

Surveying the Landscape of a Post-TikTok World

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May 2025



TikTok is at a crossroads. After several years as a rising star in the social media universe, it's facing an existential crisis in its potential ban from U.S. operations. What does this mean for the social media landscape, and for small businesses that use TikTok in their marketing mix?

We'll tackle these questions in this report through numbers and narratives.

Level Set: Where Are We Now?

Before going into the analysis and answering the questions above, where are we now, and how did we get here? As we write this report, TikTok faces a looming June 19 deadline to establish an approved U.S. owner and divest itself from its current Chinese owner, ByteDance.

This deadline was an extension from TikTok's January 19th deadline to "divest or die", at least in the U.S. President Trump – fresh off his second-term inauguration – signed an executive order that gave TikTok a stay of execution by moving its deadline to June 19.

This has sent various interests scrambling to prepare for a potential permanent ban. For example, U.S. SMBs who market themselves on TikTok could be forced to reformulate their marketing mix. The same concept underpins TikTok's campaign to gain political favor.

For example, TikTok released a report in late 2024 that quantified its impact on U.S. small businesses as \$24.2 billion. This figure includes SMB revenue from TikTok marketing as well as the overall economic impact that revenue produces (jobs, local taxes, etc.).

During this interim period, vested interests are also jockeying for positioning. This includes TikTok competitors that are aligning themselves for the market-share land grab of a potential post-TikTok America. Millions of users and billions in ad revenue would be up for grabs.

Taking those factors one at a time, let's examine the SMB impact and the social media competitive landscape.



The SMB Marketing Vacuum

When examining the question of how SMBs will fare in a post-TikTok world, we've gathered expert opinions and our own market analysis. The short version is that there could be short-term transition pains, but in the end, SMBs will adapt and find alternatives.

Put another way, the void left by TikTok's U.S. departure will be filled by its competitors. And those competitors know it, as they move into positioning to fill as much of that vacuum as possible. These moves can already be seen, as we'll examine in the next section.

But to better answer this question of SMBs' post-TikTok orientation, Localogy reached out to 750 SMBs to ask them directly. The goal was to get a sense of the potential magnitude of shifting ad dollars by gauging what's happening today. How many use TikTok and how?

Starting with how many SMBs use TikTok for marketing purposes, our survey pegs it at 14 percent today – a relatively small but meaningful figure. To convert that to units, this represents about 2.8 million SMBs in the U.S., considering a total universe of 20 million SMBs.

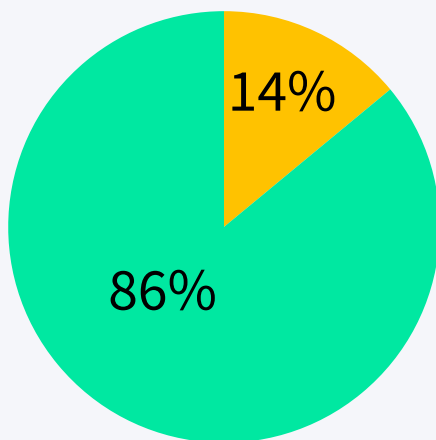
This means that if TikTok were to be banned, it would present a situation where 2-3 million SMBs could look to market themselves through other social channels. Most SMBs in that boat would indeed be compelled to look for alternatives, due to TikTok's revenue impact.

Specifically, among the 14 percent of SMBs who use TikTok as a marketing channel, a majority (61 percent) report that leads resulting from TikTok account for 1%-25% of their revenue. Even at the lower end of this range, SMBs will be driven to replace lost revenue.

Practically speaking, this means that at least 1.7 million SMBs (61 percent of the 2.8 million who report using TikTok) will likely be looking to find another social channel where they can move their marketing budgets. The question, as we'll explore in the next section, is where?

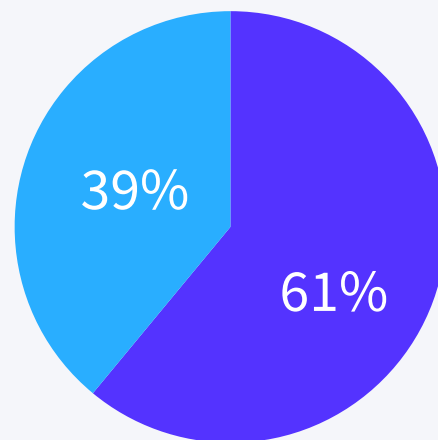
Do you use TikTok to promote and/or sell your products/services?

