BLACK ADS AGENCY
Senior TikTok LIVE Partner · MENA · Europe · North America

MARKET INTELLIGENCE REPORT

VOLUME 07 — ITALY

Social Media · TikTok · TikTok LIVE

Official data · Verified sources · Market analysis

May 2026 edition · Published by Black Ads Agency

CONTENTS

ABOUT THIS EDITION

Volume 07 extends the Western cycle, after France (Vol. 06). It covers Italy; Germany (Vol. 08) and the USA (Vol. 09) follow. The first cycle covered MENA markets (Vol. 01-05). Each volume applies a funnel logic — digital macro → social media → TikTok → TikTok LIVE — and draws on primary sources (DataReportal/Kepios, ISTAT, IMF, OECD, AGCOM, GSMA Intelligence, Ookla). Italian specificity: the market combines Western Europe's most marked TikTok dip-then-rebound trajectory, one of Europe's oldest demographics, and a unique global creator anchor — Khaby Lame, the most-followed TikToker worldwide.

01 Executive summary

Italy is a mature TikTok market with a unique profile: 22.0M adult users at end-2025 (43.5% of adults) with a spectacular dip-then-rebound trajectory (20.92M → 19.8M → 22.0M, +11.1% from the trough). Demographics are the oldest of the cycle (median 48.2, 25.1% aged 65+), the TikTok audience is strongly female (59.7% F, up +8.1pp in 22 months) and the country hosts the world's most powerful creator anchor — **Khaby Lame, ~162M followers, the most-followed TikToker worldwide**. For Black Ads, the IT+ server covers peninsular and insular Italy, and the market is structuring as a bridge between Western Europe and the MENA diaspora (Moroccan, Tunisian, Egyptian).

59.1M TOTAL POPULATION *Median age 48.2*	**53.1M** ACTIVE INTERNET USERS *89.9% penetration*	**41.2M** SOCIAL IDENTITIES *69.7% of population*
22.0M TIKTOK 18+ *+6.9% YoY (rebound)*	**43.5%** TIKTOK ADULT REACH *Italy · late 2025*	**59.7%** FEMALE AUDIENCE *TikTok Italy*

MARKET READ IN 5 POINTS

01 **Western Europe's most marked TikTok dip-then-rebound.**
Italy is the only major Western market that declined in early 2025 (-5.4% YoY to 19.8M) then rebounded to a new high by late 2025 (+11.1% from the trough, to 22.0M). Post-DSA normalisation and the Khaby Lame effect put the market back on an upward trajectory.

02 **The cycle's oldest demographic.**
Median age 48.2 (vs France 42.3, USA 38.5, Algeria 28.6); 25.1% aged 65+; only 17.9% in the 18-34 core demographic. The structural audience ceiling is close — but the purchasing power of 45+ and 65+ opens an underexploited premium ARPGifter niche.

03 **Massively female audience and continued feminisation.**
59.7% F at end-2025 (vs 51.6% in early 2024, +8.1pp in 22 months) — the fastest female shift in the West. The creator mix leans toward beauty, fashion, lifestyle, family, food — not gaming/PK which remains a minority.

04 **Khaby Lame — the world's most powerful creator anchor.**
With ~162M followers globally, Khaby Lame (Senegalese-Italian, Italian citizen since 2022) is **the most-followed TikToker worldwide**. He operates from Italy and proves the country is a global virality launchpad. Bridge effect: valorises Black Ads' IT+ server and the MENA-diaspora dimension.

