

The New Commerce Landscape

From Attention to Incremental Sales: Quantifying TikTok's Offline Impact with NIQ



Evgenij Isakulov

E-Commerce Leader
NIQ Alpine



Marta Łabanowska

TikTok

FMCG E-Commerce is now a €2.1bn market in Austria



Online purchases account for 9% of total FMCG value sales

FMCG E-Commerce
Share of Value

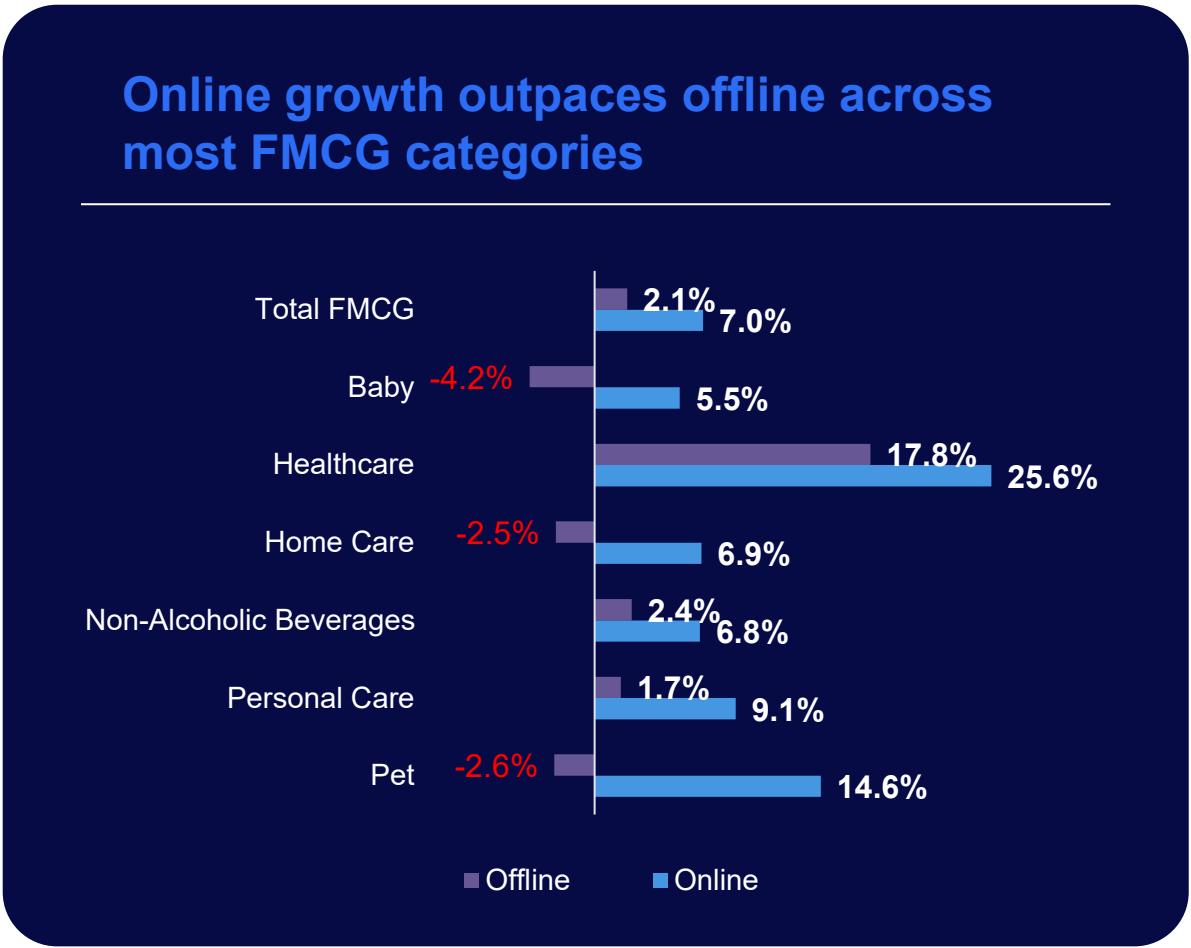
9.0%

Prestige Beauty
E-Commerce
Share of Value

56.8%

Tech & Durables
E-Commerce
Share of Value

35.5%



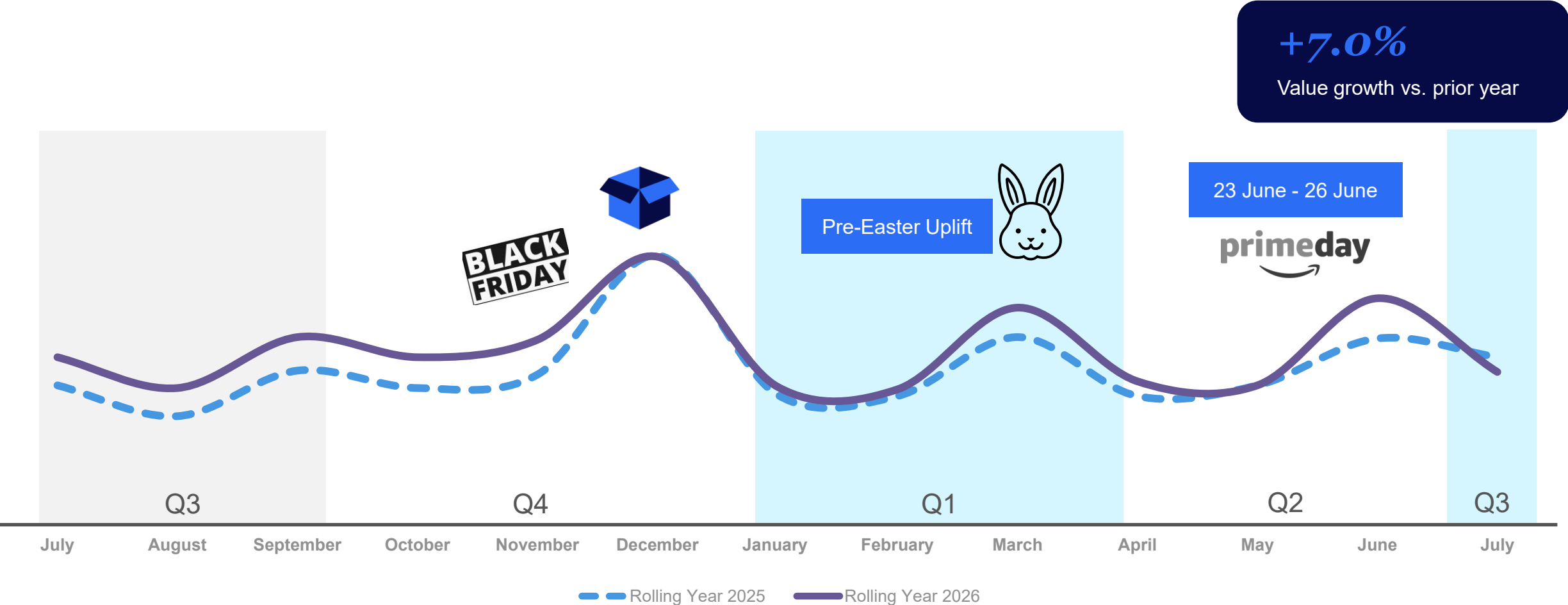
Source: NIQ Omnisaales Austria / Total FMCG / L52W ending 9 August 2026

