

BLACK ADS AGENCY

Senior TikTok LIVE Partner · MENA · Europe · North America

MARKET INTELLIGENCE REPORT

VOLUME 01 — TUNISIA

Social Media · TikTok · TikTok LIVE

Official data · Verified sources · Market analysis

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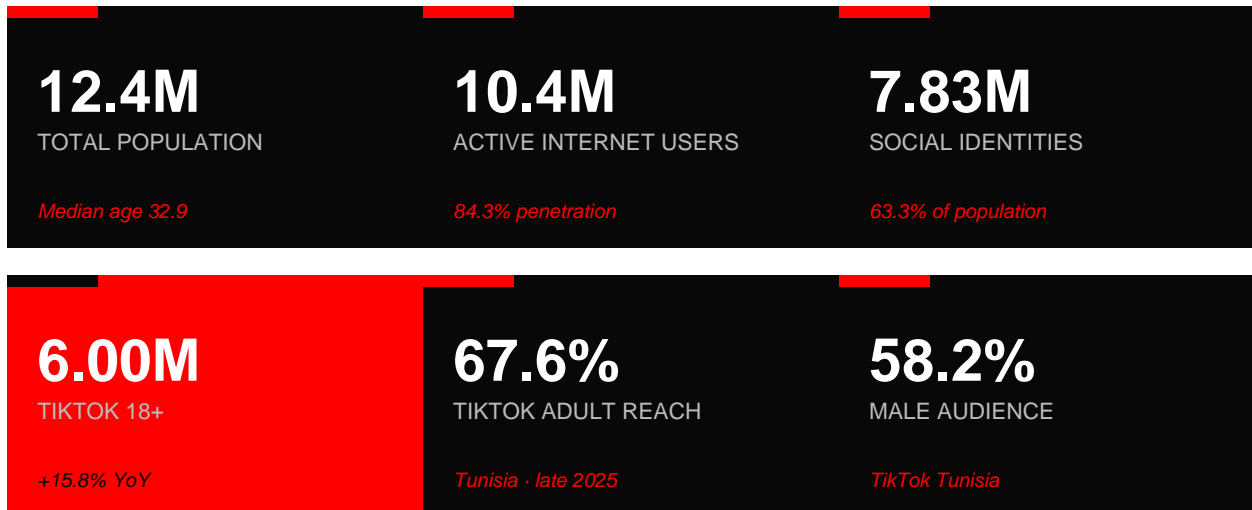
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ABOUT THIS EDITION

This report opens a series dedicated to MENA markets within the TikTok ecosystem. Volume 01 covers Tunisia; Algeria, Morocco, Egypt and the GCC (Saudi Arabia) will follow. Each volume applies a funnel logic — digital macro → social media → TikTok → TikTok LIVE — and draws exclusively on primary sources (DataReportal/Kepios, World Bank, GSMA Intelligence, Ookla) and recognised sector analyses. The aim is to deliver a clear, dated and actionable market read.

01 Executive summary

Tunisia displays a mature digital market profile — atypical for North Africa — with 84.3% internet penetration and a social media usage rate that reaches 75.2% of internet users. Within this context, TikTok stands out as the platform with the strongest growth momentum, supported by a mobile infrastructure undergoing rapid modernisation.



MARKET READ IN 5 POINTS

- 01 A mature digital market under economic pressure.**

Tunisia combines high connectivity (84.3% internet penetration, median mobile speed of 67.12 Mbps, up +153% year-on-year) with a strongly digital young population. But GDP growth remains weak (+2.5% in 2025) and youth unemployment reaches 38% — making the creator economy a real and growing economic outlet.
- 02 TikTok consolidates its dominant position among adults.**

With 6.00M adult users at end-2025 — 67.6% of the 18+ population — TikTok now overtakes Instagram (3.65M) in ad reach. Facebook still leads in raw reach (7.80M), but TikTok captures attention and screen time among the under-35s.
- 03 A two-speed growth trajectory re-accelerating in 2025.**

Adult reach grew +15.8% between early and late 2025 (5.18M → 6.00M), following a temporary dip in late 2024 attributed to ad-platform corrections. The market is in a clear expansion phase.
- 04 TikTok LIVE as the primary direct monetisation lever.**

The Creator Rewards Program is not available in Tunisia. Direct creator revenue therefore flows mainly through LIVE gifts and B2B partnerships — placing LIVE streaming at the heart of the local creator economy.

