EUROPE CREATOR ECONOMY MARKET

Industry Insights, Trends, Outlook, and Opportunity Analysis, 2025-2032

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EUROPE CREATOR ECONOMY MARKET

SECTION 1
EUROPE CREATOR ECONOMY MARKET

Market Overview

DEFINITION OF THE CREATOR ECONOMY

COHERENT MARKET INSIGHTS

By Platform

Platform	Definition
Social Media Platforms	Online networks that enable creators to build audiences through short-form or visual content and direct engagement. These platforms prioritize interaction, community building, and brand collaborations. **Examples:** Instagram, TikTok, X (Twitter), Facebook, LinkedIn, Pinterest.
Video Sharing Platforms	Platforms designed primarily for hosting, distributing, and monetizing long-form or short-form video content. Creators generate ad revenue, sponsorships, or memberships through video views and watch time. Examples: YouTube, Vimeo, Dailymotion.
Podcasting Platforms	Audio-first platforms that allow creators to publish, distribute, and monetize podcasts through advertising, subscriptions, or sponsorships. Examples: Spotify, Apple Podcasts, Acast, Deezer, Podbean.
Live Streaming Platforms	Real-time content broadcasting platforms enabling direct audience interaction through chat, tips, and virtual gifting. These platforms are widely used in gaming, entertainment, music, and education segments. Examples: Twitch, YouTube Live, TikTok Live, Kick, Facebook Live.
eCommerce Platforms	Digital storefronts or marketplaces that enable creators to sell physical or digital products directly to audiences, including merchandise, presets, or courses. Examples: Shopify, Etsy, WooCommerce, Gumroad, Teachable, Kajabi.
Others (Crowdfunding & Membership Platforms	Platforms supporting fan-funding, subscriptions, and community memberships as alternative income sources for creators. These include recurring support or one-time funding models. Examples: Patreon, Ko-fi, Buy Me a Coffee, Substack, Kickstarter, Indiegogo.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DEFINITION OF THE CREATOR ECONOMY

By Revenue Model

Revenue Model	Definition
Advertising	Income earned from **platform-run ad programs** or embedded advertising formats (e.g., pre-roll, mid-roll, display). Platforms like **YouTube, TikTok, Meta, and X** share ad revenue with creators based on views, engagement, or CPM. This represents a core, recurring income source for video-first creators.
Paid Subscriptions	Revenue generated when audiences **pay a recurring fee** for access to premium or exclusive content. This includes platform subscriptions (e.g., YouTube Memberships, Twitch Subs), **newsletter paywalls (Substack)**, and **community memberships (Patreon, Ko-fi)**.
Merchandise	Earnings from the sale of **branded physical or digital goods** directly to followers including apparel, accessories, digital templates, presets, NFTs, and collectibles. Often facilitated through **eCommerce integrations** such as Shopify, Etsy, or creator-branded stores.
Side Businesses	Income from **entrepreneurial ventures** or external business initiatives built on creator reputation such as launching product lines, agencies, publishing ventures, or investing in startups. Increasingly common among macro and mega creators in Europe.
Sponsorships and Partnerships	Brand-funded collaborations where creators are **paid to promote, review, or co-create content** featuring a product or service. Includes **one-off campaigns, long-term ambassadorships, and affiliate partnerships.** Major share of creator earnings in mature markets (UK, Germany, France).
Others (Tips / Donations / Training, etc.)	Additional income streams from **audience contributions (tips, virtual gifts, donations)** and **creator-led education or consulting services.** Examples include “Super Thanks” on YouTube, “TikTok Gifts,” and paid coaching sessions, workshops, or masterclasses.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DEFINITION OF THE CREATOR ECONOMY

COHERENT MARKET INSIGHTS

By Application

Lifestyle:
Encompasses creators who share personal routines, daily activities, productivity tips, or aspirational living content. This segment overlaps multiple niches such as family, relationships, and minimalism. Lifestyle creators drive engagement through relatability and audience connection.

Beauty & Fashion:
Covers creators producing content on skincare, makeup, styling, fashion trends, luxury brands, and grooming. A key revenue driver in Europe's influencer market, dominated by brand partnerships, affiliate sales, and sponsored tutorials.

Health & Wellness:
Includes creators focused on physical fitness, nutrition, mental health, mindfulness, and sustainable living. Often collaborate with fitness brands, supplement companies, and wellness platforms. Popular on YouTube, Instagram, and TikTok.

Travel & Adventure:
Creators specializing in destination reviews, cultural exploration, travel hacks, and outdoor activities. Revenue sources include tourism collaborations, sponsored trips, affiliate links for travel gear, and content licensing to tourism boards.

Others (Food & Culinary, Home Decor, etc.):
Encompasses creators producing content around cooking, recipes, food reviews, and home aesthetics. This includes culinary influencers, chefs, and interior stylists sharing tutorials or home improvement content.

Art & Design:
Covers creators in visual arts, illustration, photography, animation, and digital design. These creators monetize through commissions, NFT art sales, and partnerships with design and software companies

Music:
Musicians, producers, DJs, and vocal artists who distribute or promote their work digitally. Platforms like YouTube, SoundCloud, and TikTok serve as primary exposure and monetization channels. Collaborations with record labels or brands are common.

Sports:
Creators sharing sports commentary, training techniques, athlete insights, or event coverage. Monetization includes brand sponsorships, affiliate deals (gear/equipment), and sports media collaborations.

Gaming:
Encompasses streamers and content creators focused on video games, eSports, and gaming reviews. A leading digital entertainment category in Europe, supported by ad revenue, live donations, brand sponsorships, and merchandise.

Others (Education, Cosplay, Business, etc.):
A broad group of creators producing knowledge-based, creative, or niche professional content, including online educators, financial influencers, business coaches, cosplayers, and academic communicators. Rapidly expanding with AI tools and skill monetization platforms.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DEFINITION OF THE CREATOR ECONOMY

By End User

Amateur Creator

- Independent individuals who create and share content primarily as a hobby, side-income, or personal expression rather than a full-time profession. They usually have limited production resources, smaller audiences (typically Nano or Micro creators, ≤100K followers), and rely on ad revenue, gifts, or small brand deals. Most amateurs operate on a part-time or project basis while maintaining other occupations or studies.

Professional Creator

- Full-time content producers who treat creation as a primary career or business. They manage dedicated teams or agency partnerships for production, monetization, and brand relations. Typically fall within the Macro and Mega tiers (≥100K followers) and earn diversified revenue streams sponsorships, paid campaigns, product lines, and recurring subscriptions. Professional creators often operate as registered businesses or media brands with structured schedules and long-term collaborations.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DEFINITION OF THE CREATOR ECONOMY

By Content Type

Video Content (V)	Includes **short-form and long-form video formats** created for platforms such as YouTube, TikTok, Instagram Reels, and Twitch. This segment represents the **largest share of creator output and revenue**, covering vlogs, tutorials, reviews, entertainment clips, and live sessions. Monetization mainly comes from ads, sponsorships, and platform payouts.
Audio Content (A)	Covers **podcasts, audio blogs, and music content** distributed through platforms like Spotify, Apple Podcasts, Deezer, and SoundCloud. Creators monetize via advertising slots, listener subscriptions, sponsorships, or live events. Growing adoption in Europe due to increased podcast listenership and streaming integration.
Written Content (W)	Encompasses **blogs, newsletters, and written commentary** shared through Substack, Medium, LinkedIn, and personal websites. Revenue sources include subscriptions, affiliate marketing, sponsorships, and digital product sales. Often linked to thought leadership, journalism, and professional education niches.
Others (Visual Art and Design, etc.) (O)	Includes **non-video visual formats** such as photography, illustration, graphic design, animation, NFTs, and digital artwork. Platforms like Behance, DeviantArt, and Instagram serve as main outlets. Monetization occurs through commissions, digital print sales, collaborations, and licensing.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DEFINITION OF THE CREATOR ECONOMY

By Creator Economy Entities

Entity	Definition
Content Creators	Individuals or teams that produce and distribute digital content across platforms to build audiences and monetize through ads, sponsorships, subscriptions, or product sales. This group includes influencers, streamers, vloggers, podcasters, writers, artists, and educators. Creators form the core value-driving segment of the ecosystem.
Platforms & Social Media	Digital environments that host, distribute, and monetize creator content. They provide discovery algorithms, ad revenue sharing, live streaming, and subscription tools. Examples include YouTube, TikTok, Instagram, Twitch, X, Patreon, and Substack. Platforms act as intermediaries between creators, brands, and audiences.
Tools & SaaS Providers	Companies offering software, analytics, and automation tools that enable creators to manage workflows, audiences, and income. This includes influencer relationship management (IRM), content scheduling, analytics dashboards, AI editing tools, financial/payment systems, and IP protection platforms. Examples: Linktree, LTK, Later, Notion, FameBit, Kajabi, Canva, Epidemic Sound.
Agencies & Creator Services	Specialized organizations that support creators and brands in campaign strategy, talent management, content production, and monetization. Includes influencer marketing agencies, talent representation firms, MCNs, production studios, and consultancy services that bridge creators with advertisers or platforms. Examples: WeAreSocial, Takumi, Studio71, Jellysmack, Pulse Advertising.

WHAT IS INCLUDED AND EXCLUDED?

What is included?

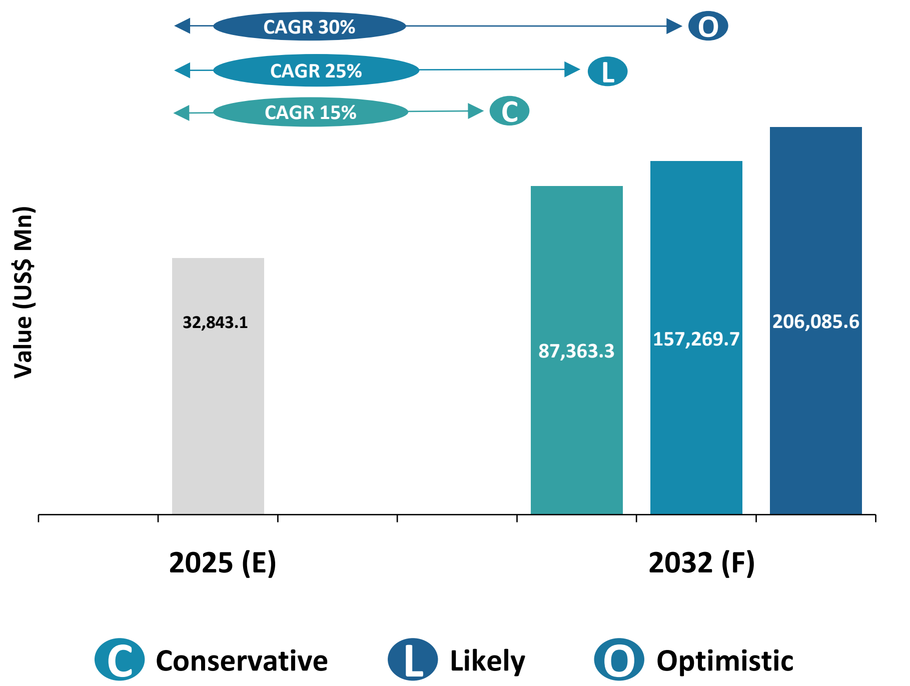
- The Europe Creator Economy Market includes all digital content creators across Europe who monetize their audience through advertising, sponsorships, subscriptions, memberships, tipping, affiliate programs, and creator-led e-commerce.
- The scope includes all major platforms and social media ecosystems—such as YouTube, TikTok, Instagram, Twitch, Patreon, Substack, and OnlyFans—that enable creators to distribute content and generate revenue.
- It incorporates creator tools, SaaS solutions, and technology providers that support monetization, analytics, content production, audience management, scheduling, community engagement, and social commerce enablement.
- The market includes agencies and creator service providers, such as influencer marketing agencies, talent management firms, creative studios, and monetization advisory companies that support creator-brand collaborations and revenue optimization.
- It further covers all creator-driven social commerce, platform payouts, brand partnerships, and revenue streams attributable to creator influence and digital audience engagement.
- Historical and forecast market values for key European countries—including Germany, the U.K., France, Italy, Spain, Belgium, and the Rest of Europe—are included as part of the market's regional segmentation.

What is excluded?

- The market excludes traditional creative industries such as museums, cultural arts, and offline creative manufacturing that do not involve digital audience monetization.
- It does not include corporate or business-to-business content production where revenue is not tied to direct creator audience monetization models.
- Offline-only creators or individuals who do not monetize their digital content are excluded unless analyzed separately as part of the broader creator population base.
- General digital advertising spending that is not directly attributable to creator performance falls outside the scope of this market.
- Revenue generated by media companies is excluded unless it flows through verified creator monetization channels.
- Markets outside Europe are not included in the sizing or analysis for this specific regional assessment.

Europe Creator Economy Market is expected to register a CAGR of 25.1% during the forecast period (2025-2032)

Figure Europe Creator Economy Market Value (US$ Mn)- Scenario Forecast 2025-2032.



OPTIMISTIC SCENARIO

The optimistic scenario assumes stronger CPM uplift, higher e-commerce conversion, and expanded monetization access, accelerating creator revenues and brand spending, driving Europe's creator-economy CAGR to 30% and significantly boosting market size by 2032.

LIKELY SCENARIO

The Likely scenario reflects Europe's expected creator-economy trajectory with stable CPM trends, growing brand investment, rising monetization rates, and consistent platform payouts, supporting a sustained 25.1% CAGR through 2032 across all major markets.