Austria`s FMCG E-Commerce grows +7%, with event-led peaks shaping demand



Monthly FMCG E-Commerce value sales

Current rolling year vs prior rolling year | Austria | L52W ending 9 August 2026



Source: NIQ Omnisales Austria / Total FMCG / L52W ending 9 August 2026

Austria's E-Commerce mix is shifting toward marketplaces and everyday categories



Marketplace share: 47.1% of E-Commerce value up +0.7pp vs. prior year

Top Online Retailers by value sales

Rank movement vs. prior year

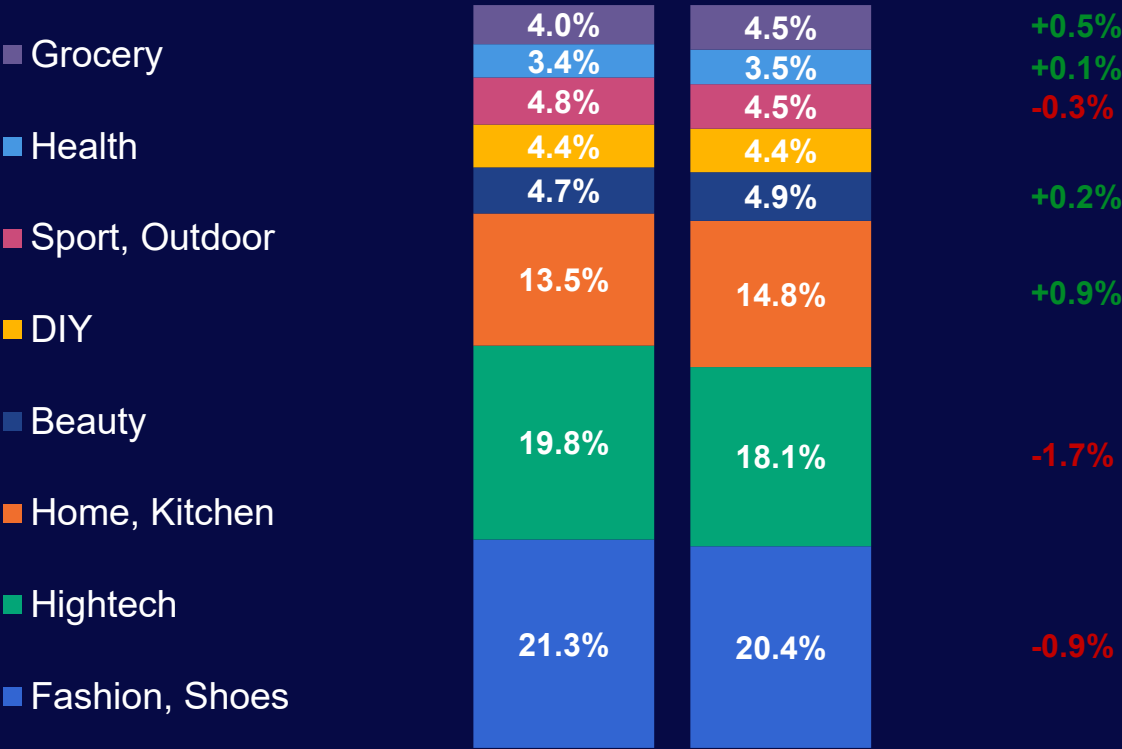


Fastest growing

MediaMarkt
+0.5 pp share gain

The category mix is moving beyond High Tech and Fashion

Share of Total E-Commerce value / Current L52W vs prior L52W



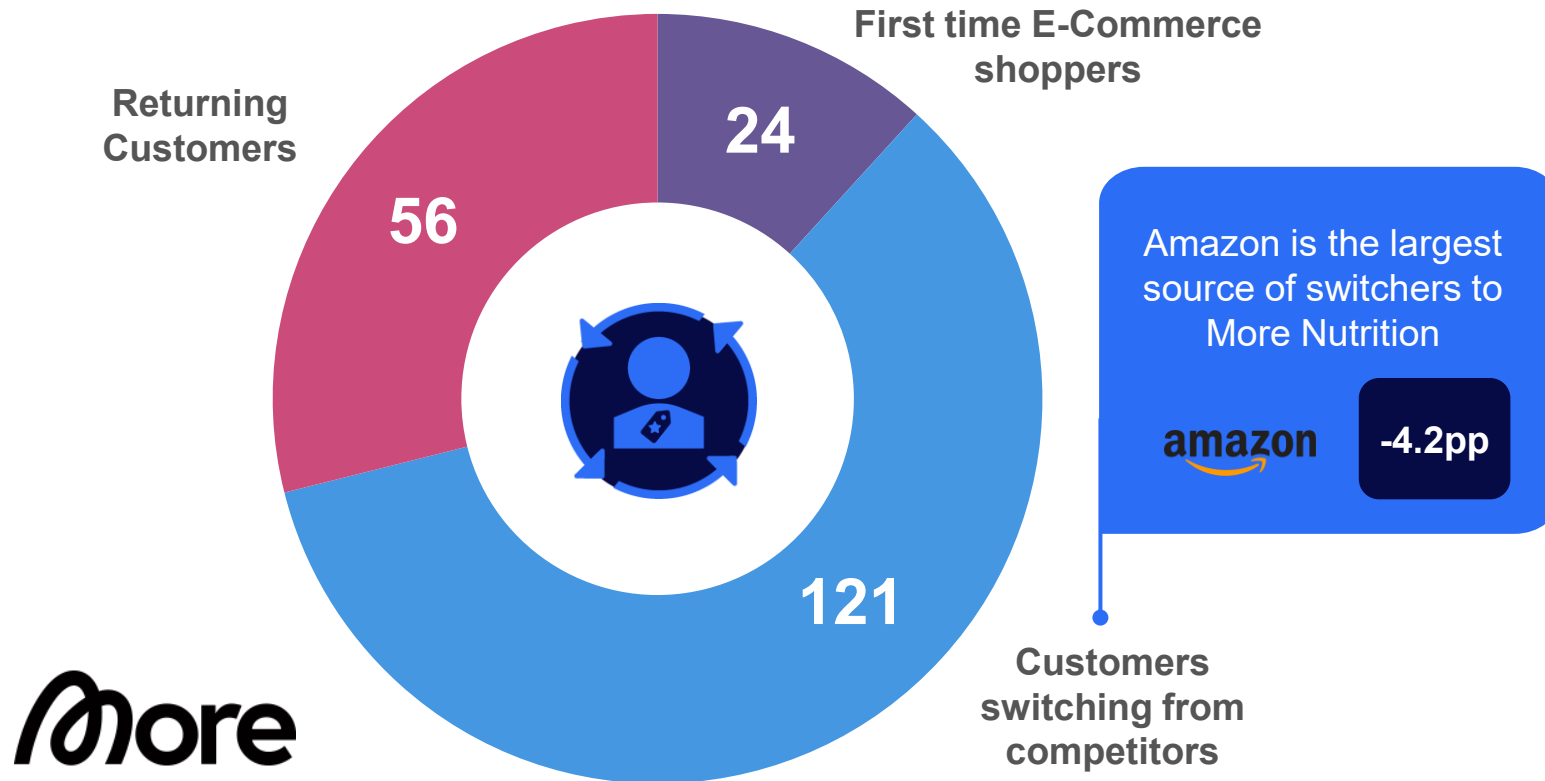
Source: NIQ Digital Purchases / Total E-Commerce Austria / L52W until 23 August 2026