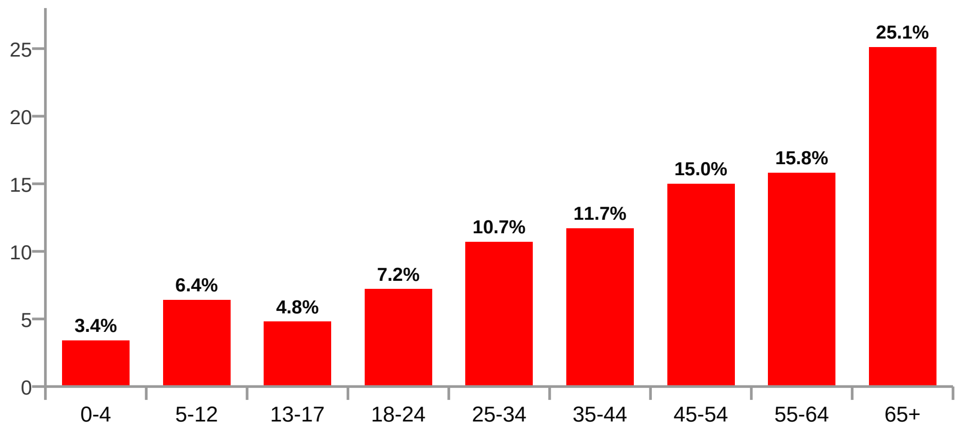
05 **CRP available + structuring MENA diaspora corridor.**
The Creator Rewards Program is eligible in Italy. The market hosts ~450k Moroccans, ~200k Tunisians, ~150k Egyptians — underexploited bilingual Italian-Darija/Derja-Arabic creator niche. The IT+ Black Ads server exploits this dual position: mature Western market + MENA bridge.

02 Country context

DEMOGRAPHICS & POPULATION PROFILE

Italy had **59.1 million inhabitants** at end-2025, with structurally negative demographic growth. The population is **72.7% urban**, concentrated in the Po Valley (Milan, Turin, Bologna, Venice), Rome and the Mediterranean coast. Median age reaches **48.2 — the highest of the Black Ads series** and one of the highest in the world. The 65+ cohort represents **25.1% of the population (~14.8M people)**; the 18-34 cohort is only 17.9% (~10.6M). This inverted pyramid is the structural determinant of TikTok's audience ceiling at 22M and of the underexploited 45+ premium ARPGifter niche.

Population distribution by age bracket (%)



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

ECONOMIC CONTEXT

Italy paradoxically combines record-low unemployment with weak growth. GDP 2025 is expected at **+0.4-0.5%** (ISTAT more optimistic at +1.8%), after +2.8% in 2024 — marked deceleration. Unemployment reaches a **historic low of 6.0% (July 2025)**, but youth unemployment 15-24 remains high at **18.7%** (~3× the general rate) and reflects the North/South economic divide (Mezzogiorno >30% in some provinces). Inflation has normalised to 1.9%. Nominal GDP 2025 reaches ~$2,544 billion — 8th-largest economy globally.

REGULATION & DIGITAL ENVIRONMENT

Italy applies the European framework **GDPR + Digital Services Act (DSA)** with **AGCOM** (Autorità per le Garanzie nelle Comunicazioni) as national Digital Services Coordinator. AGCOM has been particularly active on platform compliance: Ferragni Pandoro-gate 2023 enforcement, creator advertising disclosure guidelines, minor protection. Pre-publication discipline is stricter than in France. For TikTok LIVE agencies, the Italian framework demands rigorous operational compliance.

03 Digital infrastructure

Italian mobile infrastructure took a major leap in 2025 (+59.7% YoY on median speed) thanks to accelerated 5G rollout. Five operators (TIM, Vodafone Italia, WindTre, Iliad Italia, Fastweb) maintain strong competitive pressure on data pricing — favourable to LIVE streaming.

67.7M	98.6%	85 Mbps
MOBILE CONNECTIONS	MOBILE BROADBAND	MOBILE MEDIAN
114% of population	*3G / 4G / 5G*	*+59.7% in one year*

MOBILE CONNECTIVITY

GSMA Intelligence counts **67.7M active cellular connections** at end-2025 — 114% of population, standard multi-SIM. Mobile broadband (3G/4G/5G) reaches **98.6%**. Five operators structure the market: TIM (incumbent), Vodafone Italia, WindTre, Iliad Italia (low-cost disruptor since 2018) and Fastweb (fixed + MVNO). Iliad's entry compressed data prices, democratising intensive LIVE consumption.

INTERNET SPEEDS — MAJOR 5G LEAP

Ookla measures a median mobile download speed of **85.39 Mbps** (August 2025), up **+59.7%** YoY — one of the largest mobile jumps in OECD markets in 2025, reflecting accelerated 5G rollout. Fixed broadband progresses to **96.32 Mbps** (+22.5% YoY) — FTTH catching up. The gap vs France (308 Mbps) remains significant but is narrowing.