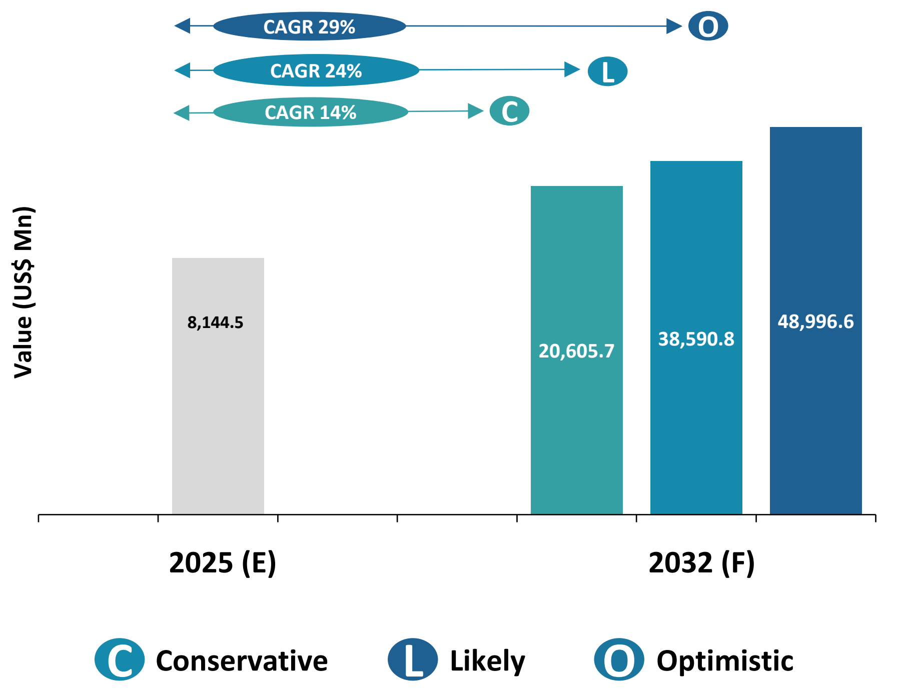
CONSERVATIVE SCENARIO

The Conservative scenario models slower European market growth due to lower CPMs, weaker conversion rates, and reduced monetization eligibility, limiting ecosystem expansion and resulting in a moderated 15% CAGR by 2032.

FRANCE CREATOR ECONOMY MARKET

France Creator Economy Market is expected to register a CAGR of 24.9% during the forecast period (2025-2032)

Figure France Creator Economy Market Value (US$ Mn)- Scenario Forecast 2025-2032.



OPTIMISTIC SCENARIO

The optimistic scenario assumes stronger CPM gains, higher conversion rates, and broader monetization access, accelerating creator revenues and platform payouts, resulting in a 29% CAGR and a substantially larger French market by 2032.

LIKELY SCENARIO

The Likely scenario reflects the expected growth trajectory of France's creator economy, driven by stable CPM trends, steady monetization adoption, expanding brand budgets, and consistent platform payouts, resulting in a sustained 24.9% CAGR through 2032.

CONSERVATIVE SCENARIO

The Conservative scenario models slower creator-economy expansion due to reduced CPMs, weaker e-commerce conversion, and lower monetization eligibility, producing only a 14% CAGR and a significantly smaller market outlook by 2032.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

MARKET POTENTIAL ANALYSIS (1/3)

TAM, SAM, and SOM Analysis

TAM
US$ 62,763.4
Million

SAM
US$ 32,843.1
Million

SOM
US$ 853.9
Million

TAM – US$ 62,763.4 Mn (Europe, 2025)

❖ **Considerations for TAM**

- Represents the **entire Europe Creator Economy** across all revenue streams, creator types, platforms, and content categories.
- Includes **both monetizing and non-monetizing creator activity**, adjacent ecosystem value, agencies, tools, platform revenues, and creator commerce.
- Covers **all European countries** (Western, Central, Eastern Europe, Nordics, UK, non-EU Europe).
- Reflects the **full economic output** generated by creators and creator-supporting entities.
- No exclusions **100% of the creator economy universe** in Europe for 2025.

COHERENT MARKET INSIGHTS

TAM, SAM, and SOM Analysis

TAM
US$ 62,763.4 Million

SAM
US$ 32,843.1 Million

SOM
US$ 853.9 Million

SAM – US$ 32,843.1 Mn (Europe, 2025)

❖ **Considerations for SAM**

- Represents the **portion of the creator economy that is commercially targetable** by the creators and enterprises.
- Includes **all monetizing creators**, platforms, SaaS tools, agencies, and digital revenue streams.
- Excludes **non-monetizing creators, informal creator activity, and non-commercial segments**.
- Focuses on **digital-first creator monetization**, aligned with your segmentation (platform type, revenue model, content type, application, end user).
- Covers **high-value geographies** and commercially relevant creator segments.
- Reflects the **realistic, commercially serviceable market** within Europe, not the entire creator universe.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

MARKET POTENTIAL ANALYSIS (3/3)

TAM, SAM, and SOM Analysis

TAM
US$ 62,763.4
Million

SAM
US$ 32,843.1
Million

SOM
US$ 853.9
Million

SOM – US$ 853.9 Mn

❖ **Considerations for SOM**

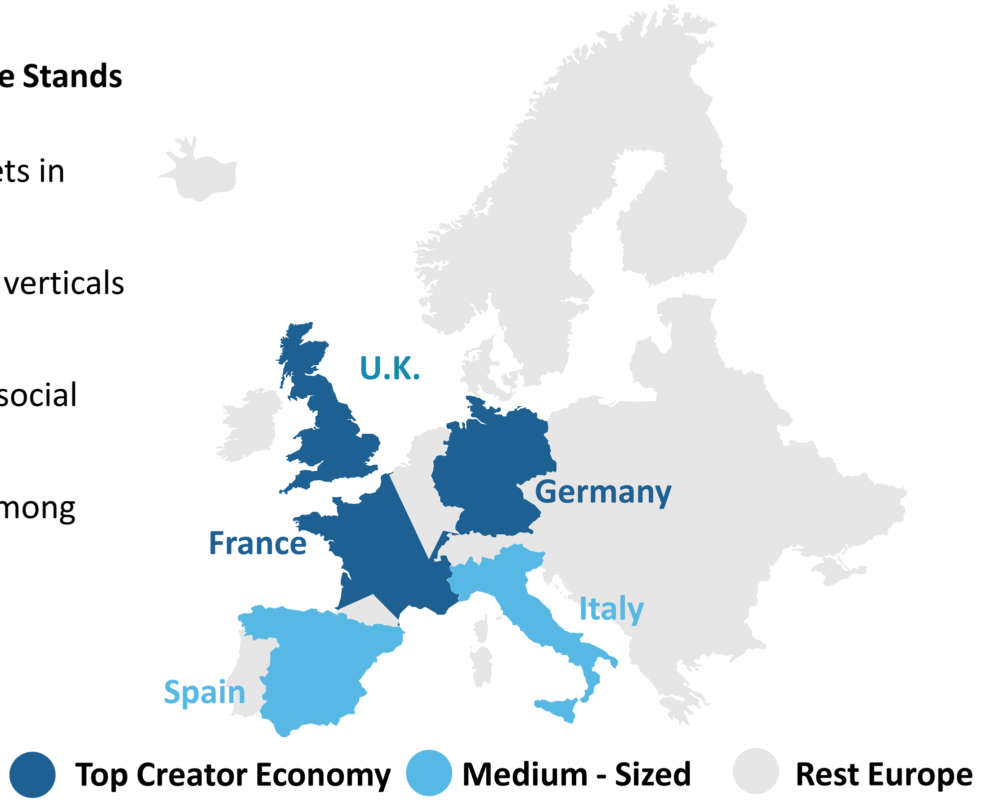
- Represents the **realistic near- to mid-term market share** a new or scaling player can capture.
- Accounts for **competitive intensity**, multi-country barriers, and creator acquisition challenges in Europe.
- Reflects **achievable capture** considering company's capabilities, GTM strategy, and operational constraints.
- Ensures **conservative yet credible** revenue expectations without over-projecting market dominance.
- Aligns with benchmark penetration rates (1–5%) for SaaS, creator-tools, platforms, and creator services in Europe.

POSITIONING OF FRANCE WITHIN THE EUROPEAN ECOSYSTEM: DRIVING ROLE, CULTURAL AND ECONOMIC SPECIFICITIES (1/3)

COHERENT MARKET INSIGHTS

Europe Creator Economy Landscape (2025): Where France Stands

- France ranks among the top 3 creator economy markets in Europe, alongside the UK and Germany.
- Strong presence in beauty, fashion, lifestyle, and food verticals makes France a high-engagement creator hub.
- France is one of Europe's fastest-growing markets for social commerce and creator-led e-commerce.
- High penetration of Instagram, TikTok, and YouTube among Gen Z and Millennials.
- France's regulated environment creates a trusted and transparent creator ecosystem, boosting adoption.



POSITIONING OF FRANCE WITHIN THE EUROPEAN ECOSYSTEM: DRIVING ROLE, CULTURAL AND ECONOMIC SPECIFICITIES (2/3)

COHERENT MARKET INSIGHTS

Cultural Traits That Differentiate the French Creator Ecosystem

- **Authenticity-Driven Market**

French audiences prefer creators who feel genuine, unfiltered, and relatable. Authenticity is a core value in French digital culture.

- **Lifestyle-Centric Culture**

Beauty, fashion, food, and “savoir-vivre” (art of living) are central to French consumption patterns and content themes.

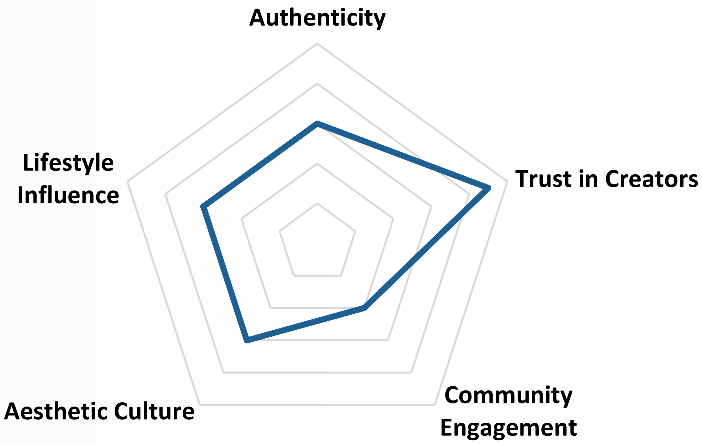
- **High Trust Levels**

Consumers in France trust creators more than traditional advertisers significantly reinforced by France’s strict influencer transparency laws.

- **Community & Loyalty**

French audiences show strong long-term loyalty to creators, especially in beauty, skincare, fashion, and niche food communities.

(Radar chart elements: Authenticity, Trust in Creators, Community Engagement, Aesthetic Culture, Lifestyle Influence)



POSITIONING OF FRANCE WITHIN THE EUROPEAN ECOSYSTEM: DRIVING ROLE, CULTURAL AND ECONOMIC SPECIFICITIES (3/3)

Economic Strengths Shaping France's Creator Economy

Strong Consumer Spending in Key Vertical Categories
France contributes a large share of European creator economy GDP due to high demand in lifestyle categories (beauty, skincare, fashion, food).

High Adoption of Creator Tools & Monetization Models
Creators in France heavily use paid tools, analytics platforms, and affiliate systems driving ecosystem monetization.

Brand Deals & Creator-Led Brands Growing Rapidly
France has a booming ecosystem of creator-launched brands in:

- beauty
- skincare
- fashion

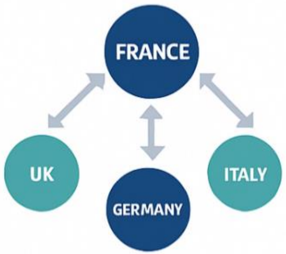
niche food products

Live Shopping & Social Commerce Scaling Fast
France is one of Europe's fastest-growing markets for livestream shopping and creator-led product sales.

Strong Digital Infrastructure
High smartphone and broadband penetration supports:
creator content consumption
e-commerce
live video
social retail

France as a Key Driver in the European Creator Economy

- **France as a Trendsetter**
France sets regional trends in beauty, fashion, food, luxury, and lifestyle driving cross-border consumer influence.
- **Cross-Border Influence of French Creators**
French creators impact markets in:
Germany
Italy
UK
Spain
especially in fashion, luxury, skincare, and culinary content.
- **Regulatory Leadership**
France's "Influence Responsible Law" is shaping European standards for ethical influencer marketing and transparency.
- **Large & Growing Social Commerce Market**
France ranks among Europe's largest markets for:
creator-driven social commerce
live shopping
influencer-led brand drops
- **High Creator Loyalty Among Consumers**
French audiences actively follow creators for long periods, strengthening the effectiveness of long-term brand collaborations.



