

BEAUTY 2.0

# The European Beauty Expansion Playbook

Strategy, signals, and frameworks for European market entry

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# Why Europe. Why Now.

The European beauty market represents a €104 billion opportunity. But entering European markets successfully requires more than translation — it demands cultural intelligence, creator ecosystem mapping, and creative localisation built on real market data.

This playbook distils two decades of beauty industry experience into a practical framework for brands ready to expand across European markets. From France to the Nordics, each market has its own beauty culture, consumer expectations, and creative patterns.

Whether you are entering your first European market or scaling across multiple territories, this playbook provides the strategic foundation for sustainable growth.

## THE OPPORTUNITY

# €104bn European Beauty Market

**€16.9bn**

Germany

**€14.2bn**

France

**€13.4bn**

Italy

**€11.2bn**

Spain

Europe's beauty market is fragmented, culturally diverse, and growing. The brands that win are those that treat each market as unique — with its own consumer behaviour, creator ecosystem, retail landscape, and creative expectations.

## Beauty Behaves Differently Here

What works in the UK or US rarely translates directly to continental Europe. Each market has its own beauty culture, creator ecosystem, retail landscape, and consumer expectations.

A hero product in London might need completely different positioning in Paris, a different content format in Berlin, and a different creator archetype in Milan.

The brands that succeed in European expansion are those that invest in understanding these differences before they invest in scaling content and media.

**Key insight:** Creative duplication is the single biggest cause of failed European launches. What converts in London rarely converts in Berlin.

# Five Principles of European Expansion

- 1** Market Nuance — Every market is different. We research before we recommend.
- 2** Channel Alignment — Content strategy must match the retail and discovery channels.
- 3** Creator Ecosystems — The right creators in each market are more valuable than the biggest ones.
- 4** Creative Localisation — Localisation means more than translation. It means cultural adaptation.
- 5** Continuous Testing — We test, measure, and iterate. Expansion is a process, not a launch event.

## MARKET PROFILE



# France

€14.2bn

### CONSUMER BEHAVIOUR

French consumers prioritise ingredient efficacy and dermatological credibility. Pharmacy channel dominates skincare discovery.

### CREATIVE STYLE

Educational, ingredient-led content. Clinical demonstrations outperform lifestyle content. Minimalist aesthetic with scientific credibility.

### KEY CHANNELS

Pharmacy-led discovery, Instagram and TikTok for awareness, YouTube for long-form education. Sephora as premium retail gateway.

### CREATOR ECOSYSTEM

Beauty educators with dermatology credibility. Authority-led content outperforms lifestyle formats.

## MARKET PROFILE



# Germany

€16.9bn

### CONSUMER BEHAVIOUR

German consumers are research-driven and value transparency. Strong preference for clean beauty, sustainability, and clinical evidence.

### CREATIVE STYLE

Evidence-based, transparent content. Before/after demonstrations, ingredient breakdowns, and sustainability storytelling.

### KEY CHANNELS

dm and Rossmann as key retail channels. YouTube for research-phase content. Instagram for awareness. TikTok growing in Gen Z skincare.

### CREATOR ECOSYSTEM

Dermatology and science-backed voices. Clinical credibility drives conversion more than lifestyle aspiration.

## MARKET PROFILE



# Italy

€13.4bn

### CONSUMER BEHAVIOUR

Italian consumers blend beauty with lifestyle and fashion. Strong preference for luxury positioning and sensorial experience.

### CREATIVE STYLE

Lifestyle-rich, aspirational content. Routine storytelling and sensorial demonstrations. Mediterranean lifestyle integration.

### KEY CHANNELS

Instagram dominant. TikTok growing fast. Pharmacies and profumerie as key retail. Fashion-beauty crossover content performs well.

### CREATOR ECOSYSTEM

Lifestyle creators blending beauty, fashion, and Mediterranean living. Aspiration-led content drives engagement.

## MARKET PROFILE



# Spain

€11.2bn

### CONSUMER BEHAVIOUR

Spanish consumers are highly social in beauty discovery. Routine-focused and community-driven. Multi-step skincare routines resonate.

### CREATIVE STYLE

Routine-focused, community-oriented content. Step-by-step tutorials, morning/evening routines, and relatable creators.

### KEY CHANNELS

Instagram and TikTok dominant. Primor and Druni as key retailers. YouTube for tutorials. Community-driven discovery.

### CREATOR ECOSYSTEM

Routine creators with strong community engagement. Relatable, warm tone outperforms polished authority content.

## MARKET PROFILE



# Nordics

€8.5bn

### CONSUMER BEHAVIOUR

Nordic consumers prioritise sustainability, minimalism, and ingredient purity. Strong trust in independent reviews and credibility-led content.