More Nutrition's growth is driven by customers switching from competitors

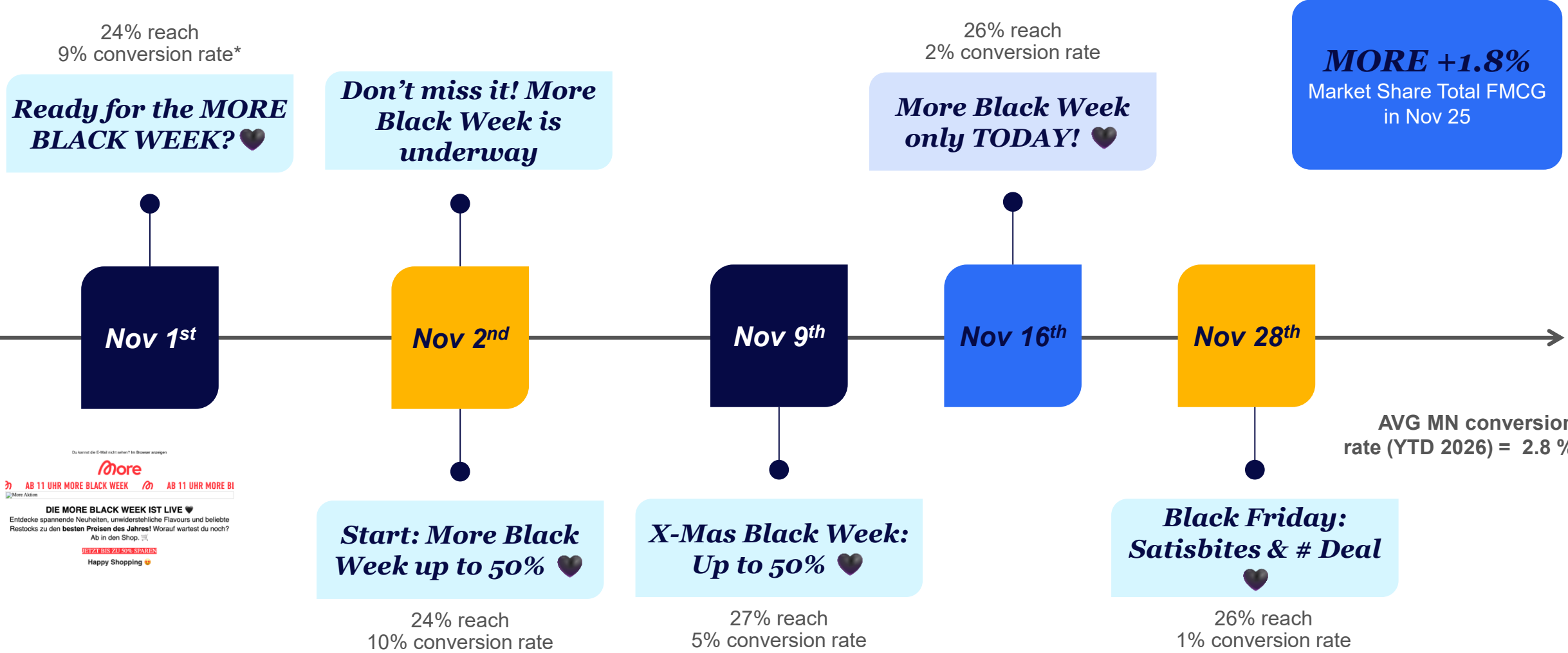
More Nutrition gained 1.1pp share and became Austria's #4 FMCG online retailer