05 A market in structural transition.

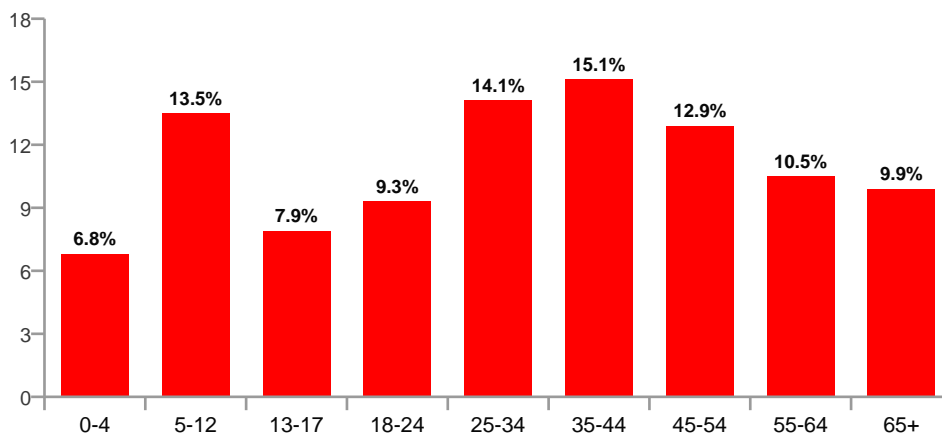
Accelerating mobile speeds, the gradual arrival of LIVE Shopping and the professionalisation of local creators are converging toward a more structured Tunisian creator economy from 2026-2027 onward.

02 Country context

DEMOGRAPHICS & POPULATION PROFILE

Tunisia had **12.4 million inhabitants** at the end of 2025 according to the United Nations, with modest population growth (+0.6% YoY). The population is **71.3% urban**, concentrated mainly around Greater Tunis and the coastal strip. Median age stands at **32.9**, and the country shows an age structure favourable to heavy video-platform usage: 9.3% aged 18-24, 14.1% aged 25-34 and 15.1% aged 35-44. The 13-44 cohort represents approximately 46% of the population — close to 5.7M people — the demographic core of the TikTok audience.

Population distribution by age bracket (%)



Source: United Nations / DataReportal Digital 2026, October 2025 data

ECONOMIC CONTEXT

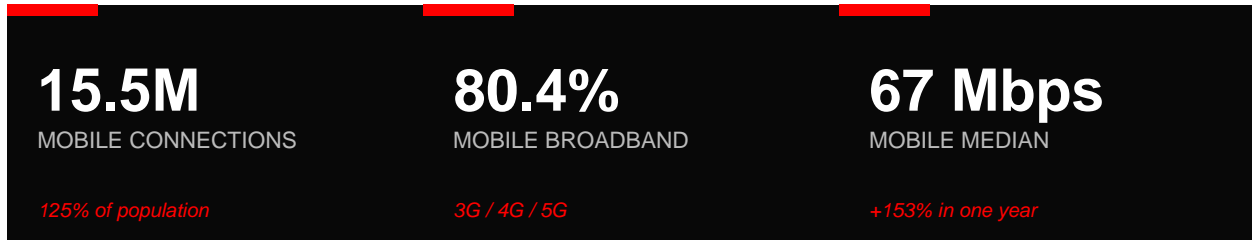
The Tunisian economy remains in slow growth. GDP expanded by **+2.5% in 2025**, supported by an agricultural rebound, the components industry and private consumption, but stays below its pre-Covid level. Unemployment stands at **15.2% in Q4 2025** (down from 16.5% a year earlier), while youth unemployment among 15-24-year-olds reaches **38%** according to the World Bank. This pressure on youth employment structurally explains the appeal of the creator economy as an alternative or supplementary income stream — a decisive factor in reading this market.