INTERNET USAGE

53.1M Italians used the internet in October 2025, i.e. 89.9% of the population. Penetration is at saturation and has even slightly declined (-0.3% YoY, -182k) — not from disconnection but from declining demographics. The 'volume' growth reserve is exhausted; arbitrages are on intensity of use.

Indicator	Italy	France	Germany	USA
Population (M)	59.1	66.7	83.9	348
Internet users (M)	53.1	63.4	78.5	324
Internet penetration	89.9%	95.2%	93.5%	93.1%
Social identities (M)	41.2	51.5	64.7	254
TikTok 18+ (M)	22.0	23.4	23.7	153
TikTok 18+ reach	43.5%	43.9%	33.9%	~58%
Mobile speed (Mbps)	85.39	130.64	70.54	154.48

Black Ads Western market comparison · Source: DataReportal Digital 2026, October 2025

04

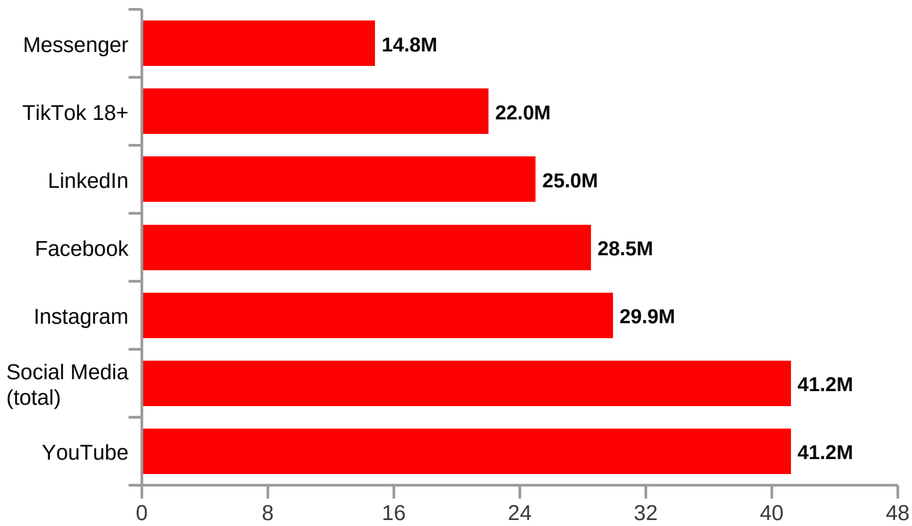
Social media landscape

The Italian social landscape is led by YouTube (41.2M = 100% of identities), followed by Instagram (29.9M, +4.2%) and an eroding Facebook (-2.6%). Italian specificity: LinkedIn growing strongly (+13.6% YoY, 25M), TikTok rebounding (+6.9%) and X collapsing at -29.9% — one of Europe's steepest declines.

VOLUME AND REACH BY PLATFORM (LATE 2025)

Kepios identifies **41.2M active social identities** in Italy in October 2025, i.e. **69.7% of the population**. Slight contraction (-2.4% YoY, -1M) reflecting demographic ageing.

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



Source: DataReportal Digital 2026 · Native ad-tool data — October 2025

PLATFORM-BY-PLATFORM READ

YOUTUBE · 41.2M

Largest platform. Slight decline (-2.4% YoY) tied to demographic ageing. Near-perfect M/F parity (49.9% F).

INSTAGRAM · 29.9M

+4.2% YoY (+1.20M). 51.5% female audience. Reference "beauty / fashion / lifestyle" platform — Chiara Ferragni legacy still structuring.

FACEBOOK · 28.5M

Structural decline (-2.6% YoY, -750k). Still relevant for community groups and 35+ informal commerce.

LINKEDIN · 25.0M

+13.6% YoY (+3.00M) — one of the strongest growths. Reflects Italian "corporate influencer" expansion and B2B market professionalisation.

TIKTOK 18+ · 22.0M

Rebound **+6.9% YoY (+1.41M)** after the 2024-2025 trough. 59.7% female audience (+8.1pp in 22 months). Adult reach 43.5%.

MESSENGER · 14.8M

Significant decline (-6.9% YoY, -1.10M). WhatsApp now largely dominates Italian messaging.