More Nutrition's customer base by acquisition source



Source: NIQ Digital Purchases / FMCG E-Commerce Austria / 23.08.2024 - 22.08.2025 and 24.08.2025 - 23.08.2026

Early in November, MoreNutrition in Austria rolled out its MORE BLACK WEEK campaign, relying on intense emailing campaign to drive conversion ahead of rival Black Friday offers



Source: NIQ Digital Purchase e-commerce consumer panel. Inbox Intelligence | Reach is the % of CRM base targeted by the email // *panel conversion rate equals the % of panelists who received the email and made a purchase on the website within 48hrs.

Beauty dominated a softer Amazon Prime Day 2026 in Austria



Amazon Prime Day, Austria
23-26 June 2026

Nearly 50%
of Amazon Prime Day value
sales came from Beauty

Top Beauty Brands by value sales

 **Thierry Mugler**

 **Wella**

 **La Roche Posay**

Millennials over-indexed in Prime Day Beauty spending - *Share of Amazon Beauty value sales*

	YTD 26	Prime Day
Gen Z	22%	16%
Gen Y	38%	44%
Gen X	31%	30%
Gen B	9%	10%

#1

Beauty Product
during Prime Day 26



MUGLER
Alien 60ml
66.4€

Source: NIQ Digital Purchases / Total FMCG Austria / YTD until 23 August 2026

Prestige fragrance is being squeezed by three new sources of competition



Arabic Rooted



The dupe phenomenon spans a wide range of brands

Fashion Brands



Dupe Brands





+47%
values sales vs
2 years ago in
AT

#1 Fragrance Brand
on TikTok Shop in Europe

Source: NIQ Omnisaless Prestige / Austria / Last 52 weeks until 16/08/2026

Early TikTok Shop demand in Austria reaches well beyond Gen Z

TikTok Shop Austria | Launch-to-date: June – 23.08.26

Who is buying on TikTok Shop?



25% Gen Z



19% Gen Y



33% Gen X



23% Gen B

75%
of TikTok Shoppers
are not Gen Z

Top products by value sales

1



HISMILE
iD Stain Whitening Mouthwash
16.2€

2



MANSPOT
Body Groomer
22.7€

3



Kolymvari
5l Olive Oil
43.0€

Source: NIQ Digital Purchases / Total FMCG Austria / Launch to Date until 23 August 2026

Understanding demand is the first step - measuring impact is the next

- 1** *E-Commerce growth is increasingly event-led*
- 2** *New routes to purchase are redrawing competition*
- 3** *Loyalty must be actively earned in a price-driven market*
- 4** *Beauty reveals the speed of customer change*
- 5** *Growth needs to be measured holistically*



**TikTok is
entertainment that
drives impact that
transcends the
screen**



7 in 10

say TikTok has become their
go to for new brands/ products



Can TikTok drive incremental sales – and justify future investment?

- Media investment is under growing scrutiny
- Advertisers are under pressure to prove outcomes beyond platform metrics





1 THE OBJECTIVE

Determine whether TikTok drove **incremental in-store sales** in Austria

2 THE MOMENT

The campaign ran in Q1 2026 when people were more open to **trying new things**

Note: The video is shown for illustrative purposes only and does not represent the actual campaign creative.