FRANCE CREATOR ECONOMY – KEY EVOLUTIONS (2024 VS 2025)

Evolution Theme	2024	2025
Institutional Recognition of Creators	Creators viewed primarily as influencers or digital marketers with unclear fiscal and legal frameworks.	Recognized as *independent creative professionals* contributing to the digital economy; inclusion in national creative policy.
Rise of Creator Agencies & Collectives	Predominantly individual creators or small informal teams.	Emergence of *creator studios*, collectives, and agency-managed networks (e.g., Bump, Follow Agency).
Integration of AI in Creation	AI tools used mainly for *editing, captioning,* or *brainstorming.*	AI acts as a *co-creator* scripting, visual generation, dubbing, and multilingual content production.
Creator-Led Product & Brand Launches	Creators depended heavily on sponsorships and partnerships.	Creators launch *owned brands* and *equity-based collaborations* (e.g., Léna Situations' Hôtel Mahfouf).
Education & Training Ecosystem	Limited academic recognition influencer marketing seen as a niche marketing subject.	Business schools and media universities launch *creator economy modules, incubators,* and *certifications.*
Decentralized Monetization Platforms	YouTube, Instagram, and TikTok dominated creator revenues.	Growth in *subscription and fan-supported models* via uTip, Tipeee, Patreon, and Substack.
Engagement-Based Campaigns	Brands sought high-reach creators for short-term visibility.	Brands prioritize *authentic engagement and trust metrics*; micro- and nano-creators favored.
Cross-European Collaborations	Limited to national or Francophone regional partnerships.	*Pan-European content houses* and bilingual campaigns (e.g., France–Spain creator exchanges).
Transparency & Regulation	Voluntary compliance with advertising and ethical norms.	*Mandatory disclosure* under ARPP/ARCOM guidelines with performance-based KPIs.
Creator-to-Industry Talent Pipeline	Creators occasionally partnered with brands or media outlets.	Brands and media actively *recruit creators* as storytellers, designers, and ambassadors.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE ACCELERATORS

Accelerators	2024 Snapshot (France)	2025 Projection / Early Signs
Short-form video dominance	Still rapidly growing; video content is the leading format.	Continues accelerating; more professional production and platform tools optimized for short-form.
Revenue-model diversification	Monetization still skewed toward ad/sponsorship; emerging new streams.	Stronger diversification: subscriptions, creator-commerce, niche community monetization.
Professionalization of creators	Many creators part-time; growing investment in tools & quality.	More full-time creators; wider use of AI, analytics, creator-service platforms.
Micro-/nano-creator & niche community growth	Micro-creators increasingly important; niche communities growing.	Micro- and nano-influencers become central; brands lean into niche + high-engagement smaller creator models.
AI & tech tools in creation	Early adoption of AI and advanced editing tools referenced.	AI becomes mainstream in editing/content workflows; tools for creators become standard.
Regulatory & ethical focus	Emerging regulation around influencers, disclosure and transparency.	Tighter compliance across brand/creator partnerships; ethics and values become key selection criteria for brands.
Creator-brand equity & startup partnerships	Some movement toward creators launching products/brands.	Equity-based models and creator-entrepreneurs become more common creators act as co-owners or partners in brands.
Live events / experiential creator activations	Physical creator-fan experiences gaining ground.	Hybrid/live + virtual events scale; brands integrate creators into real-world activations more systematically.

EUROPEAN COUNTRY ACCELERATORS (1/2)

Germany Accelerators

- E-commerce + Shoppable Content:
- Strict Ad Disclosure & Compliance
- Long-form Educational Creators (Edutainment)
- Podcast Monetization & Branded Audio
- Regional & Language Niches
- Creator Studios & Production Houses
- Sustainability & Purpose-Driven Storytelling
- Live Commerce Pilots

Italy Accelerators

- Creator-Politics & Populist Micro-influencers
- Fashion & Luxury Creator Partnerships
- Food & Regional Lifestyle Creators
- Event-Led Monetization (Festivals & Awards)
- Micro-influencer Local Commerce
- Creator-Built D2C & Artisanal Lines
- Short-form Storytelling with Regional Flavours
- Monetization via Experiences & Hospitality

Spain Accelerators

- Music & Creator-Led Music Discovery
- Language & Regional Market Plays (Catalan, Basque)
- Travel & Local Experiences Content
- Short-form Comedy & Cultural Niches
- Podcasting & Conversational Formats
- Creator Collectives & Agencies
- Social Commerce Pilots
- Hybrid Live Events (Festivals + Streaming)
- Cause-Driven Creators & Social Impact

EUROPEAN COUNTRY ACCELERATORS (2/2)

COHERENT MARKET INSIGHTS

United Kingdom Accelerators

- Creator-Entrepreneurship & Startup Founders as Creators
- "Britishcore" Cultural Exports
- Subscription & Membership Monetization
- Fintech & Crypto Creator Ecosystem
- Regulation & Platform Accountability Pressure
- Branded Entertainment & Format Licensing
- Agency Consolidation & Creator Networks
- Sustainability & Ethical Creator Partnerships
- Niche Professional Content (Legal, Medical, EduTech)
- Experiential Creator Commerce

Belgium Accelerators

- Multilingual Creator Strategy
- B2B & LinkedIn Thought Leaders
- EU Institutions & Policy Communication Creators
- Micro-influencers in Food & Craft
- Employee Advocacy Uptake
- Local Festivals & Niche Events
- Sustainability Storytelling for SMEs
- Creator-Driven Public Service Campaigns

Rest of Europe Accelerators

- Nordics: Subscription-First Creator Economies
- Central & Eastern Europe (CEE): Gaming & Streaming Powerhouse
- Portugal & Greece: Tourism + Micro-Creator Campaigns
- Balkans: Viral Short-Form Storytellers
- Switzerland & Austria: High-Value Niche Experts
- Pan-European Creator Collectives
- Localization & Translation Services Boom
- Regulatory Fragmentation & Compliance Services
- Outsourced Creator Production (Near-shoring)
- Cross-Border Affiliate & E-commerce Networks

FRANCE CREATOR ECONOMY – EMERGING CHALLENGES COMPARISON (2024 VS 2025)

Challenge Theme	2024	2025
Regulatory Uncertainty & Oversight	Initial enforcement of the *Influencer Ethics Charter (2023–24)*; creators uncertain about compliance requirements and penalties.	Stricter enforcement by *ARCOM* and *DGCCRF*; creators face audits, tax clarity issues, and compliance fatigue.
Monetization Concentration	Heavy reliance on *brand partnerships* and *platform ad revenues*.	Over-saturation in brand-influencer deals → falling CPMs and engagement fatigue. Rise in *revenue instability*.
Platform Dependency Risk	TikTok, YouTube, and Instagram dominate creator incomes; algorithm changes affect reach unpredictably.	Growing awareness and shift to *multi-platform presence* and *community-first monetization* (e.g., Discord, newsletters).
Key Person Dependency (Creator-Centric Risk)	Many media startups built around single personalities (e.g., *HugoDécrypte*).	Active efforts to *depersonalize brands* via team-building, IP, and co-host models.
Economic Pressures & Brand Budgets	Economic slowdown and inflation cause reduced ad spending from French corporates.	Ad budgets stabilize but brands demand *ROI-based collaborations* shifting risk to creators (performance contracts).
AI Integration & Ethical Risks	Creators start using AI for text, editing, and idea generation low awareness of copyright or bias implications.	Widespread AI adoption brings *deepfake risks*, *IP disputes*, and *audience authenticity concerns*.

DATA ON TWO SENSITIVITY PAGES SHOWING -20% / +20% VARIATIONS FOR CPM, E-COMMERCE CONVERSION, % OF MONETIZED CREATORS.

COHERENT MARKET INSIGHTS

SENSITIVITY PAGE 1 — EUROPE CREATOR ECONOMY (2025–2032)

Year	Base	–20% Variation	+20% Variation
2025	32,843.10	26,274.50	39,411.70
2026	39,722.00	31,777.60	47,666.40
2027	48,630.30	38,904.20	58,356.30
2028	60,363.60	48,290.90	72,436.30
2029	75,849.90	60,679.90	91,019.90
2030	96,190.20	76,952.20	115,428.20
2031	122,743.50	98,194.80	147,292.20
2032	157,269.70	125,815.80	188,723.60

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

DATA ON TWO SENSITIVITY PAGES SHOWING -20% / +20% VARIATIONS FOR CPM, E-COMMERCE CONVERSION, % OF MONETIZED CREATORS.

SENSITIVITY PAGE 2 — FRANCE CREATOR ECONOMY (2025–2032)

Year	Base	–20% Variation	+20% Variation
2025	8,144.50	6,515.60	9,773.40
2026	9,841.10	7,872.90	11,809.30
2027	12,034.60	9,627.70	14,441.50
2028	14,919.30	11,935.40	17,903.20
2029	18,720.40	14,976.30	22,464.40
2030	23,703.80	18,963.00	28,444.60
2031	30,196.30	24,157.00	36,235.60
2032	38,590.80	30,872.60	46,309.00

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

SECTION 2
EUROPE CREATOR ECONOMY MARKET

Executive Summary

FRANCE CREATOR ECONOMY MARKET SIZE (2025) VS 2024

FRANCE CREATOR ECONOMY MARKET SIZE, 2024 (US$ Mn)

6,832.1

VS

FRANCE CREATOR ECONOMY MARKET SIZE, 2025 (US$ Mn)

8,144.5

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPEAN BENCHMARK: FRANCE VS KEY COUNTRIES (SPAIN, UK, GERMANY, ITALY, BELGIUM), 2025

COHERENT MARKET INSIGHTS

Market Size
France (US$ Mn)
8,144.5

Germany (US$ 9,969.9 Mn)

U.K. (US$ 9,832.6 Mn)

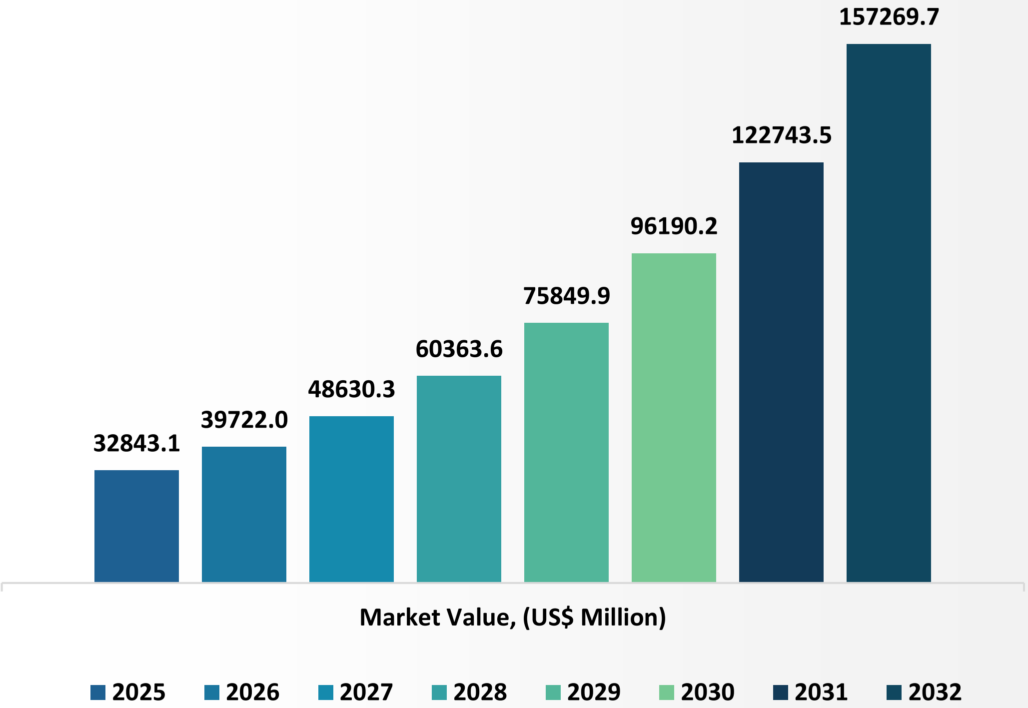
Italy (US$ 1,785.8 Mn)

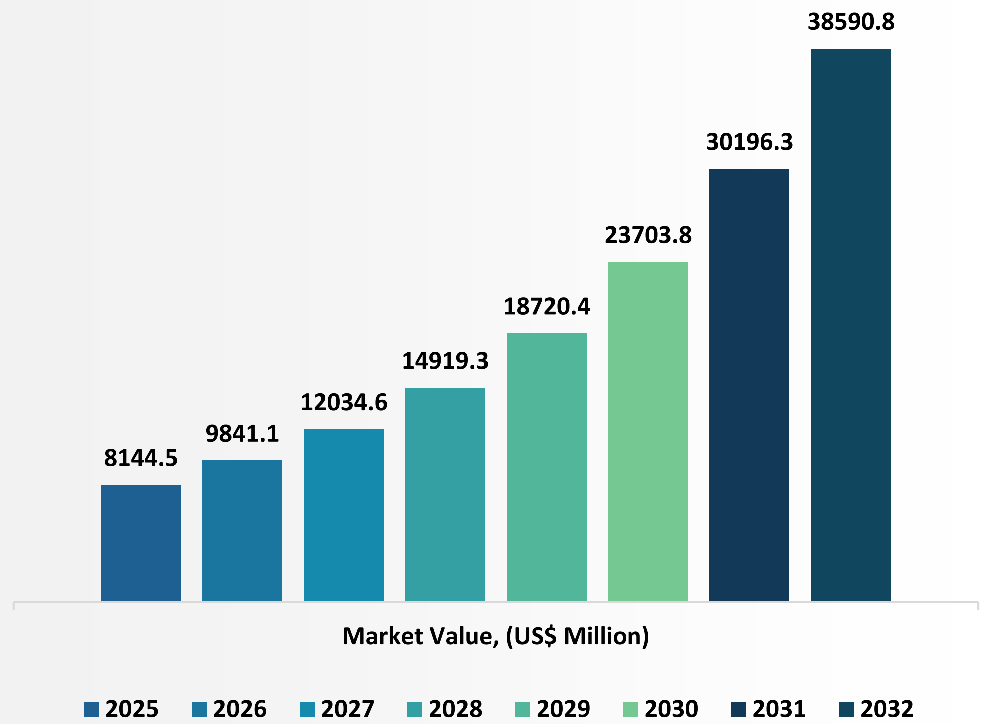
Spain (US$ 1,272.6 Mn)

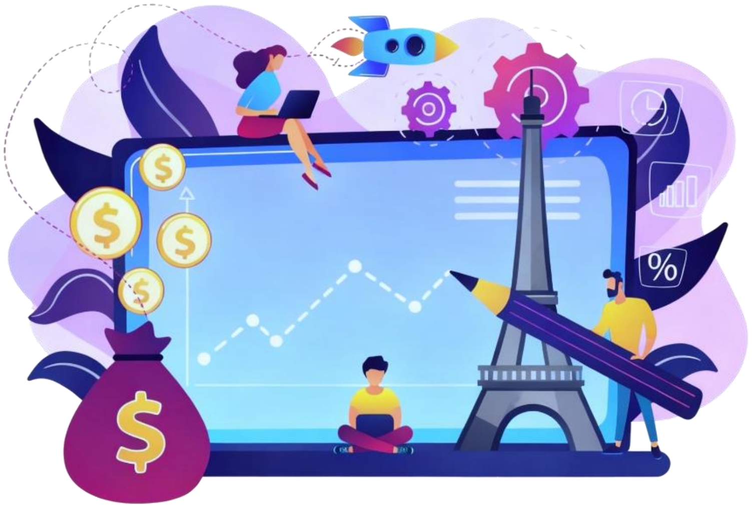
Belgium (US$ 403.7 Mn)

