Most European TikTok users agree that there is a strong nation-wide culture in their country, although the sentiment varies from one country to another. TikTok users from all countries uniformly agree that there are strong cultures in Europe overall.

European countries seem to value the protection of culture and traditions.

More than 6 out of 10 European TikTok users believe that the protection of culture and traditions is a value that is (very) strongly present in their country. On top, most believe that this value is also being shared by most or all EU countries.

How strongly present is the value of protection of culture and traditions in your country?



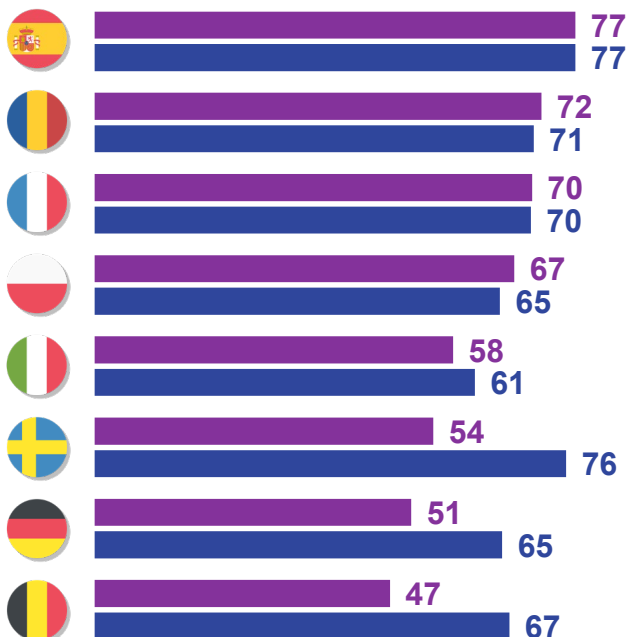
■ Not strongly present in my country ■ Neutral ■ (Very) strongly present

To what extent do you feel this value is shared across other European countries?



■ Shared by a few or no EU countries ■ Shared by about half of EU countries ■ Shared by all or most EU countries

To what extent do you feel there are strong cultures in Europe / your country?



■ % think there is a (very) strong culture in their country
■ % think there are strong cultures in Europe



EUROPEAN CULTURE IS DEFINED BY ITS CITIZENS

WHILE THE EU INSTITUTIONS REFRAIN FROM SPECIFICALLY DEFINING WHAT CULTURE IS OR SHOULD BE, THEY ACKNOWLEDGE THAT CULTURE IN EUROPE IS EFFECTIVELY DEFINED BY ITS CITIZENS.



None of the founding documents of the European Union proposes a strict and restrictive definition of what culture is, leaving it to the discretion of the Member States and individuals to define it, based on their national, local and individual sensibility.

- European Commission

The EU is a catalyst and protector of culture in Europe

Through various initiatives, the EU of today is aiming to provide opportunities for artistic creation and distribution, encourage critical thinking and dialogue and safeguard European values. One example of the EU as a promotor of culture in Europe is 'Culture Moves Europe': a scheme that supports the mobility of artists, creators and cultural professionals. It is part of Creative Europe's Culture strand, which encourages cooperation and exchanges among cultural organisations and artists within Europe and beyond.



DIGITALISATION IS ENABLING ACCESS TO CULTURE

It is up to the people who create and experience culture to define its content and push its boundaries.

While the need for cultural expression is ancient, digitalisation has opened many opportunities for the democratisation of artistic creation and distribution.



A MAJOR SHIFT IN CULTURAL EXPRESSION & CONSUMPTION: DIGITALISATION & WEB 2.0.



89% of Europeans aged 16–74 used the internet in 2021 ¹

The way culture is shared has changed tremendously over recent decades.

Not so long ago, you had to go to a museum to see a particular piece of art or to a cinema to watch a movie. Today, you can participate in virtual tours, look up images or stream music or films in an increasingly immersive way.

Digitalisation creates new opportunities to access and experience culture.

This evolution leads to people being more connected than ever, sharing their experiences, thoughts and perspectives online. This allows cultural expressions to travel around the globe more easily. Such tendencies can be perceived as positive, since it becomes easier to access, discover and help preserve culture from around the world.