NATIONAL DIGITAL STRATEGY

The Tunisian government has placed digital transformation at the heart of its strategy through the "Digital Tunisia 2025" national plan. This policy has driven the modernisation of telecom infrastructure and the training of approximately **65,000 annual higher-education graduates, of which ~16% in ICT fields**, building a mature technical talent pool that supports the adoption of new digital usages.

03 Digital infrastructure

Tunisia's digital infrastructure ranks among the most advanced in North Africa and forms the foundation that makes intensive TikTok and LIVE streaming usage possible. Connection speeds went through a spectacular acceleration in 2025.



MOBILE CONNECTIVITY

GSMA Intelligence counts **15.5M active cellular connections** at end-2025 — 125% of the population, a signal of strong multi-device equipment (secondary SIM cards, eSIM, professional usage). Mobile "broadband" connections (3G/4G/5G) reach **80.4%**. The market is led by three operators (Ooredoo, Orange, Tunisie Telecom) engaged in pricing competition that favours heavy data usage.

INTERNET SPEEDS — A HISTORIC ACCELERATION

Ookla measures a median mobile download speed of **67.12 Mbps** (August 2025), up **+153%** over 12 months. Fixed broadband also progresses, to 16.99 Mbps (+60.6%). This improvement is critical for LIVE streaming: it reduces technical friction on the creator side (broadcast quality, latency) and on the viewer side (extended consumption, real-time interactions without buffering).

INTERNET USAGE

10.4M Tunisians used the internet in October 2025, i.e. 84.3% of the population. The country ranks among North African leaders in internet penetration, ahead of Morocco (92.2%, but on a larger demographic base) and well ahead of Egypt (82.7%). Around 1.95M Tunisians remain "offline", mostly older or rural — a limited but structural growth reserve.

Indicator	Tunisia	Morocco	Egypt	Saudi Arabia
Population (M)	12.4	38.5	118.7	34.7
Internet users (M)	10.4	35.5	98.2	34.4
Internet penetration	84.3%	92.2%	82.7%	99.0%
Social identities (M)	7.83	22.8	51.6	38.6
TikTok 18+ (M)	6.00	16.7	48.8	38.6

Regional comparison · Source: DataReportal Digital 2026, October 2025

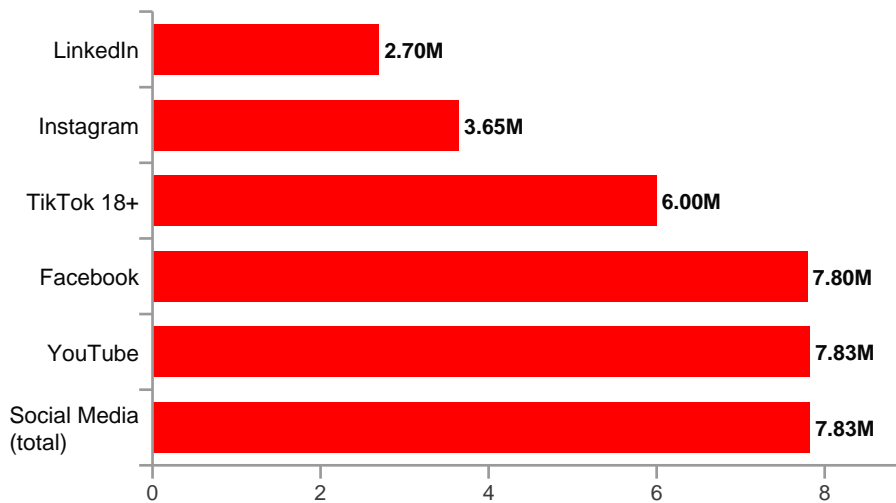
04 Social media landscape

The Tunisian social landscape is dominated by Meta (Facebook + Instagram), but shifted in 2024-2025 toward a co-dominance with TikTok, which now closes in on Facebook in adult audience.

VOLUME AND REACH BY PLATFORM (LATE 2025)

Kepios identifies **7.83M active social identities** in Tunisia in October 2025, i.e. **63.3% of the population** and 75.2% of internet users. YoY growth is strong (+9.5%, +680k identities), driven by TikTok and by Instagram's rise among younger adults.