Rest of Europe (US$ 1,433.9 Mn)

FUTURE PROJECTIONS OF CREATOR ECONOMY MARKET IN EUROPE, 2025 – 2032 (US$ MN)



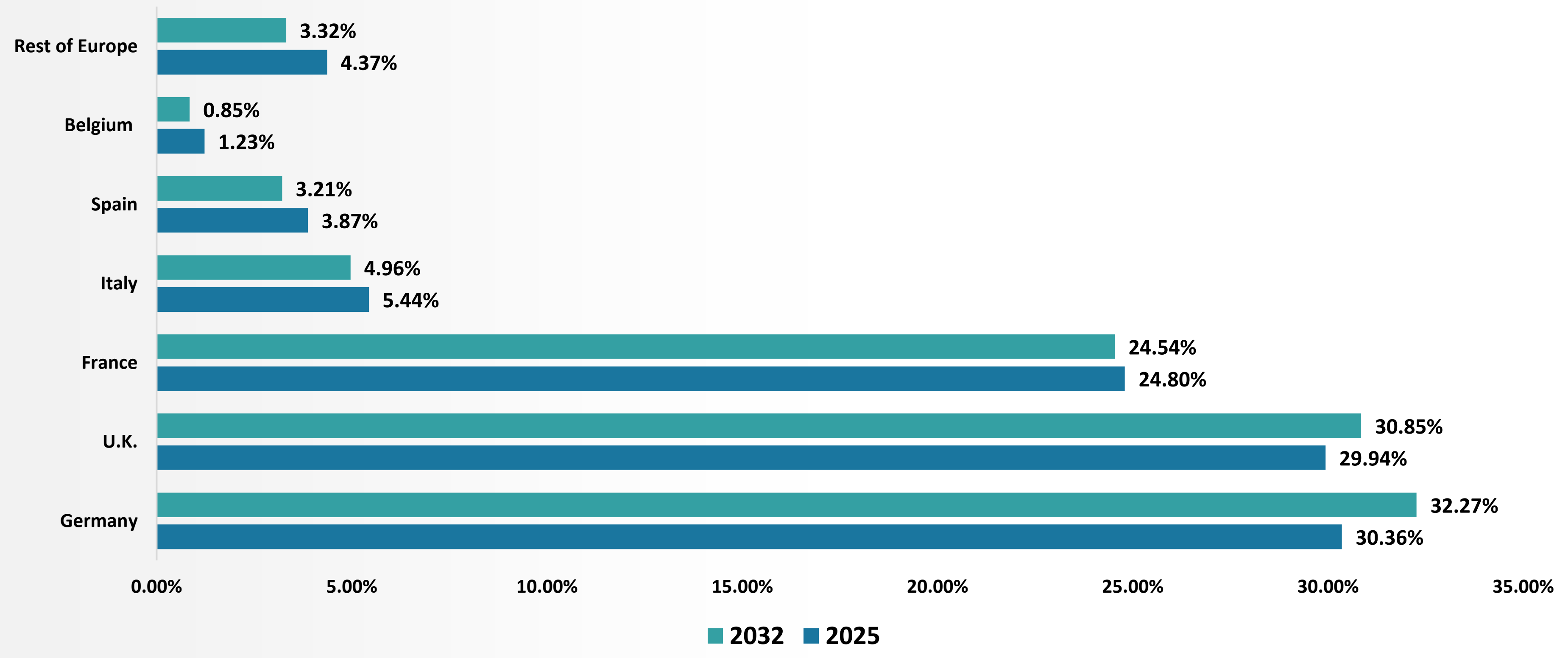




FUTURE PROJECTIONS OF CREATOR ECONOMY MARKET IN FRANCE, 2025 – 2032 (US$ MN)

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

MARKET SHARE BY COUNTRY, 2025 AND 2032



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

JOBS CREATED (DIRECT AND INDIRECT) IN FRANCE AND CONTRIBUTION TO THE TOTAL WORKFORCE (VS EUROPE)

Direct Jobs

- These include content creators like YouTubers, Twitch streamers, TikTok influencers, podcasters, and writers, along with roles in graphic design, video editing, and marketing. Many of these jobs are concentrated in metropolitan areas, with Paris serving as a central hub for digital activity in France.
- **Content Creators:** Individuals who produce videos, podcasts, blogs, or other forms of media. This group includes influencers on platforms like YouTube, Instagram, TikTok, and Twitch.
- **Freelancers:** Professionals such as graphic designers, video editors, and writers who provide services directly to creators or brands.

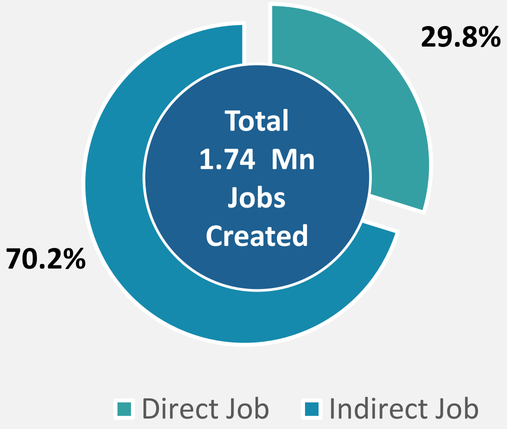
Indirect Jobs

- These arise through the multiplier effect, with supporting sectors like tech infrastructure, logistics, legal services, and advertising agencies creating additional employment. Depending on the sector, 3–11 indirect jobs can be generated per direct role, with e-commerce platforms (those selling creator merchandise) driving significant growth.
- **Marketing and Advertising Roles:** Positions within agencies that help creators promote their work or manage brand partnerships
- **E-commerce Support:** Jobs related to merchandise sales for creators (fulfillment centers, customer service)

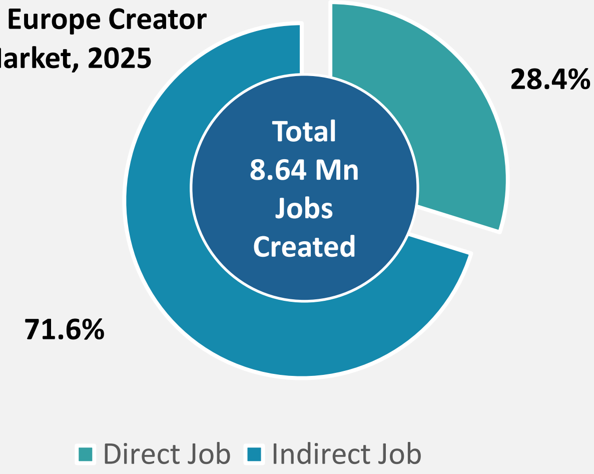
In **2025**, the **creator economy in France** generated an estimated **1.74 million jobs**, encompassing both **direct** (content creators, production teams, platform staff) and **indirect** employment (marketing agencies, tech providers, logistics, and legal services).

France represents approximately **20.1% of all creator economy related employment in Europe.**

Share of Jobs in France Creator Economy Market, 2025



Share of Jobs in Europe Creator Economy Market, 2025



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

JOBS CREATED (DIRECT AND INDIRECT) IN EUROPEAN COUNTRIES, 2025

COHERENT MARKET INSIGHTS

Germany
- Total Jobs: 2.64 Mn
- Direct Jobs: 30.4%
- Indirect Jobs: 69.6%

UK
- Total Jobs: 2.38 Mn
- Direct Jobs: 28.3%
- Indirect Jobs: 71.7%

Italy
- Total Jobs: 0.58 Mn
- Direct Jobs: 26.8%
- Indirect Jobs: 73.2%

Spain
- Total Jobs: 0.39 Mn
- Direct Jobs: 25.3%
- Indirect Jobs: 74.7%

Belgium
- Total Jobs: 0.12 Mn
- Direct Jobs: 24.9%
- Indirect Jobs: 75.1%

Rest of Europe
- Total Jobs: 0.80 Mn
- Direct Jobs: 22.7%
- Indirect Jobs: 77.3%

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FOCUS ON THE MOST IMPACTED SECTORS IN FRANCE’S CREATOR ECONOMY – (1/3)

COHERENT MARKET INSIGHTS

Creator & Influencer Agencies

Role: Talent management, brand partnerships, legal compliance, and content commercialization.

Impact:

- Agencies are moving from *campaign brokers* to *strategic brand partners*.
- They now provide **AI-driven analytics**, **creator education**, and **IP monetization consulting**.
- Post-regulation (ARCOM & ARPP 2024), agencies play a

France Examples:

- **Ykone**, **Follow Agency**, **Talent Web**, **Smile Conseil**, and **Point d’Orgue** expand from influencer management to brand incubation.
- Growing trend of **“creator studios”** internal agency production teams developing long-form branded content.

Key Evolution:

From short-term influencer deals → to long-term creator-brand equity partnerships.

Content Production & Creative Studios

Role: Producing branded, social, or entertainment content for creators and brands.

Impact:

- Massive growth in white-label content production: creators producing campaigns without using their personal channels.
- Shift toward multi-format storytelling (video, audio, live, podcast).
- AI tools (like Runway, Pika Labs, and Synthesia) are transforming production speed and cost efficiency.

France Examples:

- **Jellysmack**, a global leader, scales AI-driven video optimization.
- **Konbini** and **Brut** collaborate with creators to co-produce digital series.
- **HugoDécrypte Studio** expands its newsroom model, introducing co-hosted and bilingual content formats.

Key Evolution:

Traditional production hybrid AI-assisted co-production with creators.

FOCUS ON THE MOST IMPACTED SECTORS IN FRANCE'S CREATOR ECONOMY – (2/3)

COHERENT MARKET INSIGHTS

Tech & Creator Platforms

Role: Infrastructure for analytics, distribution, monetization, and community management.

Impact:

- France is seeing a surge in **creator-tech startups** that empower monetization and data tracking.
- Platforms are embedding **generative AI** for captioning, ideation, and community engagement.
- There's an ecosystem of SaaS tools for *fan monetization, content automation, and brand matching*.

France Examples:

- **Kolsquare** – data-driven influencer intelligence.
- **Favikon** – AI-based influencer scoring and reputation management.
- **Sociabble** – employee advocacy and brand amplification.
- **uTip** & **Tipeee** – fan support and micro-donation platforms.

Key Evolution:

From platform dependence → to diversified, SaaS-enabled creator ecosystems.

Media & Entertainment

Role: News, entertainment, and cultural platforms collaborating with digital-native creators.

Impact:

- Traditional media now integrate creators to *reach Gen Z audiences* and *retain cultural relevance*.
- Creators become **content franchise faces** for TV, OTT, and podcasts.
- Media houses are building *co-creation labs* for social storytelling.

France Examples:

- **France Télévisions** collaborates with YouTubers for educational segments.
- **Le Monde x HugoDécrypte** collaboration on youth news formats.
- **Canal+** launching content partnerships with digital comedians and gamers.

Key Evolution:

From "mainstream vs social" divide → to integrated hybrid media models.

Digital Platforms & Social Networks

Role: Distribution and monetization channels for creator content.

Impact:

- Platforms (YouTube, TikTok, Instagram) are localizing content policies in response to EU and French regulation.
- Growing experimentation with **revenue-sharing**, **subscription models**, and **creator funds**.
- French creators push for better algorithmic fairness and local discovery.

France Examples:

- **TikTok France** launches partnerships with music labels and creators for short-form storytelling.
- **YouTube Space Paris** acts as a creator training and co-production hub.
- **Meta France** experimenting with Reels monetization for local creators

Key Evolution:

From ad-driven platforms → to multi-revenue creator ecosystems with compliance mechanisms.

C HERENT
MARKET INSIGHTS

SECTION 3
EUROPE CREATOR ECONOMY MARKET

Insights on Creators

NUMBER OF CONTENT MONETIZED CREATORS IN FRANCE IN 2025, EVOLUTION VS 2024, AND PROJECTIONS (2032)

Total number of content monetized creators in France, **2024**
303,648

Total number of content monetized creators in France, **2025**
348,058

Total number of content monetized creators in France, **2032**
1,478,575

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS BY CREATOR TIER OF FRANCE, 2025

COHERENT MARKET INSIGHTS

	Amateurs (Nano to Micro)		Professionals (Macro to Mega)	
	Nano Creator (1K–10K followers)	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
No. of Creators, 2025	191,092	109,142	37,100	10,724
Revenue Generated by Creators, US$ Mn, 2025	1,483.1	4,522.6	1,628.9	510.0

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS BY CREATOR TIER OF EUROPE, 2025

	Amateurs (Nano to Micro)		Professionals (Macro to Mega)	
	Nano Creator (1K–10K followers)	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
No. of Creators, 2025	947,934	547,831	182,900	50,116
Revenue Generated by Creators, US$ Mn, 2025	5,980.7	17,498.6	6,568.6	2,795.2

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

REVENUE GENERATED (US$ MN) AND NUMBER OF CREATORS BY IN EUROPEAN COUNTRIES, 2025 (1/2)

COHERENT MARKET INSIGHTS

Revenue (US$ Mn), 2025

Country	Nano (1K–10K)	Micro (10K–100K)	Macro (100K–1M)	Mega (1M+)
Germany	1,815.5	5,234.9	1,994.0	925.5
U.K.	1,790.5	5,122.8	1,966.5	952.8
France	1,483.1	4,522.6	1,628.9	510.0
Italy	325.2	970.9	357.1	132.5
Spain	231.8	687.9	254.5	98.5
Belgium	73.5	212.4	80.8	37.1
Rest of Europe	261.1	747.1	286.8	138.9
Total (Europe)	**5,980.6**	**17,498.6**	**6,568.6**	**2,795.4**

No. Of Creators, 2025

	Amateurs (Nano to Micro)		Professionals (Macro to Mega)	
	Nano Creator (1K–10K followers)	Micro Creator (10K–100K followers	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Germany	287,400	168,525	57,652	13,931
U.K.	259,603	147,809	48,826	18,767
France	191,092	109,142	37,100	10,724
Italy	64,244	37,241	12,301	2,931
Spain	43,107	25,789	8,146	1,517
Belgium	12,896	7,580	2,498	635
Rest of Europe	89,592	51,744	16,377	1,611

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

REVENUE GENERATED (US$ MN) AND NUMBER OF CREATORS BY IN EUROPEAN COUNTRIES, 2025 (2/2)

Relative Weight, 2025

- **Micro Creators (10K–100K): ≈53.3%** of total creators the backbone of brand partnerships and engagement growth.
- **Macro Creators (100K–1M): ≈18.2%** strong monetization, increasingly forming professional agencies or collectives.
- **Nano Creators (1K–10K): ≈20.0%** fastest-growing segment by count (+15–18% YoY) driven by authenticity and UGC campaigns.
- **Mega Creators (1M+): ≈8.5%** slower volume growth but highest revenue per creator; increasingly diversifying into brand ownership and media ventures.