MORE AND MORE EUROPEANS ARE FINDING THEIR WAY TO TIKTOK

38%

of TikTok users in Europe started using TikTok less than 1 year ago ²

LOOKING AT WHAT MIGHT BE NEXT: THE METAVERSE AND WEB 3.0

The metaverse is not a distinct technology or merely virtual worlds, but a technological ecosystem that offers seamless and permanent, connected experiences between real and virtual worlds – in every aspect of our life. Technology like AR, VR and mixed reality have the potential to provide deeply immersive experiences in key areas such as learning, entertainment and even tourism. The metaverse could hold huge potential for creativity and access to culture.

Sources: ¹ Eurostat

² Ipsos survey among n=8000 TikTok users across 8 EU countries, December 2022

DIGITALISATION MAKES IT EASIER FOR EVERYONE TO ACCESS AND CREATE CULTURE.

There are now more forms of cultural expression than ever before, and new platforms have given more people opportunities to express themselves and potentially allow for more diversity in the cultural realm. With user-friendly and intuitive creation tools (often already at hand in mobile devices) and the possibilities of Web 2.0, the instrumental barriers to creativity and expression are being lowered, enabling a participatory culture where **everyone can be an artist and express themselves.**



CONTENT CREATION

1 in 5

of TikTok users in Europe create content at least monthly ¹

SELF-EXPRESSION

69%

of TikTok users in Europe say that the platform helps people to express themselves more easily ¹

EXAMPLES OF TECHNOLOGY ENABLED CREATIVITY AND CULTURAL EXPRESSION

The human need for cultural expression is ancient.

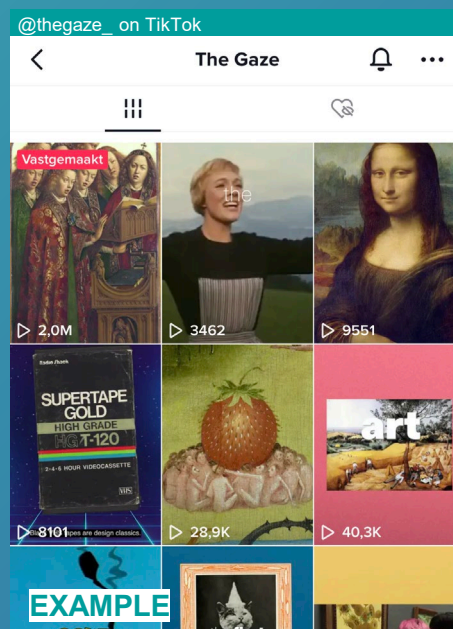
But the expression and consumption of culture have evolved.

While the need for cultural expression has always been there, major societal or technological shifts have, over time, changed how culture is created, expressed and consumed.



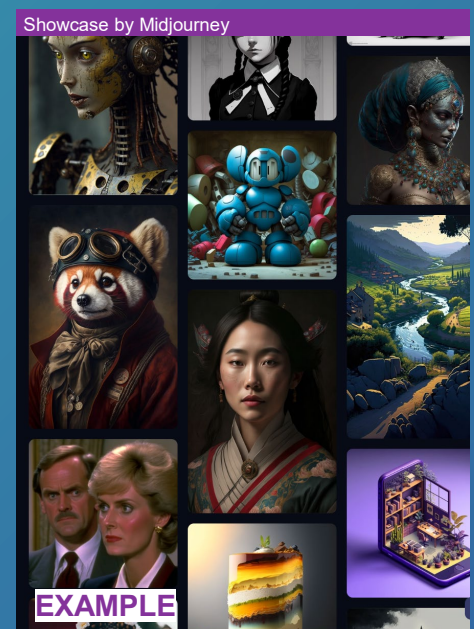
Hypnerotomachia naturae: old myths meet 3D printing technology

3D sculpture 'hypnerotomachia naturae' shows how technology doesn't contradict creativity, but rather can expand it. The sculpture is made out of multiple individual 3D printed concrete parts creating one continuous whole, reminding viewers of the diversity of utopias, myths and cultures. The installation is found at the Landes museum in Innsbruck (Austria).



The Gaze Art: how digital tools revive interest in old and new art

The Gaze Art provides commentary and explanations of pieces of art and design in a highly engaging way with short, playful reels. By doing so, it succeeds in reaching an audience that would otherwise not be exposed to these cultural forms.



Midjourney: how AI pushes the boundaries of creativity

Midjourney is a research lab that creates tools like the Midjourney Bot, an AI powered algorithm that instantly produces unique images based on simple written instructions. Midjourney wants to explore new mediums of thought and expand the imaginative powers of humans.