### CREATIVE STYLE

Minimalist, credibility-led content. Ingredient transparency, sustainability storytelling, and honest reviews.

### KEY CHANNELS

Instagram and TikTok for awareness. Matas (DK), Kicks (SE/NO), Sokos (FI) as key retailers. Blog-format reviews still influential.

### CREATOR ECOSYSTEM

Credibility-led skincare creators focused on transparency. Sustainability credentials are non-negotiable.

## Creative Patterns by Market

Different markets respond to different creative formats. Understanding which patterns resonate is the foundation of effective European content strategy.

Ingredient Deep Dives — Scientific breakdowns with efficacy evidence. Strong in France and Germany.

Routine Storytelling — Morning and evening skincare routines. Strong in Spain and Italy.

Clinical Demonstrations — Before/after results with expert commentary. Strong in Germany and France.

Lifestyle Creative — Product-in-context lifestyle content. Strong in Italy and Spain.

Minimal Routines — Three-step routines emphasising simplicity. Strong in Nordics.

# European Creator Ecosystems

Each European market has a distinct creator ecosystem. The right creators in each market are more valuable than the biggest ones across all markets.



## France

Beauty educators with dermatology credibility



## Germany

Dermatology and science-backed voices



## Italy

Lifestyle creators blending beauty and fashion



## Spain

Routine creators with community engagement



## Nordics

Credibility-led skincare creators

# European Launch Timeline

**Weeks 1–2** Market analysis · Creator mapping · Competitive landscape review

**Weeks 3–4** Creative testing · Initial creator partnerships · Content format validation

**Weeks 5–8** Scale winning formats · Expand creator network · Retail alignment

**Months 3–6** Expand to new markets · Cross-market learnings · Performance optimisation

# Creative Signals We Track

We monitor the signals that predict market success and adjust strategy in real time.

UGC vs studio balance — The ratio of user-generated to professionally produced content.

Routine formats — How multi-step routines are structured and which format drives completion.

Ingredient storytelling — Which ingredients trend by market and how deep the education goes.

Offer sensitivity — How different markets respond to discounts, bundles, and promotions.

Creator credibility — What authority signals matter most in each market.

# Common Market Entry Mistakes

These are the mistakes we see most often when brands attempt European expansion without market-specific strategy.

## **Creative Duplication**

Reusing UK or US creative assets without cultural localisation. What converts in London rarely converts in Berlin.

## **Retail Misalignment**

Launching DTC-first in markets where pharmacy or drugstore discovery dominates the beauty category.

## **Creator Mis-selection**

Choosing creators by follower count rather than market-specific credibility and audience trust.

## **Pricing Mistakes**

Applying UK pricing logic to markets with different price sensitivity and competitive landscapes.

# Scaling Strategy

Sustainable European expansion follows a clear pattern: validate in one market, extract learnings, adapt for the next market, and scale what works.

## Phase 1: Validate

Enter one market with full research, creator mapping, and creative testing. Build the measurement framework that will guide expansion.

## Phase 2: Learn

Extract cross-market learnings. Identify which creative patterns, creator types, and channel strategies transfer and which need local adaptation.

## Phase 3: Adapt

Enter market two with validated frameworks adapted for local nuance. Accelerate timeline using cross-market intelligence.

## Phase 4: Scale

Expand to additional markets with proven playbook. Each market entry is faster and more efficient than the last.

# The Beauty 2.0 Methodology

Our approach combines beauty industry expertise with data-driven creative strategy.

1

## **Creative Testing**

We test creative formats against real market data before scaling. No assumptions, only evidence.

2

## **Creator Ecosystems**

We map and activate creator networks specific to each market, not generic influencer lists.

3

## **Retail Alignment**

We align content strategy with retail channel requirements in every target market.

4

## **Performance Signals**

We track the signals that predict market success and adjust strategy in real time.

# UK Brand → France Launch

A UK-based skincare brand engaged Beauty 2.0 to plan and execute their French market entry.

**12**

Creator partnerships

**4.2x**

ROAS in 60 days

**340%**

Social engagement uplift

## Approach

We mapped the French pharmacy-adjacent creator ecosystem, tested ingredient deep-dive formats against lifestyle content, and aligned the launch with Sephora seasonal programming.

The brand achieved profitability within 60 days of French market entry, with creator-generated content outperforming studio content by 3.1x on cost-per-acquisition.

# Your Paris Strategy Session

Join us in Paris for a focused strategy session. We will map the first creative and market tests for your European expansion.

## What to Bring

- Your product and brand positioning
- Priority markets for expansion
- Current content and creator strategy
- Retail partnership goals
- Timeline and budget expectations

## Book your Paris Strategy Session

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BEAUTY 2.0

# Ready to expand into Europe?

Let us map the first creative and market tests for your brand  
together.

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