Growth Dynamics (2023–2025 Outlook)

- **Nano Creators (1K–10K followers):**
  This segment continues to **expand rapidly in number** as new creators enter the ecosystem through short-form platforms like TikTok and Instagram Reels. Growth is being fueled by **low entry barriers and rising brand demand for user-generated content (UGC)**. However, income levels remain modest, and sustainability depends on transitioning to the micro tier.
- **Micro Conversion:** Europe witnessing migration of nano creators into the micro segment as monetization tools and creator education improve.
- **Macro Segment Maturity:** Macro creators are expanding into **multi-platform ecosystems (YouTube + TikTok + Instagram)** and professionalizing operations (teams, editors, agencies).
- **Mega Tier Stabilization:** Growth rate is stabilizing at a mature stage, with limited new entrants but increasing financial influence. The focus is now shifting from audience expansion to revenue diversification including merchandise lines, brand ownership, equity partnerships, and media ventures.

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

COHERENT MARKET INSIGHTS

Germany

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	675.6	1,948.1	742.0	344.4
Beauty & Fashion	297.0	856.5	326.2	151.4
Health and Wellness	103.6	298.7	113.8	52.8
Travel and Adventure	185.0	533.5	203.2	94.3
Others (Food and Culinary, Home Decor, etc.)	90.0	259.4	98.8	45.9
Art & Design	206.5	595.3	226.7	105.2
Music	232.8	671.3	255.7	118.7
Sports	186.5	537.7	204.8	95.1
Gaming	383.7	1,106.4	421.4	195.6
Others (Education and Learning, Cosplay, business, etc.)	130.4	376.1	143.3	66.5
Total	**1,815.5**	**5,234.9**	**1,994.0**	**925.5**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

U.K.

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	666.3	1,906.4	731.8	354.6
Beauty & Fashion	292.9	838.1	321.7	155.9
Health and Wellness	102.2	292.3	112.2	54.4
Travel and Adventure	182.5	522.1	200.4	97.1
Others (Food and Culinary, Home Decor, etc.)	88.7	253.9	97.5	47.2
Art & Design	203.6	582.5	223.6	108.4
Music	229.6	656.9	252.2	122.2
Sports	183.9	526.2	202.0	97.9
Gaming	378.4	1,082.7	415.6	201.4
Others (Education and Learning, Cosplay, business, etc.)	128.6	368.0	141.3	68.5
Total	**1,790.5**	**5,122.8**	**1,966.5**	**952.8**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

France

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	561.4	1,712.0	616.6	193.0
Beauty & Fashion	258.6	788.6	284.0	88.9
Health and Wellness	79.4	242.1	87.2	27.3
Travel and Adventure	148.6	453.3	163.2	51.1
Others (Food and Culinary, Home Decor, etc.)	74.8	228.0	82.1	25.7
Art & Design	168.8	514.7	185.4	58.0
Music	177.0	539.7	194.4	60.9
Sports	145.4	443.3	159.7	50.0
Gaming	309.8	944.5	340.2	106.5
Others (Education and Learning, Cosplay, business, etc.)	120.8	368.3	132.7	41.5
Total	**1,483.1**	**4,522.6**	**1,628.9**	**510.0**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

Italy

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	121.0	356.7	122.8	48.6
Beauty & Fashion	53.2	409.1	149.2	60.3
Health and Wellness	18.6	161.1	59.1	19.5
Travel and Adventure	33.1	269.9	102.0	36.1
Others (Food and Culinary, Home Decor, etc.)	16.1	130.8	46.9	16.5
Art & Design	37.0	121.8	39.6	15.9
Music	41.7	117.5	49.3	16.0
Sports	33.4	103.3	37.4	14.8
Gaming	68.7	210.9	78.3	27.2
Others (Education and Learning, Cosplay, business, etc.)	23.4	60.7	29.7	10.0
Total	**325.2**	**971.0**	**357.2**	**132.5**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

COHERENT MARKET INSIGHTS

Spain

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	86.4	256.5	94.9	36.7
Beauty & Fashion	37.0	109.8	40.6	15.7
Health and Wellness	12.5	37.0	13.7	5.3
Travel and Adventure	24.6	73.1	27.1	10.5
Others (Food and Culinary, Home Decor, etc.)	12.3	36.6	13.5	5.2
Art & Design	26.1	77.5	28.7	11.1
Music	26.9	79.8	29.5	11.4
Sports	24.4	72.3	26.8	10.4
Gaming	48.8	145.0	53.6	20.8
Others (Education and Learning, Cosplay, business, etc.)	19.2	56.8	21.0	8.1
Total	**231.7**	**687.9**	**254.5**	**98.5**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

COHERENT MARKET INSIGHTS

Belgium

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	25.5	73.8	28.1	12.9
Beauty & Fashion	10.8	31.1	11.8	5.4
Health and Wellness	4.2	12.1	4.6	2.1
Travel and Adventure	7.0	20.3	7.7	3.5
Others (Food and Culinary, Home Decor, etc.)	3.6	10.3	3.9	1.8
Art & Design	8.5	24.4	9.3	4.3
Music	9.5	27.4	10.4	4.8
Sports	8.5	24.5	9.3	4.3
Gaming	16.1	46.6	17.7	8.1
Others (Education and Learning, Cosplay, business, etc.)	5.4	15.7	6.0	2.7
Total	**73.5**	**212.4**	**80.7**	**37.0**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

INSIGHTS ON AVERAGE REVENUE PER CREATOR TYPE AND BY CONTENT VERTICAL/APPLICATION

Rest of Europe

	Nano Creator (1K–10K followers	Micro Creator (10K–100K followers)	Macro Creator (100K–1M followers)	Mega or celebrity Creator (1M+ followers)
Lifestyle	91.4	261.5	100.4	48.6
Beauty & Fashion	40.5	115.9	44.5	21.6
Health and Wellness	12.9	36.9	14.1	6.9
Travel and Adventure	24.7	70.7	27.1	13.1
Others (Food and Culinary, Home Decor, etc.)	13.3	38.0	14.6	7.1
Art & Design	30.0	85.9	33.0	16.0
Music	35.9	102.7	39.4	19.1
Sports	30.0	85.8	33.0	16.0
Gaming	53.7	153.7	59.0	28.6
Others (Education and Learning, Cosplay, business, etc.)	20.0	57.3	22.0	10.7
Total	**261.1**	**747.1**	**286.8**	**139.0**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS

COHERENT MARKET INSIGHTS

Name: Raphaël Varane
Profile ID: @raphaelvarane
Content Type: Sports Performance, Football Highlights, Training Lifestyle, Family, Brand Collaborations
Content Niche: Sports & Football Lifestyle
Follower/Subscriber Count: 23 Million
Engagement Metric: 1.7 %
Country: France
Age: 32
Gender: Male
Monetization Strategies: Sponsored partnerships with premium sportswear and lifestyle brands; ambassadorial deals leveraging his reputation as a professional footballer; participation in digital campaigns promoting youth football and sports education; equity stakes and representation projects through **@comofootball** (club association).
Brand Collaborations: Adidas, Puma, TCL, Comme des Garçons, and French sports tech startups.

Name: Karim Benzema
Profile ID: @karimbenzema
Content Type: Sports, Luxury Lifestyle, Fitness, Automotive, Philanthropy
Content Niche: Sports & Luxury Lifestyle
Follower/Subscriber Count: 76.4 Million
Engagement Metric: 0.7 %
Country: France
Age: 37
Gender: Male
Monetization Strategies: Long-term sponsorships with global brands; ambassador roles in luxury, fashion, and automotive sectors; personal brand extensions including fitness ventures and limited-edition collaborations; media and documentary appearances showcasing his football journey.
Brand Collaborations: Adidas, Fendi, Hyundai, Jean Paul Gaultier, and EA Sports FIFA Series.

Name: Zinedine Zidane
Profile ID: @zidane
Content Type: Sports Legacy, Football Training, Leadership, Family, and Brand Ambassadorship
Content Niche: Sports, Football Leadership & Brand Representation
Follower/Subscriber Count: 44.2 Million
Engagement Metric: 1.2 %
Country: France
Age: 53
Gender: Male
Monetization Strategies: Global brand ambassador roles; ownership and operation of **@z5sport** and **@z5padel** facilities; strategic investments in sports infrastructure and social causes; media and public speaking engagements; licensing of name and image rights for branded collaborations.
Brand Collaborations: Adidas, Volvic, Danone, Orange, and Audi.

EUROPE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS

COHERENT MARKET INSIGHTS

Name: Dua Lipa
Profile ID: @dualipa
Content Type: Music, Fashion, Lifestyle, and Entertainment
Content Niche: Pop Music & Culture
Follower/Subscriber Count: 87.6 Million
Engagement Metric: ~1.2%
Country: United Kingdom
Age: 30
Gender: Female
Monetization Strategies: Dua Lipa has evolved from a music creator to a diversified brand entrepreneur. Her revenue streams include music sales and streaming, brand endorsements, fashion collaborations, and her content platform **Service95**, which integrates media, culture, and publishing. She also earns from live performances, tours, and IP licensing of her music and brand collaborations.
Brand Collaborations: Worked with Versace, Yves Saint Laurent, Puma, and Evian. Partnered with brands for campaigns around empowerment and sustainability. Her brand ventures such as **Service95** and the **Sunny Hill Festival** illustrate her transition into a media entrepreneur within the European creator economy.

Name: Cristiano Ronaldo
Profile ID: @cristiano
Content Type: Sports, Fitness, Luxury Lifestyle, and Brand Promotion
Content Niche: Sports & Global Celebrity Influence
Follower/Subscriber Count: 666 Million
Engagement Metric: ~1.28%
Country: Portugal
Age: 40
Gender: Male
Monetization Strategies: Ronaldo represents one of the most advanced creator-business models globally. His income spans brand endorsements, his CR7 lifestyle and fashion brand, sponsored social posts, sports investments, and fitness ventures. He is also one of the highest-paid individuals per post globally, commanding over USD 2 million per Instagram post.
Brand Collaborations: Long-term partnerships with Nike, Clear, Binance, and Louis Vuitton. Owns **CR7 Eyewear**, **CR7 Hotels**, and **CR7 Fitness Gyms**, which collectively form a hybrid of personal branding and diversified entrepreneurship. His model has inspired European athletes to professionalize content-based brand monetization.

Name: Gareth Bale
Profile ID: @garethbale11
Content Type: Sports, Golf, Lifestyle, and Philanthropy
Content Niche: Sports & Luxury Lifestyle
Follower/Subscriber Count: 53.2 Million
Engagement Metric: 0.3%
Country: United Kingdom
Age: 36
Gender: Male
Monetization Strategies: Gareth Bale's content strategy blends athletic legacy with lifestyle and investment narratives. His revenue comes from sponsorships, real estate investments, golf ventures, and post-retirement media appearances. While less active than peers, he maintains a premium brand image tied to luxury and performance.
Brand Collaborations: Has collaborated with Adidas, BT Sport, and EA Sports. Invested in **golf and sports tech ventures** and uses digital channels for selective brand communication, reinforcing a premium lifestyle positioning.

FRANCE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS (1/2)

Name: Tuvok12
Profile ID: @Tuvok
Content Type: Entertainment, Comedy Skits, Lifestyle Vlogs, Public Challenges
Content Niche: Entertainment & Vlogging
Follower/Subscriber Count: 9.9 Million
Engagement Metric: 2.23%
Country: France
Age: 25
Gender: Male
Monetization Strategies: Primarily earns from brand promotions integrated into comedic and travel content; event appearances ("Don't miss me in your city!") and collaborations with other French YouTubers; live shows and sponsored meetups; secondary income from platform ads and merchandise drops linked to viral content.
Brand Collaborations: Collaborated with lifestyle and event brands for city tours, youth fashion labels, and digital campaigns targeting Gen Z audiences.

Name: GIMS
Profile ID: @GIMS
Content Type: Music Videos, Behind-the-Scenes Studio Sessions, Fashion, Lifestyle
Content Niche: Music & Entertainment
Follower/Subscriber Count: 14 Million
Engagement Metric: 1.2%
Country: France
Age: 39
Gender: Male
Monetization Strategies: Multiple income streams including streaming revenue, concert tours, and brand sponsorships; extensive music catalog monetization through digital platforms (YouTube, Spotify, Deezer); collaborations with international artists; licensing of music and IP for film and television; luxury brand endorsements in fashion and accessories.
Brand Collaborations: Partnerships with brands such as Balenciaga, Adidas, and Spotify France; co-branded campaigns linking music and lifestyle culture; collaborations for perfume and apparel lines.