TIKTOK AS A CONDUIT FOR CULTURE IN EUROPE

TikTok has impacted our way of consuming culture, since it offers a new format and platform for sharing and discovering different cultural expressions across Europe. It is a place where people discover culture of all kinds: not only the latest and fastest cultural trends, but also the highest expressions of slow culture and of our cultural heritage.

European TikTok users agree that the platform allows people to express themselves more freely and gives them the feeling of being part of a community.



TIKTOK: ENABLING ACCESS TO CULTURE

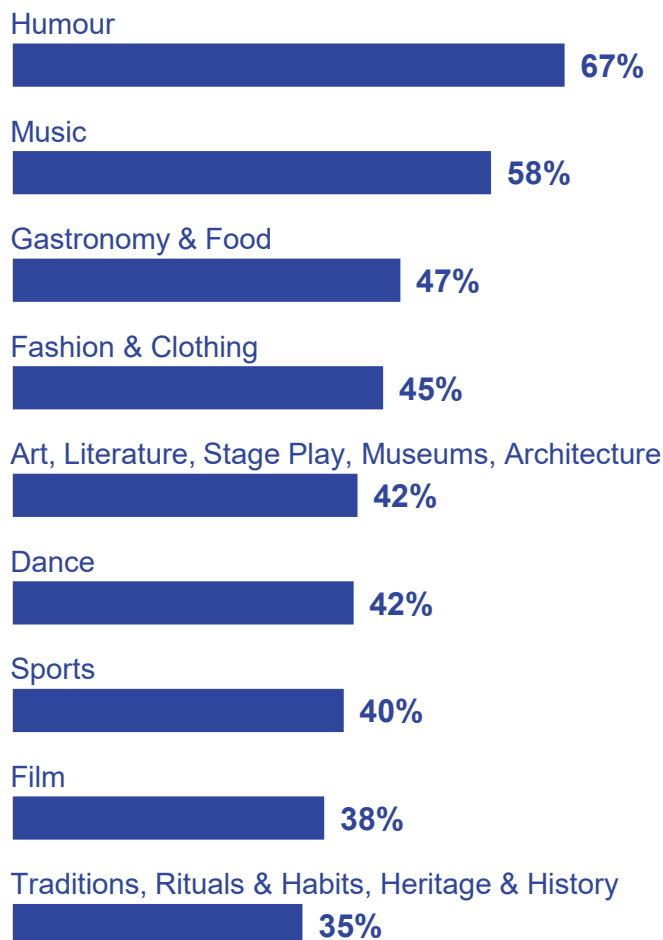
European TikTok users are hungry for culture. TikTok allows them to experience culture as much as they want.

59%

of TikTok users in Europe say TikTok allows them to experience things they can't experience live²

European TikTok users are interested in a wide variety of cultural activities and expressions (music and film, heritage, art, museums, etc.). However, they face barriers that prevent them from fully experiencing and participating in 'offline' culture. Culture Action Europe, notably highlights lack of time, limited financial means, limited information and limited choice as barriers to cultural participation¹

What sort of content have you seen on tiktok in the past 6 months?²



TIKTOK: MUCH MORE THAN MUSIC AND DANCE!

TikTok is famous for its music and dance content, as well as its humour - but it is much more than that for users. On average, a TikTok user has seen content across 5 of the listed cultural expressions in their feed in the past 6 months.²



Bottom-up content

Content on TikTok develops organically based on users' interests. The algorithm continually responds to a user's interest and engagement with content. Engaging content is the key to going viral, not the number of followers.