The Solution: Proving Incremental Impact with NIQ



1 ACTIVATE

Campaign run on TikTok



2 COMPARE

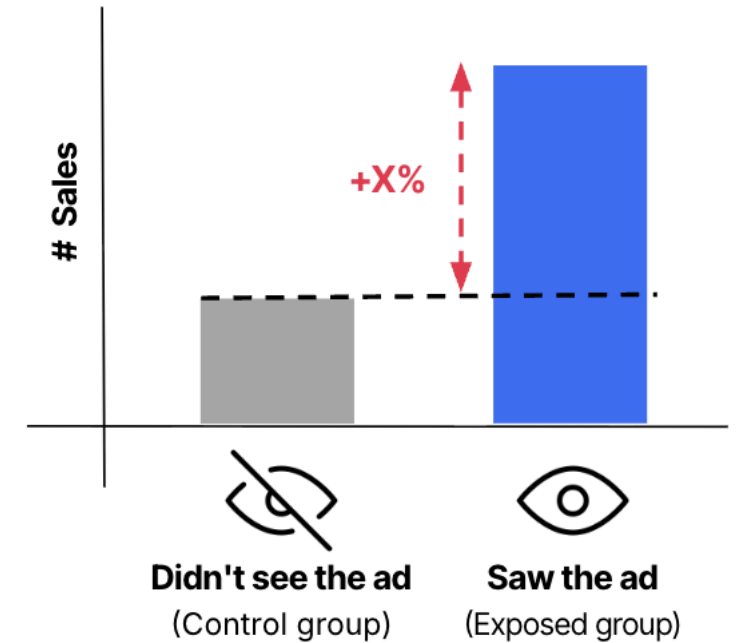
Match test and control regions at store level across Austria



3 MEASURE

Isolate TikTok's incremental sales impact

Incrementality



The Result: Validating TikTok as High-Impact Investment



2.9x

Incremental ROI
vs NIQ FMCG Benchmark

This campaign proved TikTok's incremental business impact and **built confidence for future investment.**

The Learnings: From Attention to Incremental Sales



Beyond Awareness

TikTok can drive measurable sales growth, not just brand outcomes



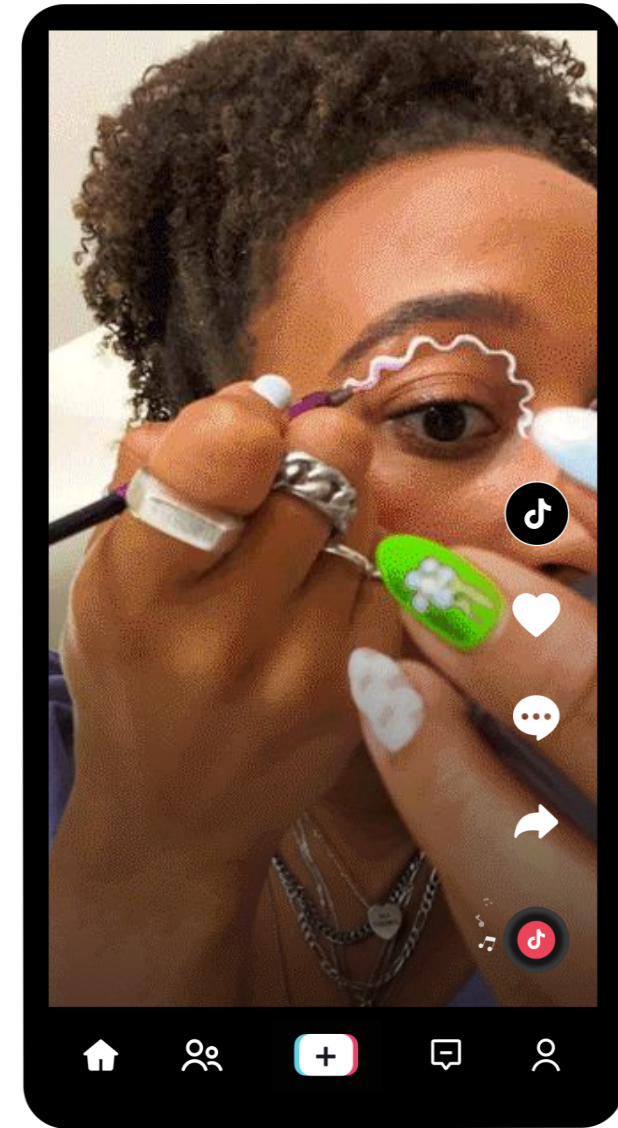
Prove Incrementality

NIQ Marketing Lift helps demonstrate what media truly adds.



Plan to Optimize

Early measurement planning helps identify growth levers and inform smarter investment decisions.



The Full View of Prestige Beauty

Now available in Austria

The Beauty of Data

The new NIQ Prestige Beauty Panel delivers the insights needed to navigate and grow in Austria's premium beauty market.



Turn market intelligence into growth opportunities



Insight Summit *Austria* 2027

k47
Vienna

14. September
2027

NIQ

Save the Date