Advertising audience by platform in Tunisia (millions, late 2025)



Source: DataReportal Digital 2026 · Native ad-tool data (Meta, Google, TikTok, LinkedIn) — October 2025

PLATFORM-BY-PLATFORM READ

FACEBOOK · 7.80M

Remains the platform with the widest ad reach (+9.1% YoY). Penetration on the 13+ eligible population reaches 79.1%, and 87.3% of adults. The dominant platform for groups, informal commerce and community communication — but is progressively losing engagement among under-30s.

YOUTUBE · 7.83M

Sharply rising ad reach (+11.7% YoY, +820k). Heavily used for passive music and entertainment consumption, but with a low community and LIVE share. Gender parity (50/50).

TIKTOK 18+ · 6.00M

The big winner in value terms: +15.8% over the year 2025. Now dominates attention share among 18-34-year-olds. Male audience (58.2%) — a Tunisian specificity versus global averages (where the M/F gap is narrower).

INSTAGRAM · 3.65M

Sustained growth (+12.3% YoY). 52% female audience, heavily represented in the 18-24 segment (+1.17M women in this segment). The reference "beauty / fashion / lifestyle" platform among young urban women.

LINKEDIN · 2.70M

+12.5% YoY (~+300k members). A useful indicator of the structured professional fabric and the addressable B2B share. The platform remains constrained by the size of the informal sector (66% of employment).

MESSANGER (HONOURABLE MENTION)

Though not measured in ad reach, Messenger remains the dominant messaging channel among the 25+, ahead of WhatsApp in some segments. Worth integrating into direct-communication strategies.

SHARE OF ATTENTION

Beyond ad reach, share of attention is the key indicator for assessing the monetisable potential of a platform. According to DataReportal Digital 2026, TikTok holds **the highest average daily time per user worldwide** (~55 minutes/day). In Tunisia, observed patterns converge toward 60-90 minutes per day among active users.

ENGAGEMENT TRENDS

Several signals observed in 2024-2025 confirm the inflection:

- Explosive growth in the short-video format (TikTok + Instagram Reels) among Tunisian creators: viewership up roughly **+130% YoY** according to several influence trackers.
- Bilingualism between Arabic-darija and French dominates content with strong local engagement. Pure Arabic content also reaches the MENA diaspora, amplifying cross-border potential.
- Major seasonal peaks: Ramadan (consumption +30 to +40%), Eid, back-to-school and summer tourism.
- Rapid emergence of sponsorable categories: beauty, gaming, food, personal finance, real estate, automotive.

GENDER SPLIT — A STRATEGIC KEY

At the level of global social identities, Tunisia shows a slight imbalance (46.5% female vs 53.5% male). But this ratio masks strong platform-level disparities: Instagram skews female (52% F), while TikTok is markedly male (58.2% M). This asymmetry has direct implications for the creator ecosystem and for content category strategy.

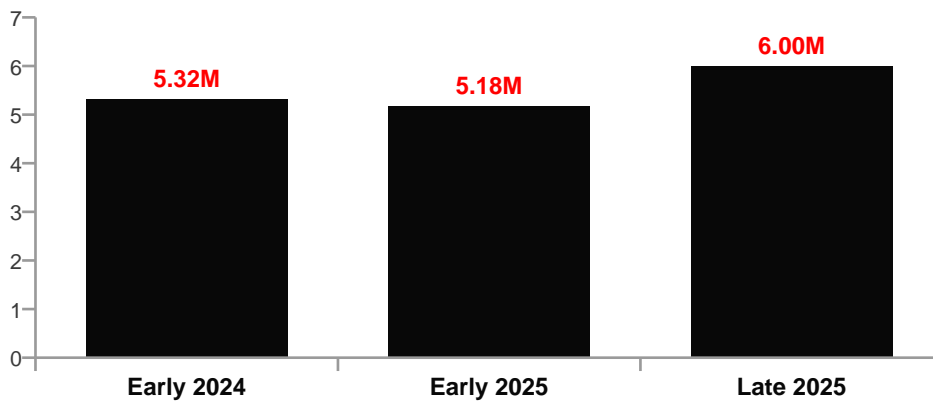
05 TikTok deep dive

TikTok has established itself in Tunisia as the most dynamic platform in the social landscape, with a growth trajectory that has doubled in pace since the second half of 2025.