Name: Soolking Officiel
Profile ID: @SoolkingOff
Content Type: Music, Rap Videos, Studio Sessions, Live Performance Snippets
Content Niche: Music – Rap, Pop, Urban Culture
Follower/Subscriber Count: 11.1 Million
Engagement Metric: 0.3 %
Country: France
Age: 35
Gender: Male
Monetization Strategies: Revenue derived from digital music streaming, live tours, and brand sponsorships within urban culture and streetwear; monetizes through YouTube ad revenue, concert ticket sales, and cross-border collaborations in North Africa and Francophone markets; growing influence in artist-brand partnerships and limited edition drops.
Brand Collaborations: Collaborations with Puma, Red Bull Music, and cultural festivals across France and Maghreb; featured in branded music projects and social awareness campaigns.

FRANCE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS (2/2)

COHERENT MARKET INSIGHTS

Name: Squeezie
Profile ID: @squeezie
Content Type: Entertainment, Gaming, Humor, Challenges, Music Projects
Content Niche: Entertainment, Gaming, Comedy, Influencer-Led Projects
Follower/Subscriber Count: 20.6 Million (YouTube; rounded, varies by year)
Engagement Metric (Tentative): 1.85%
Country: France
Age: 28
Gender: Male
Monetization Strategies: Squeezie monetizes through premium brand sponsorships, high-volume YouTube ad revenue, viral challenge content, and music projects. He also earns from merchandise drops, live event productions like GP Explorer, gaming partnerships, and collaborative creator content. His diversified model blends entertainment, gaming, music, and large-scale influencer events for sustained multi-stream revenue.
Brand Collaborations: Collaborated with major gaming, tech, fashion, and lifestyle brands, integrating sponsors into high-impact challenge videos, music projects, and large-scale events like GP Explorer.

Name: Thibault Garcia
Profile ID: @thibaultgarcia
Content Type: Lifestyle, Fashion, Music, Travel, Family-Oriented Vlogs
Content Niche: Lifestyle & Entertainment (YouTube-focused)
Follower/Subscriber Count: 4.4 Million
Engagement Metric (Tentative): 1.25%
Country: France
Age: 32
Gender: Male
Monetization Strategies: Thibault monetizes through integrated lifestyle and fashion brand partnerships, sponsored travel content, and music-led engagement campaigns. He earns from YouTube ad revenue, family-friendly vlogging content, and collaborations with other French influencers. Additional income streams include merchandise drops, appearances, luxury product placements, and influencer campaigns targeting lifestyle, grooming, travel, and youth fashion audiences.
Brand Collaborations: Collaborated with fashion, grooming, luxury lifestyle, and travel brands through sponsored vlogs, product placements, family content integrations, and promotional partnerships across YouTube and social channels.

Name: Thiboinshape
Profile ID: @tiboinshape
Content Type: Fitness, Motivation, Humor, Lifestyle, Vlogs
Content Niche: Fitness & Motivation, Health, Comedy Vlogs
Follower/Subscriber Count: 19.3 Million
Engagement Metric (Tentative): 1.6%
Country: France
Age: 31
Gender: Male
Monetization Strategies: Thiboinshape monetizes through fitness-focused brand sponsorships, high-volume YouTube ad revenue, motivational and humor-driven challenge content, and lifestyle collaborations. He earns from fitness merchandise, supplements, branded workout gear, and apparel lines. Additional revenue comes from influencer campaigns, fan events, sponsored fitness challenges, and creator-to-creator crossovers that generate strong engagement and multi-stream monetization.
Brand Collaborations: Collaborated with leading fitness, sports nutrition, apparel, and lifestyle brands, integrating sponsor messaging into workout videos, humor challenges, and motivational content geared toward young European audiences.

EUROPE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS

Name: Dan Rhodes
Profile ID: @danrhodes
Content Type: Magic, Entertainment, and Challenge Videos
Content Niche: Illusion, Comedy, and Performance-Based Entertainment
Follower/Subscriber Count: 26.6 Million
Engagement Metric: 0.9%
Country: United Kingdom
Age: 21
Gender: Male
Monetization Strategies: Dan Rhodes capitalizes on short-form viral content and digital showmanship. His monetization includes brand sponsorships, YouTube ad revenue, live event appearances, and collaborations with entertainment brands. He has expanded into personal branding, offering magic tutorials and branded merchandise targeting youth audiences.
Brand Collaborations: Works with entertainment and consumer brands that focus on Gen Z engagement. Has collaborated with production studios and event organizers for stage performances and digital campaigns. His "Expect the Unexpected" branding aligns with performance-based storytelling and high audience retention.

Name: Miss Katy
Profile ID: @misskaty1133
Content Type: Kids Entertainment, Toys, and Family-Oriented Videos
Content Niche: Child-Friendly Content & Edutainment
Follower/Subscriber Count: 25.5 Million
Engagement Metric: 1.3%
Country: United Kingdom
Age: 10
Gender: Female
Monetization Strategies: Miss Katy represents the children's digital entertainment segment within the UK creator economy. Her monetization includes YouTube ad revenue, toy brand sponsorships, and family-driven content monetization. Parent-managed brand collaborations emphasize compliance with child content regulations and sponsorship transparency.
Brand Collaborations: Associated with toy companies, family entertainment brands, and educational content platforms. Often participates in promotional content for toy launches, family-friendly apps, and event-based partnerships, positioning her channel as one of the top children's entertainment creators in Europe.

Name: Mister Max
Profile ID: @MrMaxLife
Platform(s) Used: YouTube, Instagram, TikTok
Content Type: Family Entertainment and Lifestyle
Content Niche: Kids Entertainment & Vlogging
Follower/Subscriber Count: 25.1 Million
Engagement Metric: 1.4% (
Country: United Kingdom
Age: 12
Gender: Male
Monetization Strategies: Mister Max's channel follows a family-managed creator model emphasizing consistent, child-friendly entertainment. Revenue sources include YouTube ads, brand sponsorships, family campaigns, and licensing deals related to children's toys and games. His platform targets pre-teen audiences through humor, exploration, and interactive storytelling.
Brand Collaborations: Works with toy and children's lifestyle brands, educational product companies, and entertainment studios. His channel's family-centric model attracts global advertisers looking for safe, high-viewership children's content aligned with UK's COPPA and child protection standards.

FRANCE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS

Name: Léa Elui
Profile ID: @leaelui
Content Type: Dance, Lifestyle, Beauty, and Entertainment
Content Niche: Dance & Entertainment
Follower/Subscriber Count: 18.1 Million
Engagement Metric: 1.4 %
Country: France
Age: 24
Gender: Female
Monetization Strategies: Léa leverages her dance and lifestyle content for global brand collaborations in fashion and beauty. She monetizes through sponsored content, affiliate campaigns, appearances, and social media ambassadorships. She also earns via platform revenue (TikTok Creator Fund, YouTube Shorts) and fashion partnerships targeting Gen Z audiences.
Brand Collaborations: Collaborated with Dior, L'Oréal Paris, and Guess; regularly features in global influencer campaigns and digital fashion events; her influence extends to U.S. and European audiences, making her one of France's most internationally recognized creators.

Name: Tibo InShape
Profile ID: @tiboinshape
Content Type: Fitness, Motivation, Humor, and Vlogs
Content Niche: Fitness & Motivation
Follower/Subscriber Count: 19.3 Million
Engagement Metric: 1.6%
Country: France
Age: 33
Gender: Male
Monetization Strategies: Tibo has diversified income streams his **InShape Nutrition** brand, fitness coaching programs, sponsorships with sports and nutrition companies, and platform monetization via YouTube. He also generates significant merchandise and supplement sales through his D2C brand ecosystem.
Brand Collaborations: Works with brands like MyProtein, Gymshark, and Decathlon; his own brand "InShape Nutrition" has become a leading fitness label in France; also engages in public campaigns on health and motivation, broadening his visibility beyond fitness audiences.

Name: Akamz
Profile ID: @akamztwenty20
Content Type: Comedy, Dance, Rap, and Short-form Entertainment
Content Niche: Entertainment & Urban Culture
Follower/Subscriber Count: 24.9 Million
Engagement Metric: 2.4%
Country: France
Age: 25
Gender: Male
Monetization Strategies: Akamz earns primarily through high-visibility brand partnerships, short-form ad monetization, and collaborations with music artists. He integrates entertainment with lifestyle and streetwear branding. His content's viral nature also supports paid appearances and music tie-ins.
Brand Collaborations: Partnered with Nike, TikTok France, and Spotify France for branded entertainment campaigns; has also collaborated with French music labels for promotional content, bridging entertainment and music marketing spheres.

EUROPE CREATOR ECONOMY MARKET, LEADING CONTENT CREATORS AND INFLUENCERS

Name: Noelgoescrazy
Profile ID: @noelgoescrazy
Country: Germany
Follower/Subscriber Count: 43.8 Million
Engagement Rate: 1.9%
Average Likes: 8.1K
Gender: Male
Age: 24 (estimated)
Dominant Niches: Comedy, Lifestyle, Entertainment
Monetization Strategies: Noelgoescrazy primarily monetizes through brand partnerships, comedy content sponsorships, and social media collaborations. He utilizes his massive TikTok following to promote lifestyle and fashion products and partners with entertainment and digital-first consumer brands. Additional income comes from event appearances, social media campaigns, and merchandise sales aligned with his humorous personal brand.
Brand Collaborations: Known to collaborate with global consumer and fashion brands targeting Gen Z audiences. Works with tech and lifestyle labels for promotional skits, leveraging his comedic tone to drive engagement and viral reach across platforms.

Name: YZ (Younes Zarou)
Profile ID: @youneszarou
Country: Germany
Follower/Subscriber Count: 56.9 Million
Engagement Rate: 0.20%
Average Likes: 41.4K
Gender: Male
Age: 26
Dominant Niches: Creativity, Visual Effects, Inspiration
Monetization Strategies: Younes Zarou stands out for visually immersive, illusion-based video content. His monetization stems from brand sponsorships, ad revenue (especially on TikTok and YouTube), creative collaborations with major brands, and speaking engagements related to innovation and digital creativity. He also earns from content licensing and partnerships with production companies for campaign-based storytelling.
Brand Collaborations: Collaborated with leading technology, camera, and lifestyle brands that align with his visually creative storytelling. His partnerships emphasize innovation, authenticity, and digital artistry, making him one of Germany's most globally recognized creators.

Name: CZN Burak
Profile ID: @cznburak
Country: United Kingdom (based; Turkish origin with global operations)
Follower/Subscriber Count: 74.7 Million
Engagement Rate: 0.20%
Average Likes: 9.1K
Gender: Male
Age: 30
Dominant Niches: Food, Hospitality, Entertainment
Monetization Strategies: CZN Burak combines social media influence with real-world entrepreneurship. His monetization sources include restaurant chains (CZN Burak brand), brand endorsements, culinary show appearances, and digital ad revenue. His cross-platform popularity supports international partnerships in food, tourism, and hospitality branding.
Brand Collaborations: Collaborated with luxury hospitality and consumer food brands, promoting culinary excellence and cultural storytelling. His digital persona reinforces his global restaurant empire, bridging influencer marketing and real-world brand building.

WHAT MOTIVATES CREATORS? MORE THAN MONEY AND FAME (1/2)

COHERENT MARKET INSIGHTS

WHAT MOTIVATES CREATORS?

Self-Expression is the Core Driver: Nearly half of creators (≈ 49%) began creating content to **express themselves** or share personal perspectives, making creativity and individuality the strongest motivation.

Enjoyment and Passion Lead Participation: About 43% of creators said content creation "looked fun," while another 40% wanted to explore a personal interest or passion, showing that enjoyment outweighs monetary goals.

Personal Growth and Challenge: Around **one-third (≈ 34%)** of creators are motivated by the **desire to challenge themselves** or learn new skills, reflecting the rise of creators treating content as a craft.

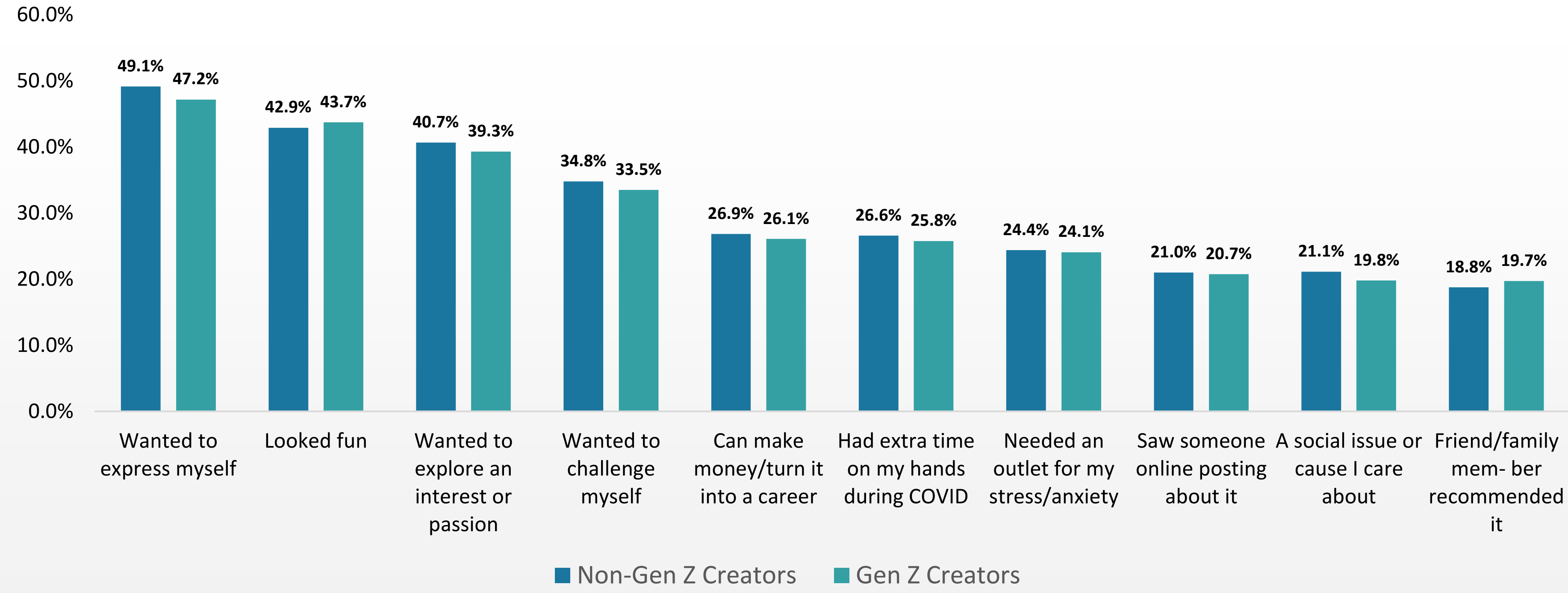
Emotional and Social Well-Being: Roughly **24–26%** started creating content as an **outlet for stress, anxiety, or free time**, highlighting creativity as a form of self-care and connection.