TikTok enabling access to culture... INCLUDING IN THE OFFLINE WORLD

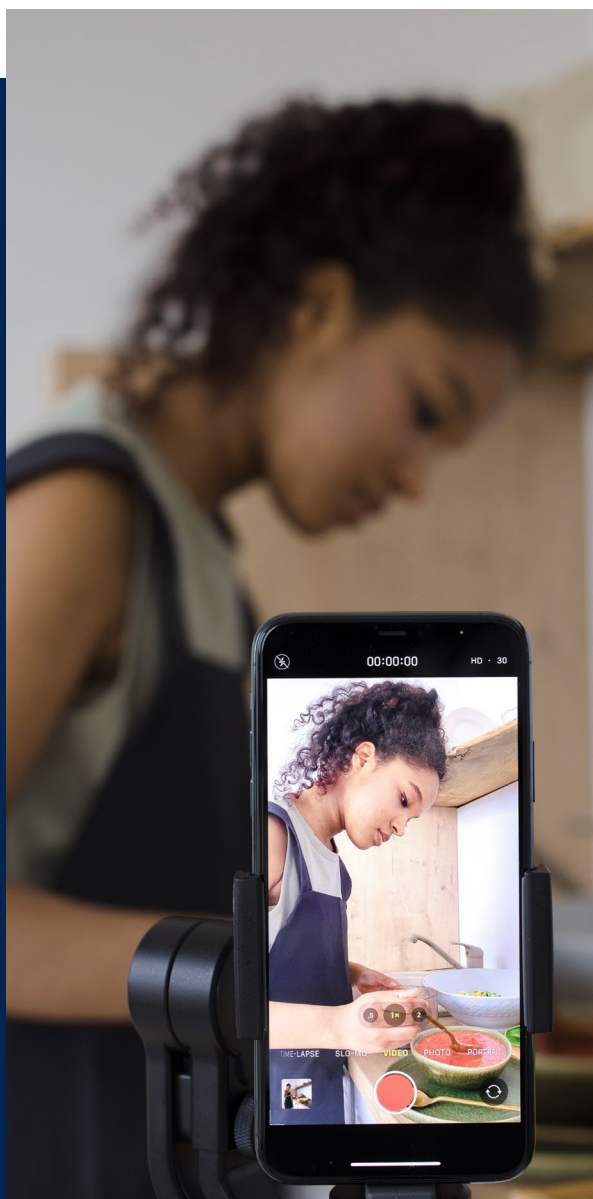
The vast majority of TikTok users report that they have learned something new via TikTok - in most cases from the “real” world, including genuine offline cultural expressions.

62%

of TikTok users in Europe said TikTok makes it easy to learn new things ² ¹

87%

of TikTok users in Europe have learned something via TikTok ¹



What are tiktok users in Europe learning on the app? ¹

4 in 10

learned about

Food recipes

(New) songs

Life hacks

Jokes

3 in 10

learned about

Films or series

Sports tips

Destinations to visit

Beauty & care

Cleaning or household tips

2 in 10

learned about

Habits or traditions from other countries / cultures

Dances

EXAMPLE: HOW #BOOKTOK MADE IT TO THE SHELVES OF BOOKSTORE CHAINS

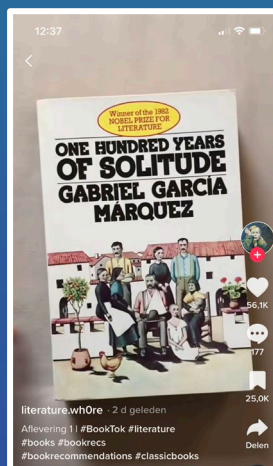
#BOOKTOK

With the #BookTok phenomenon, TikTok helped increase physical book sales in the US by 9% in 2021, as well as in the UK (2%). #BookTok not only boosted new literature, but also revived the popularity of some old titles, making TikTok a source of cultural discovery and inspiration to users.²

Physical bookstores leveraged the #BookTok phenomenon by creating dedicated #BookTok corners in their stores. Standaard Boekhandel, Belgium's biggest bookstore chain, has a section called "bekend van TikTok" – "known from TikTok".



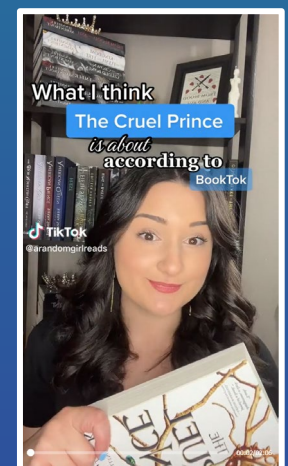
The screenshot shows the website of Standaard Boekhandel. At the top, there is a search bar with the text "Waar ben je naar op zoek?". Below the navigation menu, there is a section titled "Bekend van TikTok" (Known from TikTok). The text below the title reads: "Op TikTok delen jonge lezers recensies en boekaanbevelingen via de hashtag #BookTok. De hashtag, die ook in België en Nederland naam #BookTok, is al bijna 20 miljard (!) keer bekeken. Van adembenemende fantasy boeken tot nagelbijtende thrillers, bij ons aanbod aan boeken die op TikTok aanbevolen worden." Below this, it says "Elk van deze boeken kan je bij jou thuis laten leveren of afhalen in een Standaard Boekhandel in de buurt." There are 113 results listed. A category list on the left includes: Ontspannende boeken (50), Literatuur & Romans (46), Kinderboeken & Jeugdboeken (44), Science fiction & Fantasy (23), and Spannende boeken (5). A featured book is "IT ENDS WITH US" by Colleen Hoover, described as "SOMETIMES THE ONE WHO LOVES YOU IS THE ONE WHO HURTS YOU THE MOST. Lily hasn't always had it easy, but that's never stopped her from working hard for..." with a link to "Lees meer".