■ Yes ■ No



What percentage of your sales come from using TikTok?

■ 0% ■ 1% - 25%



 Localogy



The Land Grab

Moving on to the impact on TikTok's competitors, a key thought exercise we continue to entertain is who benefits most from TikTok's U.S. departure? Indeed, the company's 136 million U.S. users and \$11.8 billion in ad revenue will be up for grabs for everyone from Snap to Meta.

The biggest question is who's most advantaged in the ensuing land grab. Social media experts we interviewed point to Meta properties – both Facebook and Instagram – as well as others that have increasingly positioned themselves to be competitive with TikTok, such as YouTube.

"If we consider a scenario where TikTok is permanently banned in the U.S., it's clear that Instagram and YouTube stand to gain," noted Sarah Cucchiara, VP of Client Success at Tiger Pistol. "Our clients are already seeing impressive results with paid Instagram ads, and there's growing interest in leveraging YouTube Shorts. These platforms have advanced significantly, offering competitive features and capturing overlapping audiences."

Another consideration, according to Cucchiara, is an increasingly fragmented social media universe. More broadly, digital media continues to expand, including the latest crop of AI engines. These are on the list of competing interests for abandoned TikTok users and ad dollars.

"Beyond direct competitors like Instagram Reels and YouTube Shorts, we're also seeing a shift in how digital information is consumed more broadly," she told us. "The rise of AI-powered search engines like Perplexity, SearchGPT, Gemini, and Google's AI Mode is adding to the fragmentation. At Tiger Pistol, we're already noticing an uptick in inbound inquiries from these platforms, and it's shaping how we approach our channel and content strategies."



Odds-making Exercise

Synthesizing expert opinions and our own, we can perform an odds-making exercise on who's positioned best to fill a prospective TikTok void. We've organized that list into a few candidates and what positions them to absorb users and ad dollars in a TikTok vacuum.

Taking those one at a time...



META

Meta seems to be the frontrunner in a post-TikTok world. This traces back to its overall advantages and market share dominance. It simply has more surface area. We're talking Facebook and Instagram – the latter being the closest competitor, given its Reels feature.

That last part is important simply because the chances of inheriting TikTok's abandoned users are greater when offering something that looks and feels like TikTok. Similar can be said for some aspects of Snapchat, as well as YouTube Shorts – the ultimate TikTok clone.

Meanwhile, Meta is priming the pump for a post-TikTok world. After TikTok's temporary ban in January, it quickly added several new features to Instagram Reels. And it refined Instagram's search function to make it more like TikTok search – a Gen Z favorite feature.



GOOGLE

That brings us to Google. TikTok has taken a surprising amount of its search traffic as Gen Z has started to organically use it as a search engine. The point as it relates to this narrative: Google will see TikTok's U.S. demise as an opportunity to get some of that traffic back.

"Over the past few years, TikTok has surprised everyone by evolving into a go-to platform for search, especially among younger audiences," said Cucchiara. "It's shifted from being just a social platform to becoming a serious competitor in search. This has even extended to local search, often at Google's expense."



YOUTUBE

Speaking of Google, what about YouTube? Given that YouTube Shorts is a direct TikTok competitor – and YouTube is increasingly a social app – it's high on the list of beneficiaries of a post-TikTok America. Look for it to aggressively attract those orphaned users... and ad dollars.

Meanwhile, YouTube Shorts' place in the conversation recently elevated. In May, YouTube CEO Neil Mohan revealed that Shorts' revenue per watch hour is now equivalent to that of YouTube proper. And in Q1, Shorts viewership was up 25 percent year-over-year. It will be one to watch.