SNAPCHAT · 5.11M

Solid growth (+10.6% YoY) on a narrow base. 56.3% female audience. Young-adult urban platform.

X (TWITTER) · 5.04M

Collapse of -29.9% YoY (-2.15M) — one of Europe's steepest X declines. Audience heavily male (70.1% M). Marginal share, budget often reallocable.

ENGAGEMENT TRENDS

- TikTok dip-then-rebound trajectory: -5.4% in 2024-2025 then +11.1% from the trough. Post-DSA normalisation + Khaby Lame effect + female "lifestyle creator economy" wave.
- Accelerated TikTok feminisation: +8.1pp female share in 22 months — fastest in the West.
- Structuring North/South divide: Lombardy, Veneto and Emilia-Romagna carry gifter ARPU; Mezzogiorno (Sicily, Campania, Calabria, Apulia) supplies creator volume but at lower purchasing power.
- Significant MENA diaspora: ~450k Moroccans, ~200k Tunisians, ~150k Egyptians — natural bridge to Black Ads' MENA server for the IT+ server.

GENDER SPLIT — FEMALE LIKE FRANCE

Italy follows the same inversion as France: TikTok is **majority female (59.7% F)** vs male-led MENA. Italian specificity: the female share has accelerated since 2024 (51.6% → 59.7%, +8.1pp in 22 months) — the fastest shift in the West. This feminisation orients the creator mix and the B2B sponsorship portfolio.

05

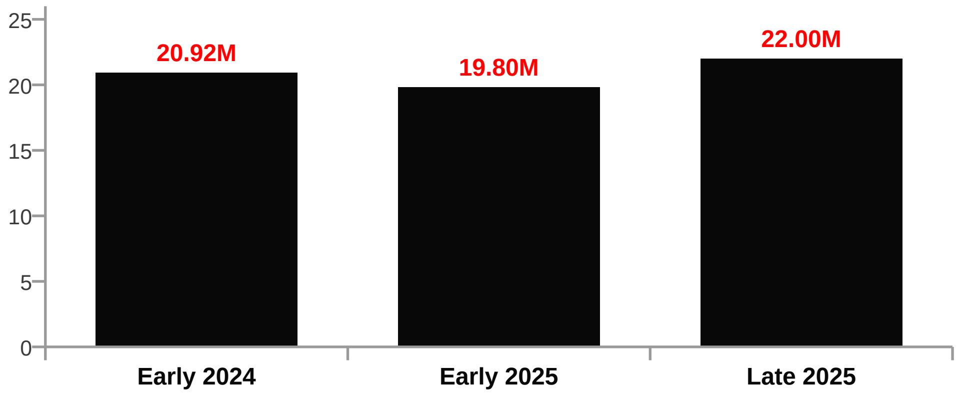
TikTok deep dive

TikTok Italy presents the most marked dip-then-rebound trajectory of the Black Ads Western cycle. Decline in 2024-2025 (20.92M → 19.8M), then spectacular rebound to 22.0M at end-2025 — +11.1% from the trough and a new historic high for the Italian market.

AUDIENCE — 22.0 MILLION ADULTS

TikTok's ad planning tools count **22.0M users aged 18+** in Italy at end-2025, i.e. **43.5% of adults**. 13-17 share (not published by TikTok but estimated at 2.5-3M) takes total reach to 24-25M, ~42% of the Italian population.

TikTok adult audience evolution in Italy

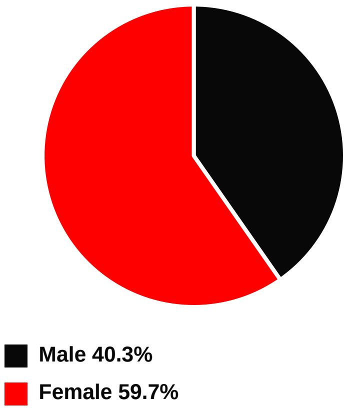


Sources: DataReportal Digital 2024, 2025 and 2026 — TikTok ad planning tools

READING THE CURVE — DIP-THEN-REBOUND

The Italian trajectory combines a **peak at 20.92M in early 2024**, a **decline to 19.8M in early 2025** (-5.4% YoY, -1.12M) followed by a **rebound to 22.0M at end-2025** (+11.1% from the trough, +2.2M). Three converging factors explain the rebound: (1) post-DSA normalisation after first 2024 enforcement, (2) Khaby Lame halo effect consolidating TikTok-Italy legitimacy, (3) the female "lifestyle creator" wave bringing back mainstream audience.