AUDIENCE — 6 MILLION ADULTS

TikTok's ad planning tools count **6.00M users aged 18+** in Tunisia at end-2025, i.e. **67.6% of adults**. If 13-17-year-olds are added (not published by TikTok but estimated by DataReportal at between 800k and 1.2M), total reach approaches 7 million — essentially the entire Tunisian connected social audience.

TikTok adult audience evolution in Tunisia



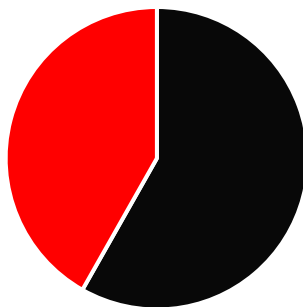
Sources: DataReportal Digital 2024, 2025 and 2026 — TikTok ad planning tools

READING THE CURVE

Q4 2024 saw a temporary decline (-7.9% between October 2024 and January 2025), interpreted as an ad-platform "correction" effect (inactive-account cleanup) rather than a real drop in usage. The **clear rebound in 2025** (+820k users over the year) confirms that the platform is in an active expansion phase in the Tunisian market.

TIKTOK AUDIENCE PROFILE

A male-skewed audience



Male 58.2%
 Female 41.8%

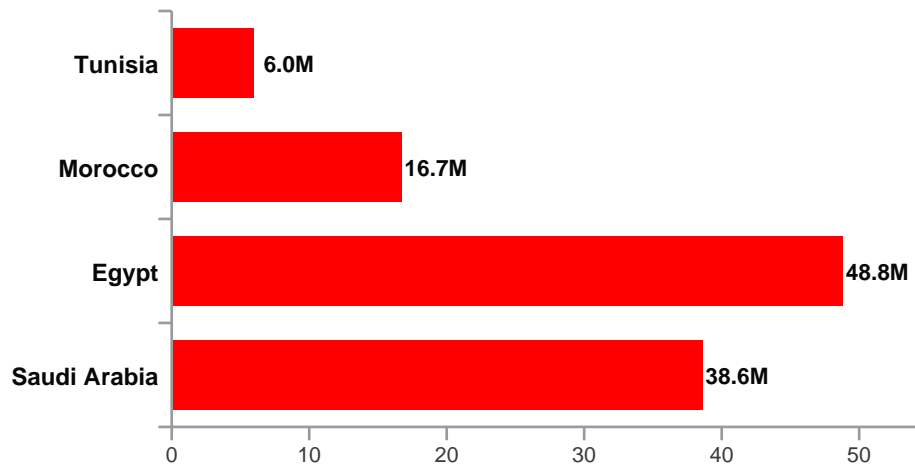
With 58.2% men and 41.8% women, TikTok Tunisia follows the MENA pattern where the M/F gap is more pronounced than in Europe or North America. Observed implications:

- Male-led categories are over-represented (gaming, sport, automotive, debate)
- Female creators are under-represented — a growing niche
- LIVE PK (battles) — heavily male — finds fertile ground here

TUNISIA'S REGIONAL POSITIONING

Within the MENA ecosystem, Tunisia is a modest-sized market but with high unit penetration:

TikTok 18+ audience — MENA comparison (millions of users, late 2025)



Source: DataReportal Digital 2026 · TikTok ad planning tools

However, in terms of **penetration rate on the adult population**, Tunisia ranks among the most mature MENA markets (67.6%), just behind Saudi Arabia (which exceeds 100% due to duplicated accounts and expatriate populations). This maturity explains why the country regularly serves as a pilot market for new TikTok features deployed in the region.