SNAP

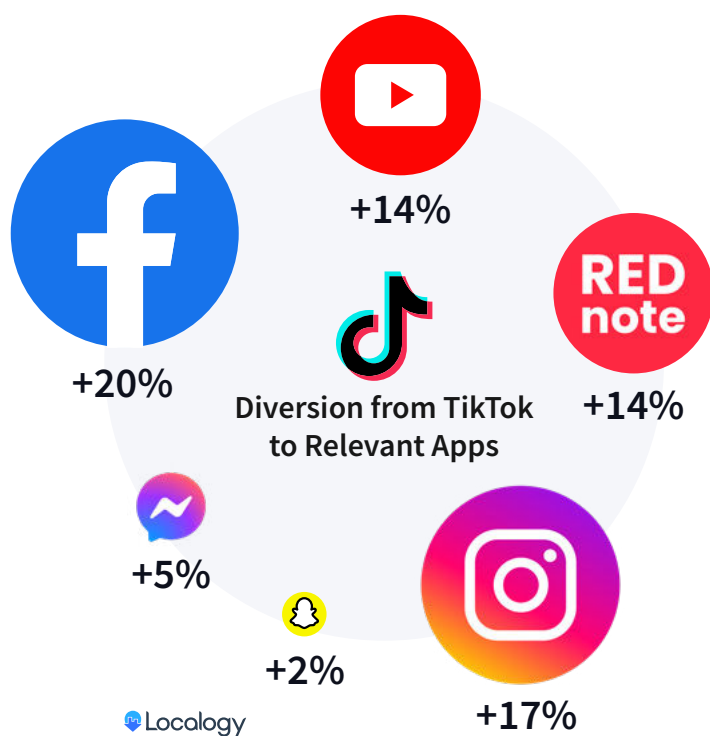
Though Snapchat isn't close to TikTok in terms of UX similarity, they're both Gen-Z staples. In fact, 70 percent of Snapchat users also use TikTok. This means that Snapchat stands to gain from a TikTok void. In fact, Evan Spiegel said as much during Snap's Q4 earnings call.

By the Numbers

Stemming from the above, perhaps the best prediction of a post-TikTok America was seen in the 14 hours that it went offline before Trump signed the aforementioned executive order. During that time, Facebook saw a 20 percent jump in traffic and Instagram saw a 17 percent jump.

To be clear, those figures are for users who quickly migrated to other platforms to get their social fix. But there was also a correlation in the activity of advertisers during that period. That's the common sequence: users colonize a given platform, before advertisers follow the eyeballs.

2025 TikTok Ban: Which Relevant Apps Got More Usage?



Quantifying the advertiser side of things, Tiger Pistol cites a Columbia Business School study, that says Facebook ad rates spiked 10 percent during that outage. Given that these are demand-driven ad marketplaces, the ad rates were clearly a result of rapid advertiser migration.

This is a valuable preview because if that degree of impact was seen in a 14-hour outage, we can extrapolate the proportional impact in the longer-duration aftermath of a permanent ban. Those who moved quickly on January 19 were only a segment of the advertiser population.



Back to SMBs...

Sticking with that last point, it's important to clarify that the rapid advertiser movement on January 19 wasn't necessarily SMBs. In fact, we surmise they represented a small share. Brands tend to move first with tech & media trends, followed by the long tail of SMBs.

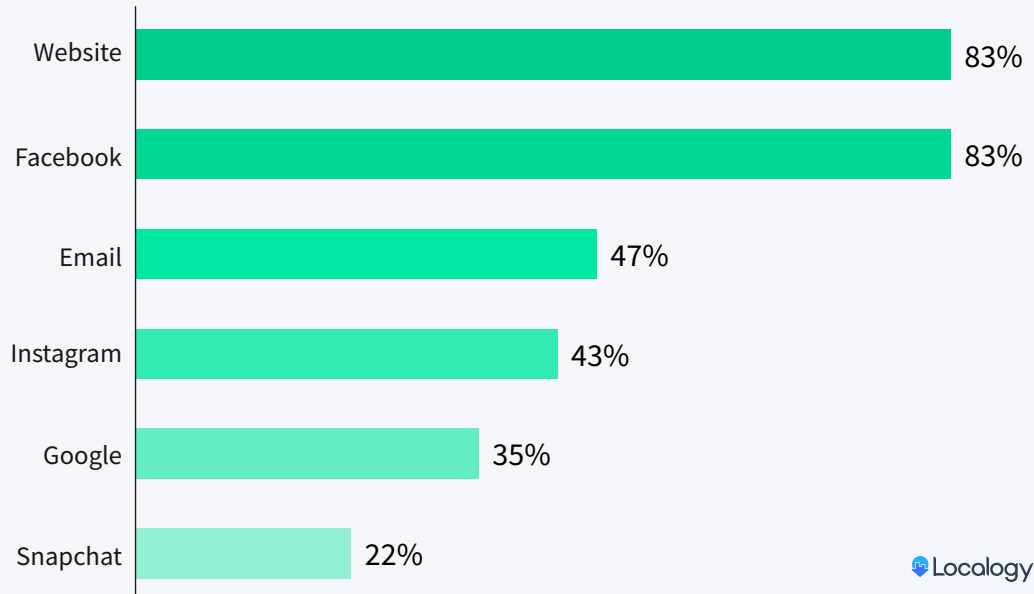
To summarize and synthesize a few points made so far, we can be fairly certain that if TikTok goes away, SMBs will find other places to put their marketing energy and expenditure. And that process will likely stretch out over months following any permanent TikTok U.S. ban.