@literature.whOre



@book_tok.657



@arandomgirlreads

Sources: ¹ Ipsos survey among n=8000 TikTok users across 8 EU countries, December 2022

² World Economic Forum (weforum.org): "how TikTok helped propel book sales to a bestselling year", March 2022

TIKTOK: ENABLING CREATION AND PARTICIPATION IN CULTURE

CONTENT CREATION ON THE PLATFORM IS VERY EASY, ALLOWING MANY USERS TO BECOME CREATORS AND EXPRESS THEMSELVES



The barriers to creating content and sharing creative expression on TikTok are quite low: co-creation is supported as videos can be easily re-used or re-mixed. It is also a platform for talent discovery, as trends or artists born on TikTok can develop and have a broader impact beyond the platform as well. Traditional cultural institutions and artists have the opportunity to reinvent themselves and connect with a broader (younger) audience.

69%

of TikTok users in Europe feel that TikTok makes it easy for people to express themselves freely ¹



TIKTOK AS A CANVAS FOR ESTABLISHED & EMERGING ARTISTS

Top 5 reasons to create content on TikTok¹

Because I love doing it **30%**

To be able to express myself **27%**

To get in touch with new people **14%**

To build a community **12%**

Because I want to be famous **9%**

1 in 5 TikTok users in Europe is a content creator

What type of content do you create on tiktok?¹



Many TikTok users have been inspired to create or participate in cultural expressions in the offline world - after having discovered these on TikTok.



62%

of TikTok users in Europe have made or recreated something they saw on TikTok ¹



4 in 10 made

A new dish

2 in 10 made

Music

Home decoration

Clothes

1 in 10 made

Drawings or paintings



58%

of TikTok users in Europe have bought or been to see something after seeing it on TikTok ¹



2 in 10 bought or went to see

A film

Clothes or shoes

Beauty or skincare products

A book

1 in 10 went to

A country

A sports competition

A museum or exhibition

A concert

A theatre

TIKTOK: BRINGING PEOPLE TOGETHER

Culture has the power to bring people together and to create communities and a sense of belonging. The majority of European TikTok users agree that TikTok helps them feel part of a community. Simultaneously, building communities or getting in touch with new people are among the key reasons for creators to share on the platform.

TikTok connects people all over the world around shared ideas or common interests.

On TikTok, bridges are established between different regions and countries, allowing users to discover other users' cultures. This allows traditional cultural institutions, as well as individual artists, to reach and engage with broader and more diverse audiences.



60%

Of TikTok users in Europe feel that TikTok helps them understand better what other people do and how they live ¹

52%

of TikTok users in Europe said that TikTok makes them feel part of a community of people with similar interests ¹