DOMINANT CONTENT CATEGORIES

Qualitative analysis of top Tunisian creators (Favikon, Kapitalis, StarNgage rankings) reveals several saturated categories and several niches with strong potential:

Category	Maturity	Creator volume	LIVE density
Humour / sketches	Saturated	High	Medium
Music / covers	Mature	High	Strong (LIVE concerts)
Gaming	Mature	Medium	Very strong (PK, tournaments)
Beauty / fashion	Growing	Medium	Strong (haul, tutorials)
Food / cooking	Growing	Medium	Medium
Lifestyle / couples	Growing	High	Strong (Q&A, daily)
Sport / fitness	Emerging	Low	Very strong (coaching)
Education / languages	Emerging	Low	Strong (LIVE classes)
Personal finance	Niche	Very low	Very strong
Diaspora / travel	Niche	Medium	Strong

Qualitative read — May 2026

TOP TUNISIAN CREATORS - SNAPSHOT

The Favikon 2025 top 5 ranking (Douha Laribi, Rahma Laribi, Hagani, Ghofran Khmiri, Ayoub Meftah) illustrates a market trait: **short-video creators are not all LIVE creators**. The LIVE skill set — which demands stamina, interactivity and discipline — is still concentrated in a narrow subset. It is precisely this skill that separates the viral creator from the professionally monetisable LIVE streaming creator.

It is also worth noting that Karim Kroubi, recognised at the **2024 Digital Creator Awards in Qatar** as "best live content creator", illustrates the regional recognition starting to emerge around Arabic-language LIVE.

06 **TikTok LIVE**

TikTok LIVE is the most accessible direct monetisation channel in Tunisia, given the absence of Creator Rewards Program (CRP) eligibility. This section describes the global economic mechanisms, their adaptation to the Tunisian market and the order of magnitude of the potential.

GIFT MECHANICS — MODEL REMINDER

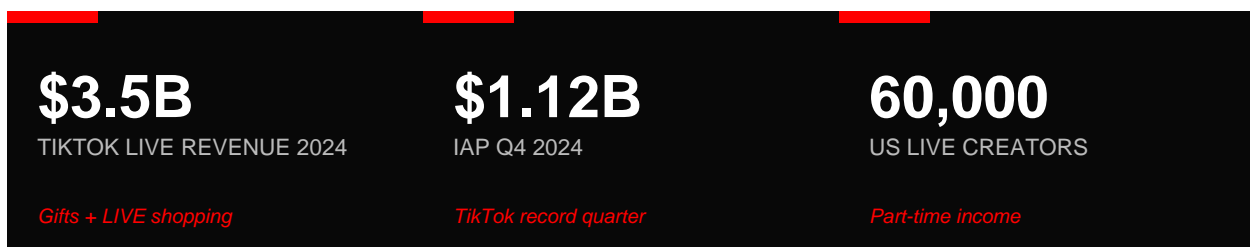
Viewers buy "coins" which they convert into virtual gifts sent during LIVE. On the creator side, gifts are counted in "diamonds", a fraction of which is then converted into cash. Since the update to TikTok's rewards model, a creator can now reach **up to 53% of the post-TikTok gross** through two stacking mechanisms:

Component	Cap	Conditions
Per-LIVE missions	40%	Average session duration + new unique followers
Weekly missions	13%	Valid days ≥25 min + Creator League + active fans
Maximum total	53%	Stacked combination of the two mechanisms

Source: TikTok Creator Rewards Model — Black Ads Agency operational data (live-income-calculator)

Before this update, the classic split was 50% to the creator (after TikTok's take). The new model rewards consistency (valid days, session duration) and audience growth (new followers, active fans) rather than gift volume alone. **The operational reference rate** used for projections is **USD 0.005 net to the creator per diamond**, before agency commission.

GLOBAL ORDER OF MAGNITUDE



According to an Ipsos study commissioned by TikTok (June-July 2025), **more than 60,000 US-based LIVE creators** earned more in 2025 than the median income of a part-time job, from gifts alone. 68% of TikTok users have already tried gifting, and 50% say they intend to gift in the next 30 days. LIVE has therefore become structurally a mainstream channel — not a niche.

CREATOR INCOME BRACKETS — GLOBAL BENCHMARKS

On global benchmarks (Teleprompter / Amra & Elma, specialised agencies), an active LIVE creator typically earns between **USD 1,500 and 40,000/month** in gifts, with average sessions of 16 minutes (top streamers sustain >25,000 concurrent viewers). For an order of magnitude applicable to Tunisia: a creator receiving 200,000 diamonds/month generates a post-TikTok gross of approximately **USD 920** at a 46% rewards rate — a T2 partner tier level on the Black Ads Agency operational framework. The top Tunisian streamers, lifted by diaspora viewers, go well beyond this threshold thanks to battle pots and tier acceleration.