Values Over Virality: Less than one-fourth were motivated by money, trends, or recommendations proving that **authentic self-expression and purpose** matter more than fame or financial rewards in 2025.

WHAT MOTIVATES CREATORS? MORE THAN MONEY AND FAME (2/2)

COHERENT MARKET INSIGHTS

Motivations of Creators



COHERENT MARKET INSIGHTS

Trust and Authentic Recommendations

- The leading motivator for consumers purchasing from creators in 2025 is **trust in creator authenticity**.
- Over **68% of European consumers** say they are more likely to buy a product recommended by a creator they follow than through a paid ad.
- Consumers perceive creators as **real users** rather than advertisers, which increases credibility and purchase intent

Relatable and Personalized Content

- Audiences are drawn to creators who share personal experiences and demonstrate products in everyday settings.
- Relatability and lifestyle alignment drive strong emotional connections, making consumers feel that purchases reflect their own preferences and values.
- Short-form storytelling, tutorials, and “day-in-the-life” videos strongly influence conversion rates across Europe.

Social Proof and Community Influence

- Consumers purchase based on peer validation within creator communities.
- Seeing others interact, comment, and share reinforces confidence in product quality and relevance.
- This “community effect” is particularly strong among Gen Z audiences, who rely on creator-led social circles for purchase decisions.

Exclusive Offers and Limited Access

- Creator-exclusive product drops, discount codes, and co-branded collaborations motivate impulse buying and early adoption.
- Brands offering creator-led exclusivity experience higher engagement and repeat sales.

Alignment with Values and Lifestyle

- Consumers increasingly support creators who mirror their ethical, social, or environmental beliefs.
- Across Europe, sustainability and transparency are growing motivators, especially among younger consumers in France, Germany, and the Nordics.

FRANCE CREATOR ECONOMY MARKET, CONSUMER BEHAVIOR AND AUDIENCE INSIGHTS (2/2)

COHERENT MARKET INSIGHTS

Top Product Categories in the Creator Economy

Personal Care & Beauty

- Continues to be the largest and most active segment for creator-led marketing.
- High engagement from creators promoting skincare, cosmetics, and haircare products, driven by authenticity and tutorial-based content.
- Influencer recommendations now influence over 60% of beauty purchases among Gen Z and Millennials in Europe.

Fashion & Apparel

- Remains one of the fastest-moving categories for creator collaborations.
- Strong creator presence on Instagram, TikTok, and Pinterest, driving trends in streetwear, sustainable fashion, and luxury resale.
- Consumers increasingly trust creator styling advice over brand advertising, making creators central to purchase decisions.

Food & Drink

- Gaining momentum through recipe content, food reviews, and wellness trends.
- Creators drive trial for functional beverages, organic foods, and home cooking brands.
- Short-form recipe videos have become key conversion tools on TikTok and YouTube Shorts.

Consumer Impact from Creator Collaborations

Enhanced Engagement

- Collaborations with creators continue to deliver 2–3× higher engagement rates compared to brand-owned posts.
- Creator-led content generates authentic audience interaction, especially on short-form platforms like TikTok and Instagram Reels.
- Brands using creators report an average 35% improvement in content reach across social channels.

Authenticity & Trust

- Over 70% of European consumers say they trust product recommendations from creators more than from traditional ads
- Creator testimonials and real-use content foster emotional credibility and purchase confidence, leading to higher conversion rates.
- Authenticity remains the primary driver of purchase intent, particularly among Gen Z and Millennials.

Strengthened Brand Loyalty & Retention

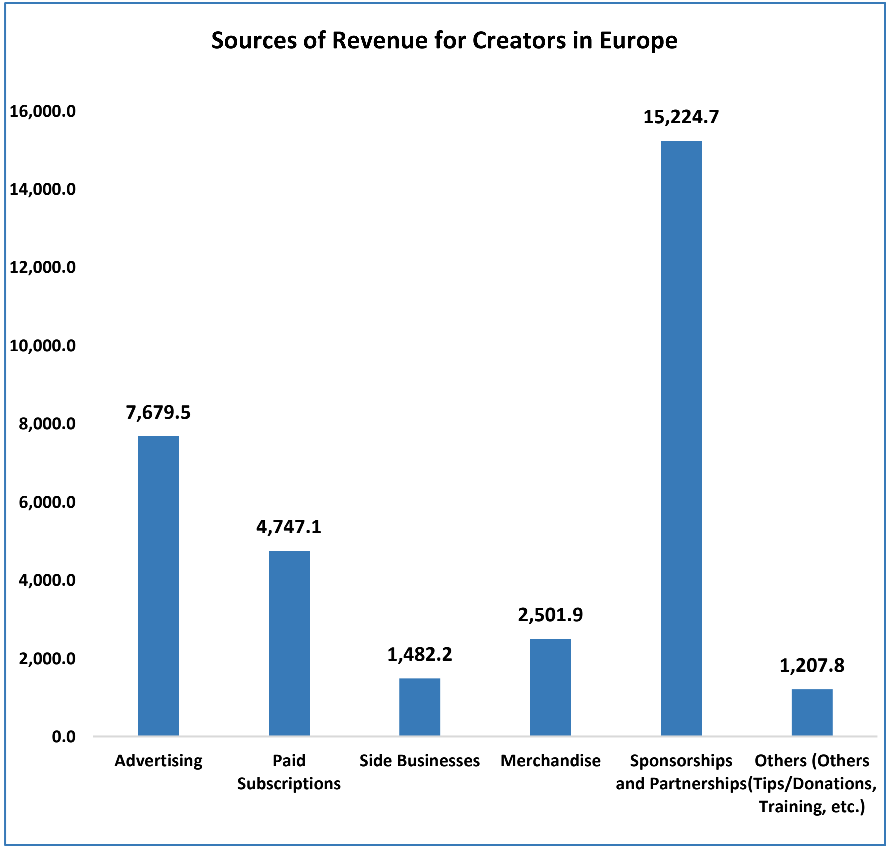
- Co-created and exclusive campaigns with creators help brands build stronger communities and repeat engagement.
- Consumers are 25–30% more likely to repurchase from brands endorsed by trusted creators.
- Long-term collaborations foster brand loyalty by creating a sense of belonging and shared values between the creator, brand, and audience.

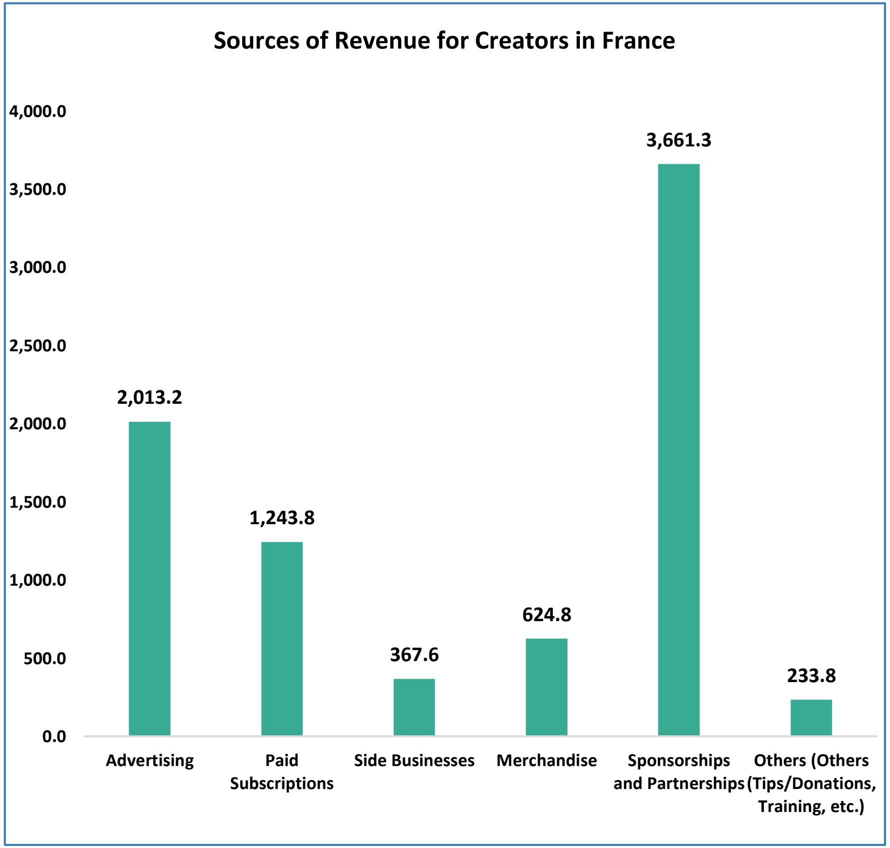
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

SECTION 4
EUROPE CREATOR ECONOMY MARKET

Market Size and Forecast

SOURCES OF REVENUE FOR CREATORS IN FRANCE AND EUROPE – (1/5)





Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

SOURCES OF REVENUE FOR CREATORS IN FRANCE AND EUROPE – (2/5)

Brand Partnerships & Sponsorships

- **France:**
  Brand collaborations are the primary source of income for French creators. Major national advertisers such as **L'Oréal, Renault, Decathlon, and Dior** heavily rely on creators for narrative-led campaigns that merge authenticity with brand storytelling. Mid-tier influencers with audiences between **50K–500K followers** are gaining recognition for their ability to target niche communities effectively. These collaborations often emphasize culture, lifestyle, and sustainability aligning with France's creative reputation.
- **Europe:**
  Across Europe, brand partnerships remain the cornerstone of the creator economy, but the ecosystem is more structured. The **UK and Germany** lead in establishing formal influencer marketing agencies and performance-based contracts. Nordic countries prioritize transparency, supported by clear influencer disclosure laws. Additionally, cross-border sponsorships are growing among multilingual creators who can engage audiences across linguistic and national boundaries

Platform Advertising (YouTube AdSense, TikTok Creator Fund, Shorts Bonus, etc.)

- **France:**
  Platform-based advertising remains a steady revenue stream, particularly for entertainment, gaming, and tech content creators. The **CPM (Cost Per Mille)** in France typically ranges between **€1.5 and €4.5**, which is lower than in the UK or Germany but offset by France's high digital viewership rates. Platforms like **TikTok and Twitch** are gaining ground, with many creators using hybrid models combining ad monetization with donations or paid shout-outs.
- **Europe:**
  Across Europe, advertising-based income fluctuates due to algorithmic volatility and shifting platform policies. The **UK, Germany, and Nordics** enjoy higher CPMs ranging from **€3–€8**, reflecting more mature digital ad markets. However, creators across Europe are strategically reducing dependence on ads in favor of subscriptions, courses, and merchandise diversifying income sources for long-term stability.

SOURCES OF REVENUE FOR CREATORS IN FRANCE AND EUROPE – (3/5)

COHERENT MARKET INSIGHTS

Merchandising & Product Lines

- **France:**
  Many French creators have successfully launched their own **product lines** ranging from capsule fashion collections and fitness gear to cosmetics and books. Notable examples include **Tibo InShape's sportswear brand** and **EnjoyPhoenix's beauty and lifestyle products**. Merchandising in France often aligns with the creator's cultural or community identity rather than pure commercial expansion.
- **Europe:**
  In other European markets, merchandise operations are more formalized. **German, Polish, and British creators** typically run their own e-commerce stores or partner with specialized print-on-demand services. Merchandising is viewed as an extension of a creator's brand ecosystem, offering creators more control over pricing and fan engagement.

Paid Subscriptions & Memberships

- **France:**
  Subscription-based revenue streams are becoming increasingly common through **Patreon, YouTube Memberships, and Twitch Subscriptions**. This model resonates particularly with creators in the **podcasting, education, and gaming** sectors. France's "support local creators" culture fosters loyal subscriber bases willing to pay for exclusive or ad-free content.
- **Europe:**
  Northern and Western European markets exhibit more advanced adoption. **UK and Nordic creators** monetize newsletters, behind-the-scenes content, or early-access perks using tools like **Substack** and **Ko-fi**. The emphasis in these markets is on building sustained membership communities that offer recurring income rather than one-time brand deals.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

SOURCES OF REVENUE FOR CREATORS IN FRANCE AND EUROPE – (4/5)

Training, Courses, and Mentorships

- **France:**
  A rapidly growing segment, especially among experienced creators who repurpose their skills such as video editing, photography, or digital marketing into **paid training programs**. Platforms like **Skillshare, Teachable**, and French-based solutions such as **Ornikar** and **MyMooc** are supporting this transition. The trend highlights a shift toward professional knowledge-sharing.
- **Europe:**
  Creators in **Germany, the Netherlands, and Spain** are positioning themselves as **"edupreneurs"**, offering structured courses, certification programs, and masterclasses. The European trend reflects an institutionalization of creator expertise blending education with entertainment, a model increasingly appealing to professional audiences.