52%

of TikTok users in Europe think that TikTok brings people closer together ¹



European TikTok creators are driven by the community aspect as well

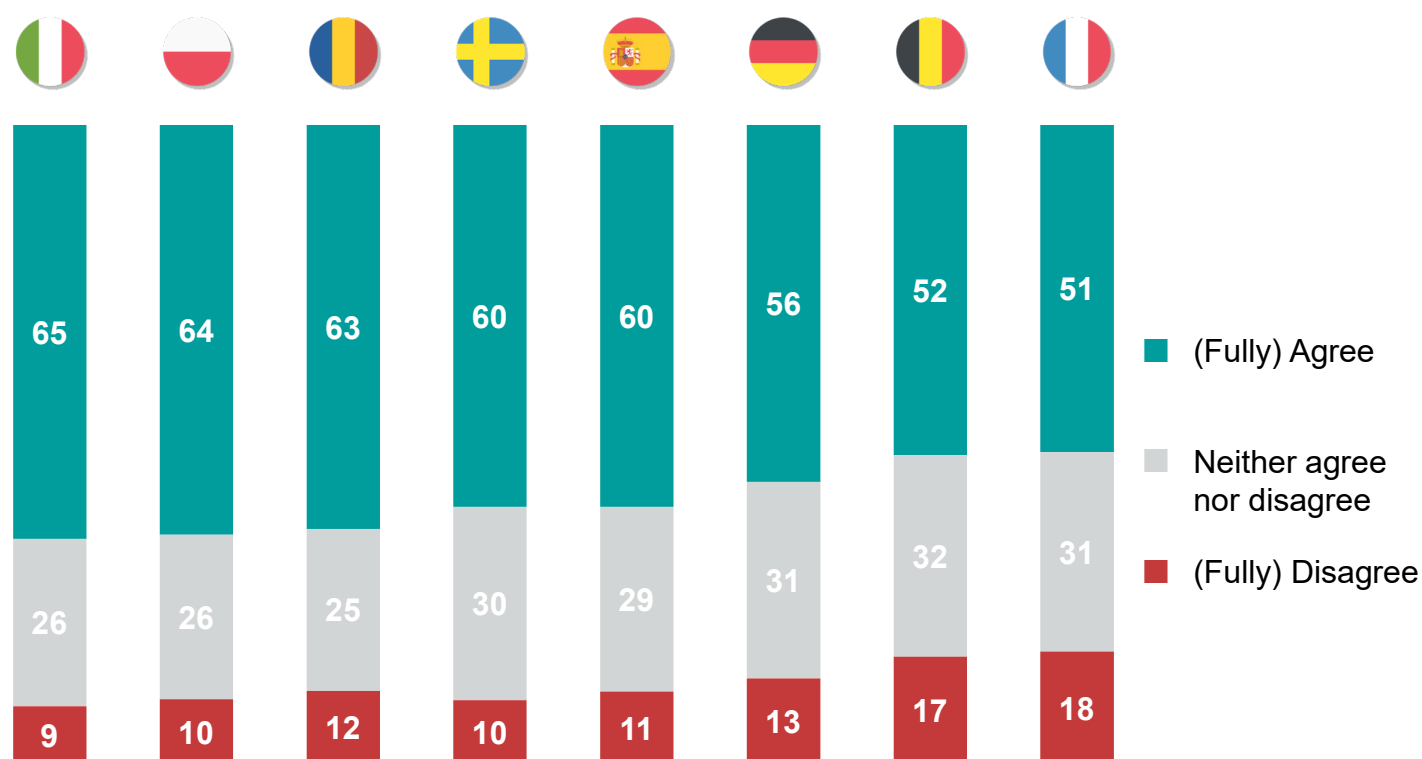
While the top reason for creating content on TikTok is quite simple – the joy of creating – , 26% state that they mainly do it to join a community or to get to know new people.



TikTok provides a window into other people’s daily lives, habits and traditions. The platform enables authentic narratives to be heard. In each country surveyed, the majority of TikTok users feel that via TikTok they gain a better understanding of what other people do and how they live. Since the unique algorithm is based on interest in the content itself rather than the number of followers the creator attracts, **a very local expression of culture can reach a worldwide audience.**



Via TikTok I understand better what other people do and how they live.¹



Source: ¹ Ipsos survey among n=8000 TikTok users across 8 EU countries, December 2022

ABOUT THE RESEARCH

Results were gathered by Ipsos via an online survey conducted among 8,000 European TikTok users aged 18-55 in November and December 2022. Countries included in the survey: Belgium, Germany, France, Italy, Poland, Romania, Spain, Sweden. In each country, 1,000 TikTok users completed the survey.

To ensure data quality and to make statements about the entire population of TikTok users, the survey was sent out representatively, based on

gender, age and region within each country.

The aggregated total is a percentage that is weighted based on the number of TikTok users per country. This means that countries with a higher population overall and/or a higher number of TikTok users will weigh more heavily on the aggregated total than a country with a small population and/or few TikTok users.



UNLOCKING CULTURE IN EUROPE

Clément Degrave Head of European Curation HUB, Ipsos Belgium

Dorien Deckers Senior Curator, Ipsos Belgium

Benjamin Burssens Client Director, Ipsos Belgium

Wout Doom Senior Research Executive, Ipsos Belgium

GAME CHANGERS