But to better understand the potential SMB ad-dollar migrations we could see in a post-TikTok world, we once again turned to SMBs themselves. After asking the questions examined earlier (the use of TikTok and the revenue impact), we asked them what *other* channels they use.

And the results? For those who utilize TikTok in their marketing mix, the top other channels they use for marketing include websites (83 percent), Facebook (83 percent), email (47 percent), Instagram (43 percent), Google (35 percent), and Snapchat (22 percent).

The reason these other channels are important is that they indicate where SMBs have already developed comfort and competence. Therefore, they're most likely to capture the orphaned ad dollars from a TikTok ban, versus new channels small businesses have to take time to learn.

What other apps or services do you use to promote and/or sell your products/services?





Insulated Position

That last part – having to learn new platforms and processes – is a key consideration for SMBs. In fact, when examining a potential TikTok U.S. ban, a question emerges: how can they insulate themselves from its negative impacts? – not only finding new tools but demand pricing?

On both counts, social media marketing platforms can be that insulation layer. For example, one of the things that Tiger Pistol does well is offer a well-diversified mix of social marketing channels that are optimized on behalf of local businesses – both SMBs and MULO brands.

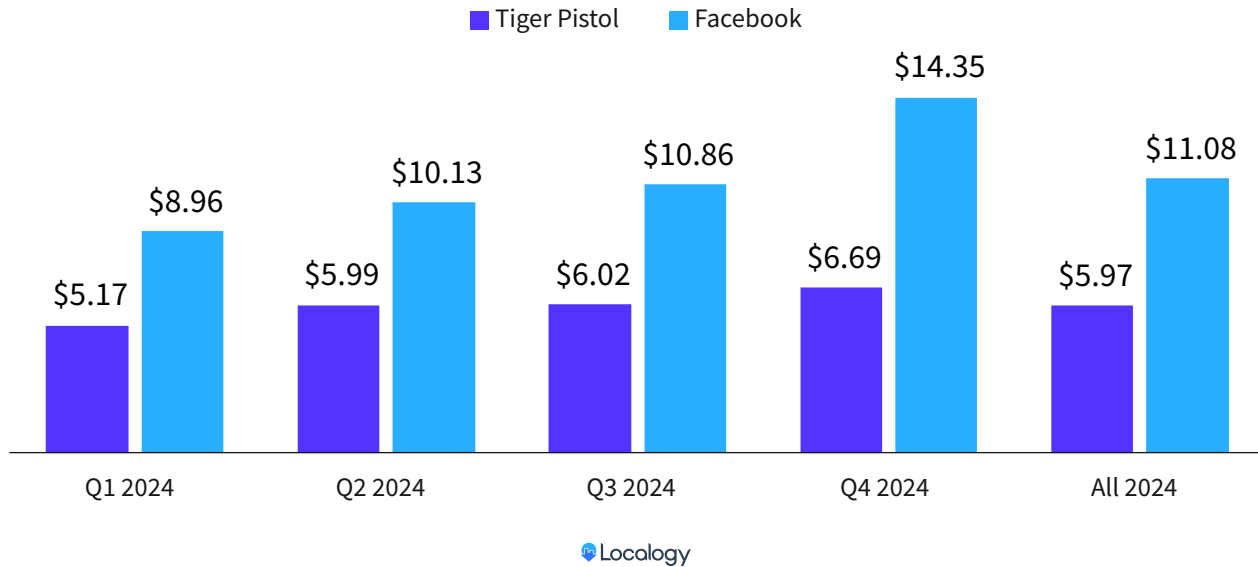
These platform benefits manifest in several ways that we won't get into in this report. But they also shine in this report's context in terms of being able to shield local businesses from volatility. And as quantified throughout this report, a post-TikTok scramble will be nothing if not volatile.