TIKTOK AUDIENCE PROFILE — ACCELERATING FEMALE



Markedly female and accelerating

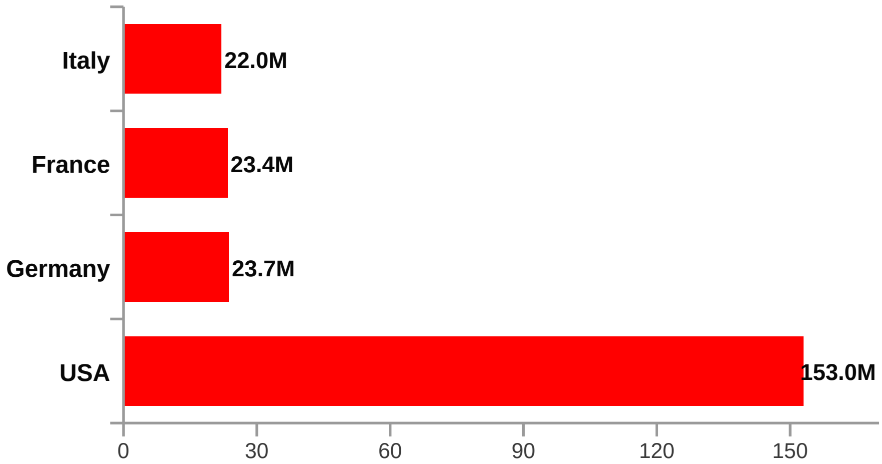
With 59.7% women and 40.3% men, TikTok Italy is one of the world's most feminised markets. Specificity: the female shift **accelerated over 22 months** (51.6% → 59.7%, +8.1pp). Strategic implications:

· Creator mix oriented toward beauty, fashion, lifestyle, family, food
· ARPGifter profile: lifestyle, fashion, food retail purchases
· Gaming/PK verticals minority in airtime mix
· Priority B2B advertisers: beauty (Kiko, Diego dalla Palma), fashion (Zalando IT, OVS), food retail (Esselunga, Conad)
· Premium 45+ and 65+ niche (25.1% of pop!) underexploited — highest ARPU potential in Western Europe

POSITIONING IN THE BLACK ADS WESTERN MIX

In the Western cycle, Italy ranks **4th by absolute volume** (22.0M) — behind USA (153M), Germany (23.7M), France (23.4M) — but 1st by global creator notoriety thanks to Khaby Lame:

TikTok 18+ audience — Western markets comparison (millions, late 2025)



Source: DataReportal Digital 2026 · TikTok ad planning tools

While numerically the smallest of the Black Ads Western markets, Italy has a unique structural asset: **Khaby Lame**. His global performance (~162M followers) legitimises the Italian creator ecosystem as a virality-to-world launchpad, and his Senegalese-Italian origin makes him a natural cultural bridge with Africa and the MENA diaspora — a key angle of the IT+ Black Ads positioning.

DOMINANT CONTENT CATEGORIES

Qualitative analysis of top Italian creators (Favikon, HypeAuditor, Heepsy) reflects feminisation and market maturity:

Category	Maturity	Creator volume	LIVE density
Lifestyle / fashion / beauty	Saturated	Very high	Strong
Humour / sketches	Mature	High	Very strong (Khaby legacy)
Food / Italian cuisine	Mature	Very high	Strong (LIVE chefs)
Family / parenting	Mature	High	Strong
Fashion / luxury	Mature	High	Strong (Milan fashion week)
Calcio (Serie A)	Mature	Medium	Strong (matches)
Diaspora IT-Maghreb	Growing	Medium	Strong
Gaming / e-sport	Growing	Medium	Strong (European PK)
Tourism / Italian lifestyle	Saturated	High	Strong
Senior / silver economy	Niche	Low	Premium ARPGifter niche
North/South regional	Niche	Medium	Medium

Qualitative read — May 2026

TOP ITALIAN CREATORS · SNAPSHOT

Italy's creator ecosystem is anchored by **Khaby Lame** (~162M followers globally, the most-followed TikToker worldwide, Italian citizen since 2022). Beyond Khaby, Favikon/HypeAuditor rankings highlight **Elisa Maino, Iris Ferrari, Marco Tornese, Sespo, Nick Pellegrino** — lifestyle, comedy, dance. The **Chiara Ferragni** legacy remains structural on Instagram (and redefined transparency norms after Pandoro-gate 2023). Calcio, Milan-fashion, regional cuisine and coastal-lifestyle verticals are mature.