TUNISIAN MARKET-SPECIFIC CONSTRAINTS

No Creator Rewards Program (CRP).

Tunisia is not eligible for the views-based CRP. Direct TikTok revenue for a Tunisian creator therefore necessarily comes through: (1) LIVE gifts, (2) B2B sponsorship, (3) TikTok Shop affiliation (still very limited in the region).

Payment friction.

TikTok pays in USD via PayPal or international wire, which complicates repatriation in a country subject to currency controls (BCT). Many creators rely on intermediary structures to formalise their income.

Mainly domestic audience.

Aside from specific cases (diaspora, neutral Arabic-language content), a Tunisian creator earns mostly from gifts sent from Tunisia or the diaspora — i.e. on relatively modest average purchasing power compared with US, GCC or UK markets.

Regulation and social perception.

LIVE streaming has been the subject of public debate in Tunisia regarding its monetisation and tax treatment. The official agency structure (TikTok Senior Partner) is an important legitimising factor for the profession.

THE "DIASPORA" LEVER

Tunisian creators targeting the MENA diaspora in Europe (France, Italy, Germany) and the GCC enjoy monetisation potential above the local average, because their viewers send gifts in hard currencies. This cross-border dimension is one of the structural strengths of the Tunisian market: the country exports its digital culture to its high-purchasing-power diaspora.

THE STRUCTURING ROLE OF AGENCIES

Official TikTok LIVE agencies (Standard and Senior Partner statuses) play a critical role in professionalising the market. They handle: (1) creator training on LIVE mechanics, (2) the setup of regular broadcast schedules, (3) administrative and tax management, (4) access to TikTok promotional programs. The regional ecosystem counts approximately **1,650 active TikTok agencies** (analysis of the TikTok MENA professional Lark group), but only a fraction holds the Senior status, which creates a significant quality asymmetry in the market.

07 Outlook 2026 — 2027

Based on observed growth rates (+15.8% YoY on TikTok 18+ audience, +9.5% on social identities, +153% on mobile speed) and the progressive widening of TikTok LIVE features (LIVE shopping, subscriptions, AR effects), the following trajectories appear reasonable:

Indicator	Late 2025	End-2026 projection	End-2027 projection
TikTok 18+ audience	6.00 M	6.8 – 7.0 M	7.5 – 8.0 M
Reach 18+ (%)	67.6%	~75%	Plateau ~80%
LIVE usage rate	Moderate	Expected growth	Mainstream
Active LIVE creators (est.)	~3,000	5,000 – 7,000	10,000+
Median mobile speed	67 Mbps	100+ Mbps	150+ Mbps (5G)

Projections based on observed historical trends

EXPECTED TRANSFORMATION DRIVERS

Gradual 5G rollout.

Median mobile speeds should cross the 100 Mbps threshold in 2026 and reach 5G tiers in 2027. Multi-camera LIVE and LIVE Shopping become technically standard on smartphones.

Potential arrival of TikTok Shop in MENA.

TikTok Shop is not yet officially launched in Tunisia, but regional expansion is anticipated. This opening would radically transform the creator economy by adding direct commerce to existing revenue streams (gifts + sponsorship).

Accelerated professionalisation of the creator profession.

With youth unemployment at 38% and economic pressure on households, the LIVE creator profession is shifting from hobby to structured professional activity, with effects on training, taxation and collective organisation.

Emerging regulatory framework.

Tunisian public debate around creator income taxation and LIVE content control is set to take shape between 2026 and 2027. Official agencies will be on the front line translating these developments into operational practice.

Emergence of a trans-Maghreb creator market.

Cultural convergence between Tunisia, Algeria and Morocco — accelerated by TikTok's algorithms — hints at the emergence of a unified trans-Maghreb creator market, which changes the scale of the addressable audience.