But with marketing activity spread across several channels, any given local business operating on TikTok would see a diluted version of collateral damage from its deportation. Here, the risk-management virtues in diversifying anything – from stocks to marketing channels – apply.

That insulated position will play out in a few ways. For one, there will be fewer headaches in the process of establishing oneself in other social channels, as Tiger Pistol takes care of that. Two, there's less impact in ad-rate price hikes from sudden spikes in demand, as seen in January.

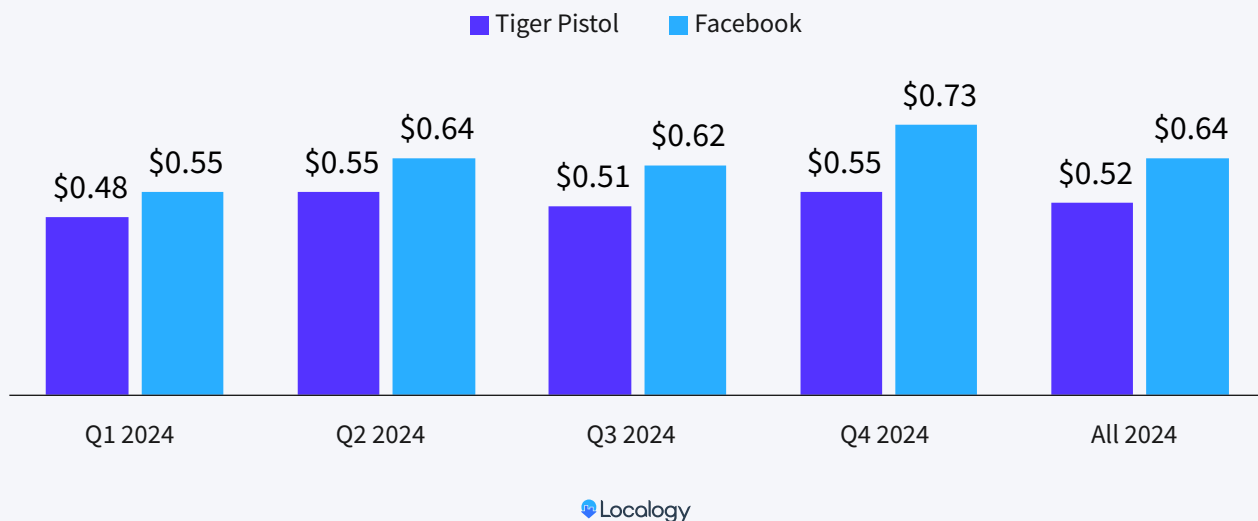
Average CPM by Quarter (2024)

Tiger Pistol vs. Facebook
(Cost-Per-One-Thousand-Impressions)



Average CPM by Quarter (2024)

Tiger Pistol vs. Facebook
(Cost-Per-Click)



The above charts from Tiger Pistol quantify its aggregate ad rates versus Meta. Covering CPMs and CPCs, it demonstrates how a diversified position can offer local businesses a more cost-efficient way to navigate a post-TikTok world.



Conclusion

Though anything can happen in a post-TikTok America, it's a valuable thought exercise to game it out. And from that exercise, we can see a few likely scenarios. If a TikTok ban becomes permanent, marketers – including SMBs – will adapt and find alternative promotional channels.

And in that same scenario, the largest and most likely beneficiaries are likely Instagram, Facebook, YouTube, and Google. Notably, those four marketing channels are owned by two companies, so we're really talking about the lion's share of winnings for Alphabet and Meta.

Meanwhile, we'll be following this story closely and its many moving parts. It will be a moving target up to – and likely after – June 19. That's when the real activity begins or another extension is granted.

About Tiger Pistol

Tiger Pistol is a premier local advertising platform designed to streamline and simplify localized advertising through the power of automation. With a focus on three core pillars - scale, simplicity, and performance - Tiger Pistol helps franchises, multi-location brands, and marketing resellers efficiently manage and optimize digital advertising campaigns. The platform automates complex tasks, allowing users to effortlessly execute large-scale, locally relevant campaigns across top digital channels like Facebook, Instagram, TikTok, and Amazon. This automation not only enhances the ease of use but also drives superior advertising performance, making effective local marketing accessible to all levels of expertise. Learn more by visiting TigerPistol.com, or following on [Twitter](#), [Facebook](#), or [LinkedIn](#).



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