LIVE competence remains concentrated — as in all Black Ads markets. In Italy, the advantage is twofold: (1) a global creator anchor legitimising professionalisation, (2) CRP offering an alternative monetisation path to LIVE gifts. This broadens the creator base but reduces conversion pressure toward professional LIVE.

06 TikTok LIVE & CRP

Italy is eligible for the Creator Rewards Program (CRP) — like France, Germany and the USA. The direct monetisation matrix combines CRP (view-based rewards) + LIVE gifts + B2B sponsorship + TikTok Shop perspective (launched in Italy in 2024).

LIVE GIFTS MECHANICS

Viewers buy "coins" which they convert into virtual gifts sent during LIVE. On the creator side, gifts are tallied in "diamonds", converted to cash. The creator can reach **up to 53% of post-TikTok gross** via 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

Operational reference rate: **USD 0.005 net to the creator per diamond**, before agency commission. In Italy, this gifts rate is complemented by CRP revenue (views), TikTok Shop commissions (2024 launch) and B2B sponsorship — quadruple lever.

GLOBAL ORDER OF MAGNITUDE

$3.5B
TIKTOK LIVE REVENUE 2024
Gifts + LIVE shopping

$1.12B
IAP Q4 2024
TikTok record quarter

60,000
US LIVE CREATORS
Part-time income

Per the Ipsos study commissioned by TikTok (June-July 2025), **more than 60,000 US-based LIVE creators** earned more than the median part-time income via gifts. For Italy, the equivalent pool is estimated at **7,000-10,000 active LIVE creators** with significant monetisation — conservative extrapolation given older demographics.

ITALY-SPECIFIC CONSTRAINTS

AGCOM — pre-publication discipline.

AGCOM applies stricter rules than France on pre-publication advertising disclosure. The Ferragni Pandoro-gate case (2023) established enforcement jurisprudence. Creators and agencies must ensure transparency on partnerships, "Pubblicità" mentions, minor protection.

Demographic ceiling — inverted pyramid.

With 25.1% of population 65+ and only 17.9% in 18-34 cohort, TikTok's audience ceiling is close. The challenge is no longer acquisition but intensity of use and premium 45+ capture — a structurally underexploited niche.

North/South divide — creator geography.

Mezzogiorno (Sicily, Campania, Calabria, Apulia) provides young creator volume but with 30%+ unemployment and lower purchasing power. The North (Lombardy, Veneto, Emilia-Romagna) carries gifter ARPU but with less creator volume. Geographic adaptation of the agency funnel required.

Smooth currency convertibility.

The euro is freely convertible; PayPal and SEPA operate without friction. The Italian creator question: tax optimisation (forfait regime at 15% for revenue <85k€, partita IVA, P.IVA / S.r.l. above) rather than currency repatriation.

THE DIASPORA FACTOR & KHABY LAME EFFECT

Italy hosts ~450k Moroccans (the largest non-EU community), ~200k Tunisians, ~150k Egyptians — natural bridge to Black Ads' MENA server. **Khaby Lame**, the most-followed Senegalese-Italian TikToker worldwide (~162M), is the archetype of this bridge dimension: Italy-Africa-Maghreb-world. For Black Ads IT+, the "bilingual Italian-Arabic/darija/derja" niche is underexploited and offers CRP+gifts+B2B sponsorship potential on two audiences (Italian + MENA diaspora).

THE STRUCTURING ROLE OF AGENCIES

Official TikTok LIVE agencies play a critical role in Italy on three axes: (1) AGCOM/DSA compliance, (2) tax optimisation (complex IT regimes), (3) access to TikTok programs (CRP, Shop, Spark Ads). The Black Ads IT+ server covers peninsular and insular Italy and functionally the MENA corridor via Khaby and the diaspora.