08 Sources & methodology

METHODOLOGY

This report aggregates data from primary official sources (DataReportal/Kepios reports produced with Meltwater and We Are Social, World Bank, GSMA Intelligence, Ookla, ITU) and from recognised secondary sources (Statista, Tubefilter, Favikon, influence rankings). Figures shown prefer the most recent versions — typically October 2025 for TikTok and Meta data. Projections are estimates based on historical trends.

METHODOLOGICAL LIMITATIONS

Several caveats apply:

- The "ad reach" figures published by platforms (TikTok, Meta) are not equivalent to MAU (Monthly Active Users). They represent the addressable ad target, which may be lower or higher than real active users.
- TikTok does not publish figures for 13-17-year-olds in its ad tools. Total audience is therefore underestimated.
- Social identities (DataReportal) are not de-duplicated across platforms: the same user can be counted on several networks.
- Year-on-year comparisons must account for ad-tool "corrections" (removal of inactive / duplicated accounts).

PRIMARY SOURCES

Organisation	Reference	URL
DataReportal / Kepios	Digital 2025 Tunisia, Digital 2026 Tunisia	datareportal.com/reports/digital-2026-tunisia
DataReportal	Digital 2026 Morocco / Egypt / Saudi Arabia (comparison)	datareportal.com/reports
World Bank	Tunisia Overview, Country Economic Outlook 2025	worldbank.org/en/country/tunisia
FRED / World Bank	Youth Unemployment Rate Tunisia	fred.stlouisfed.org/series/SLUEM1524ZSTUN
GSMA Intelligence	Mobile connections Tunisia	gsmaintelligence.com
Ookla	Speedtest Global Index — Tunisia	ookla.com
Tubefilter / Ipsos	TikTok LIVE Virtual Gifting Study 2025	tubefilter.com (Dec 2025)
BizReport	TikTok Statistics 2026	bizreport.com/business/tiktok-statistics
Teleprompter.com	TikTok Marketing Statistics 2025	teleprompter.com/blog/tiktok-marketing-statistics
Amra & Elma	Top TikTok Statistics 2025	amraandelma.com/top-tiktok-statistics
Black Ads Agency	TikTok LIVE Income Calculator (rewards model)	black-ads.agency/tools/live-income-calculator
Favikon	Top 20 TikTokers in Tunisia 2025/2026	favikon.com/blog/top-tiktokers-tunisia
Kapitalis	Top 20 TikTokers in Tunisia 2025	kapitalis.com
StarNgage	Top 1000 TikTok Influencers in Tunisia	starngage.com
TikTok Newsroom	TikTok Live Creator Networks & Agency Program	tiktok.com/live/creator-networks
ResourcEra	TikTok Revenue (2018-2027): Ad, In-App Purchases	resourcera.com/data/social/tiktok-revenue

ABOUT

BLACK ADS AGENCY

Black Ads Agency is an official **Senior TikTok LIVE Partner**, operating since December 2024 and certified as Senior since May 2025. The agency supports creators across **MENA (including the Gulf), France, Italy, Germany, the United States and Canada**.

A PROPRIETARY INFRASTRUCTURE — BLACK OS

Black Ads operates on **Black OS**, its fully autonomous in-house management system — a rarity within the African TikTok LIVE agency ecosystem. Black OS covers the entire operational chain: creator CRM, algorithmic scouting, bonus and tier tracking, communication automation, TikTok Login Kit integration, real-time manager dashboard, and a daily action-recommendation system.

This infrastructure allows Black Ads to manage around a hundred creators simultaneously across five markets, with a level of personalisation and responsiveness that standard industry tools do not support. This dual identity — agency operator and editor of its own system — defines Black Ads' positioning within the ecosystem.

STATUS	Senior TikTok LIVE Partner
FOUNDED	December 2024 · Senior since May 2025
REGIONS	MENA (Gulf included) · France · Italy · Germany · USA · Canada
TECHNOLOGY	Black OS — proprietary management system
HEADQUARTERS	Tunis, Tunisia

This report series is published by Black Ads Agency as a contribution to the understanding of TikTok markets in the region. The figures presented are verifiable and drawn from public sources. The publication is not commercial in nature and may be cited freely with attribution to the source.

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