07 Outlook 2026 — 2027

Based on the observed TikTok rebound (+11.1% from the trough), mobile acceleration (+59.7% YoY) and post-DSA regulatory stabilisation, the following trajectories appear reasonable for Italy:

Indicator	Late 2025	End-2026 projection	End-2027 projection
TikTok 18+ audience	22.0 M	23.5 – 25.0 M	25.5 – 27.0 M
Reach 18+ (%)	43.5%	~48%	Plateau ~52%
Female audience (%)	59.7%	~62%	Plateau ~63-65%
Active LIVE creators (est.)	~8,000	11,000 – 14,000	17,000+
Median mobile speed	85 Mbps	130+ Mbps	200+ Mbps (5G+)
TikTok Shop Italy	Launched 2024	Mature 2026	Mainstream

Projections based on observed historical trends

EXPECTED TRANSFORMATION DRIVERS

TikTok Shop Italy scaling up.

TikTok Shop launched in Italy in 2024. 2026-2027 maturity will transform the creator monetisation matrix. CRP + gifts + Shop = quadruple lever unmatched in MENA markets.

Lasting Khaby Lame halo effect.

Khaby Lame's global position durably legitimises Italy as a creator launchpad — halo effect on new entrants, agencies and B2B advertisers.

Post-DSA stabilisation.

After two years of regulatory uncertainty, the DSA + AGCOM framework is stabilised. Creators and agencies plan on known bases.

Continued audience feminisation.

TikTok female share (59.7%) should continue growing toward ~62-65% by 2027 — mix orientation toward beauty/fashion/lifestyle/family/food.

Premium 45+ niche and silver economy.

With 25.1% pop 65+ and high senior purchasing power, the silver economy vertical (health, travel, services) is the underexploited strategic angle of the Italian market.

08 Sources & methodology

METHODOLOGY

This report aggregates data from primary official sources (DataReportal/Kepios, ISTAT, IMF, European Commission, AGCOM, GSMA Intelligence, Ookla) and from recognised secondary sources (Statista, Tubefilter, Favikon, HypeAuditor). Figures prefer the most recent versions — typically October 2025 for TikTok and Meta data.

METHODOLOGICAL LIMITATIONS

Several caveats:
- Platform ad reach figures are not equivalent to MAU.
- TikTok does not publish 13-17 figures.
- Social identities are not de-duplicated.
- The TikTok 2025 rebound combines ad-tool methodology effects and real audience expansion.
- Italian economic figures present an ISTAT vs European Commission methodological gap; cited ranges integrate both sources.

PRIMARY SOURCES

Organisation	Reference	URL
DataReportal / Kepios	Digital 2024, 2025, 2026 Italy	*datareportal.com/reports/digital-2026-italy*
DataReportal	Digital 2026 France / Germany / USA	*datareportal.com/reports*
ISTAT	Employment, unemployment, GDP, inflation Italy	*istat.it/en*
IMF	World Economic Outlook Italy	*imf.org/external/datamapper/profile/ITA*
European Commission	Economic forecast Italy	*economy-finance.ec.europa.eu*
AGCOM	Platform & influencer regulation Italy	*agcom.it*
GSMA Intelligence	Mobile connections Italy	*gsmaintelligence.com*
Ookla	Speedtest Global Index — Italy	*ookla.com*
Tubefilter / Ipsos	TikTok LIVE Virtual Gifting Study 2025	*tubefilter.com (Dec 2025)*
TikTok Creator Academy	Creator Rewards Program conditions	*tiktok.com/creator-academy*
Black Ads Agency	TikTok LIVE Income Calculator	*black-ads.agency/tools/live-income-calculator*
Favikon	Top Italian TikTokers 2026	*favikon.com/blog/top-italian-tiktokers*
HypeAuditor / Heepsy	Influence rankings Italy	*hypeauditor.com · heepsy.com*
TikTok Newsroom	TikTok Live Creator Networks	*tiktok.com/live/creator-networks*
ResourcEra	TikTok Revenue (2018-2027)	*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. 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.

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. The figures presented are verifiable and drawn from public sources.

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