Live Events, Tours, and Brand Experiences

- **France:**
  Offline engagement remains a powerful revenue driver. Events such as **Vidéo City Paris** bring creators and fans together for ticketed experiences. Comedy, gaming, and entertainment creators particularly benefit from this stream, monetizing meetups, workshops, and festivals. The rise of hybrid (online + offline) fan experiences also supports post-pandemic recovery in event monetization.
- **Europe:**
  The **UK and Germany** lead in large-scale creator events supported by production agencies and sponsors. These include festivals, branded concerts, and convention partnerships. Live experiences are often tied to merchandise sales or premium fan access, forming part of integrated monetization strategies.

SOURCES OF REVENUE FOR CREATORS IN FRANCE AND EUROPE – (5/5)

Side Businesses & Startups

- **France:**
  A growing number of top French creators have become **entrepreneurs and investors**, channeling profits into **startups, restaurants, fashion brands**, or **production houses**. Many formalize their operations under **SAS (Société par Actions Simplifiée)** structures for optimized tax and ownership flexibility. This evolution signals the maturation of creators into business owners and cultural entrepreneurs.
- **Europe:**
  Across Europe, creators are expanding their business footprint. In the **UK**, creators are launching talent agencies and management firms; in **Germany**, they are developing gaming and tech startups; while in the **Nordics**, the focus is on sustainability-driven products. This transition reflects how creators are moving from content makers to ecosystem builders.

Affiliate Marketing

- **France:**
  Affiliate marketing remains a foundational but smaller income stream, especially popular among **tech reviewers, beauty vloggers, and lifestyle bloggers**. Programs like **Amazon Partner, Rakuten, and Awin France** enable passive income generation through product recommendations.
- **Europe:**
  Affiliate marketing is far more lucrative in **e-commerce-intensive markets** such as the **UK, Germany, and Central Europe**, supported by advanced affiliate tracking and mature online shopping cultures. European creators often integrate affiliate links seamlessly into YouTube reviews and TikTok product demos, driving higher ROI per click.

SECTION 4.1
EUROPE CREATOR ECONOMY MARKET

Market Size and Forecast

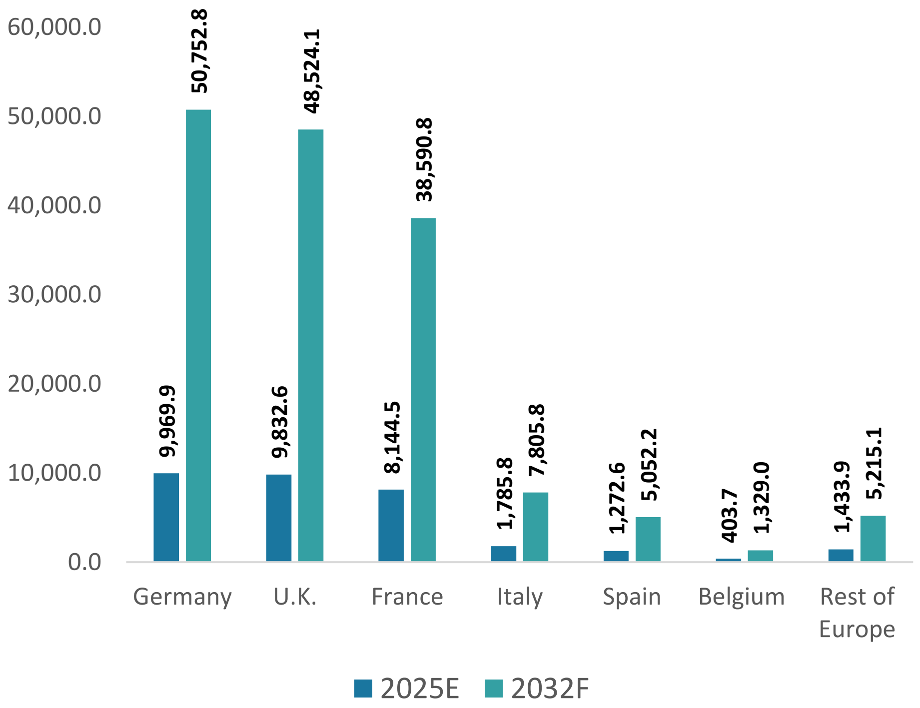
EUROPE CREATOR ECONOMY MARKET, 2020-2032

COHERENT MARKET INSIGHTS

MARKET DYNAMICS

- The **Europe Creator Economy Market in 2025** is valued at approximately **US$ 32,843.1 Million**, expanding steadily as creators evolve into structured digital businesses. Growth is driven by the surge in **short-form video consumption**, expanding **brand collaborations**, and increasing **professionalization of creators** who now operate across multiple platforms. Rising internet penetration, mobile adoption, and audience willingness to pay for premium content have strengthened monetization across Europe.
- Creators are diversifying revenue streams beyond advertising embracing **subscriptions, eCommerce, and educational products** while platforms continue launching new monetization tools such as tipping and membership programs. **Micro and niche creators** now represent the backbone of the ecosystem, accounting for more than half of active creators and driving brand engagement through authenticity and localized reach.
- However, the market faces challenges including **income concentration**, **algorithm dependency**, and **regulatory compliance** under Europe's evolving digital policies. AI integration is reshaping production and analytics, with more than two-thirds of European creators leveraging AI for scripting, editing, or audience insights.

Figure 4.1.1 Europe Creator Economy Market Size (US$ Mn), By Country, 2025 - 2032



EUROPE CREATOR ECONOMY MARKET, BY COUNTRY

TABLE 4.1.1

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, By Country, 2020-2032

Country	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Germany	5,127.1	5,547.0	6,189.3	7,091.0	8,273.1	9,969.9	12,176.3	15,048.6	18,851.4	23,899.4	30,572.1	39,343.2	50,752.8	26.2%
U.K.	5,191.5	5,585.5	6,198.7	7,064.7	8,200.0	9,832.6	11,949.6	14,696.8	18,322.5	23,118.9	29,435.0	37,703.2	48,524.1	25.6%
France	4,668.5	4,920.2	5,352.1	5,982.1	6,832.1	8,144.5	9,841.1	12,034.6	14,919.3	18,720.4	23,703.8	30,196.3	38,590.8	24.9%
Italy	1,039.8	1,095.8	1,192.0	1,332.3	1,517.1	1,785.8	2,131.0	2,574.0	3,152.4	3,908.2	4,890.0	6,156.0	7,805.8	23.5%
Spain	800.2	829.8	888.5	978.0	1,097.0	1,272.6	1,497.0	1,782.8	2,153.1	2,632.7	3,249.3	4,035.3	5,052.2	21.8%
Belgium	294.4	295.8	307.3	328.4	357.9	403.7	462.0	535.4	629.5	749.5	901.1	1,090.3	1,329.0	18.6%
Rest of Europe	965.9	987.1	1,042.2	1,131.5	1,252.2	1,433.9	1,665.2	1,958.1	2,335.4	2,820.7	3,439.0	4,219.3	5,215.1	20.3%
Total	18,087.4	19,261.2	21,170.1	23,908.0	27,529.4	32,843.1	39,722.0	48,630.3	60,363.6	75,849.9	96,190.2	122,743.5	157,269.7	25.1%

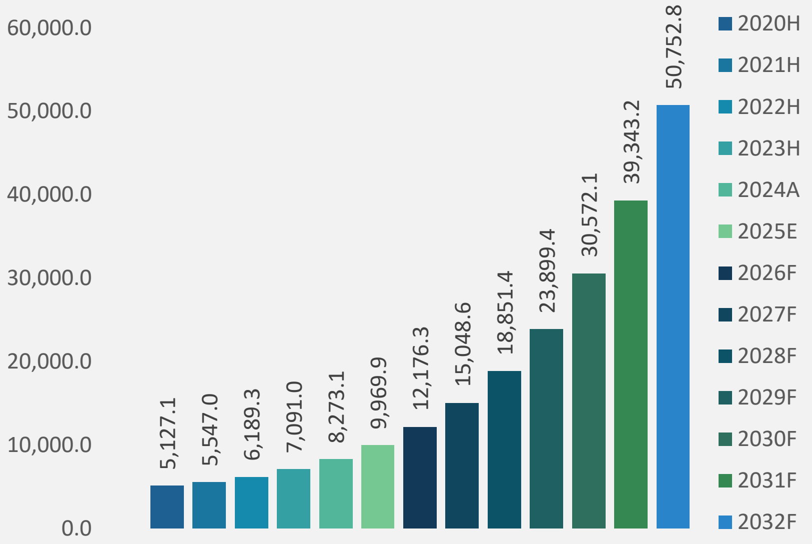
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

TABLE 4.1.1.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, By Country, 2020-2032

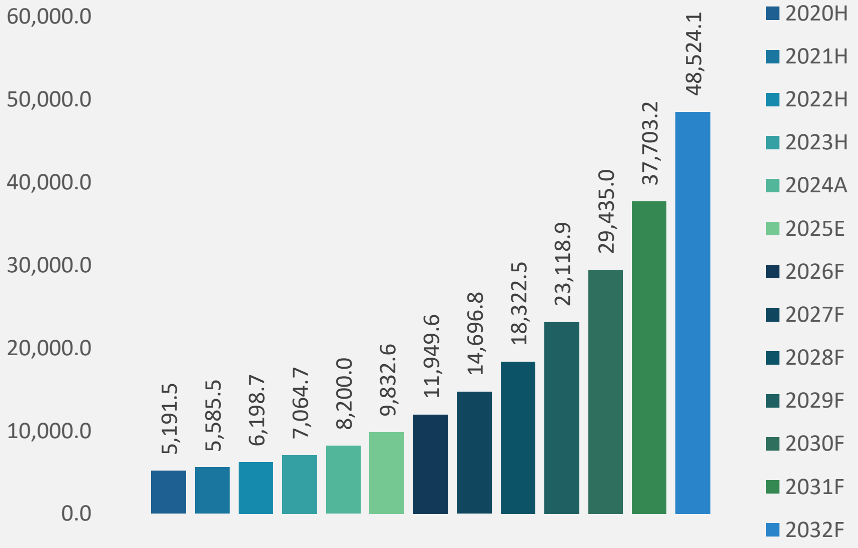
Germany

2025 – 2032
CAGR : 26.20%



U.K.

2025 – 2032
CAGR : 25.60%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

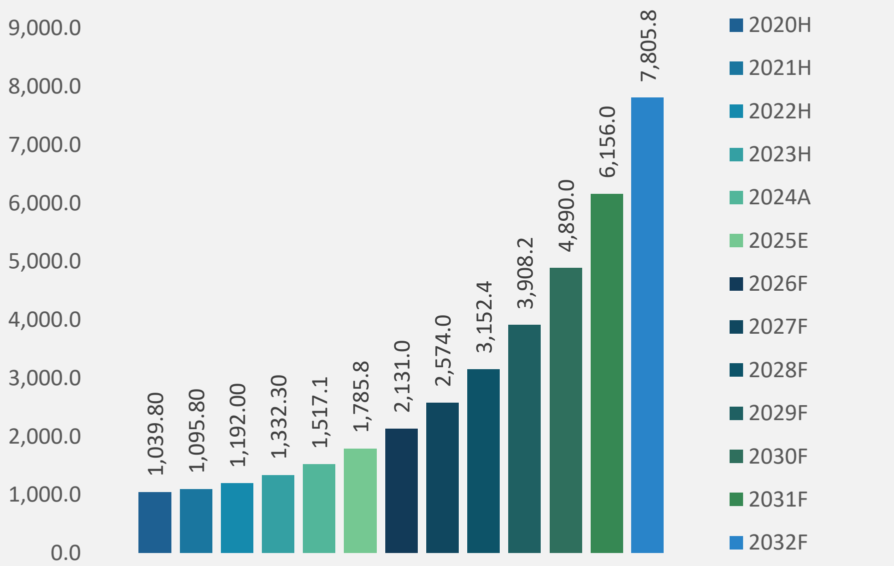
COHERENT MARKET INSIGHTS

TABLE 4.1.1.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, By Country, 2020-2032

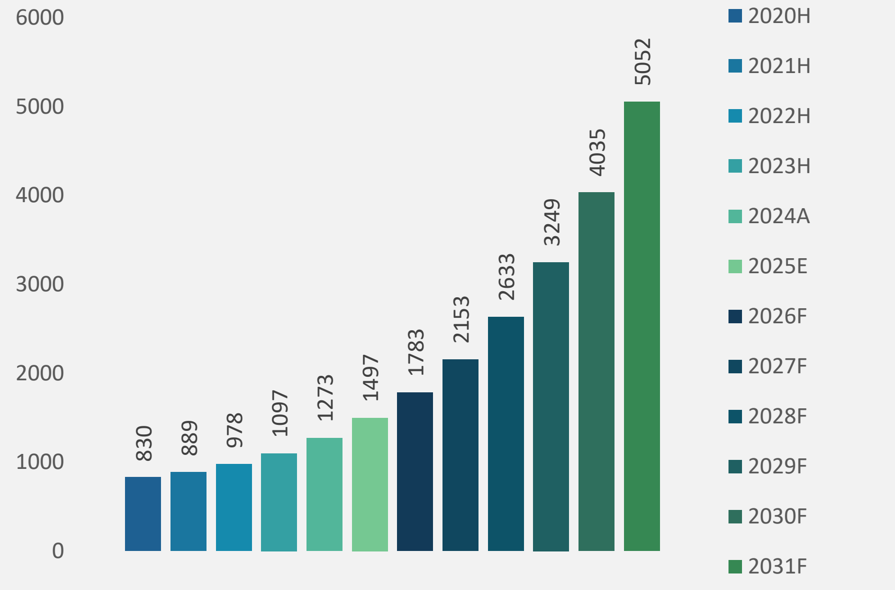
Italy

2025-2032
CAGR : 21.80%



Spain

2025-2032
CAGR : 21.80%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

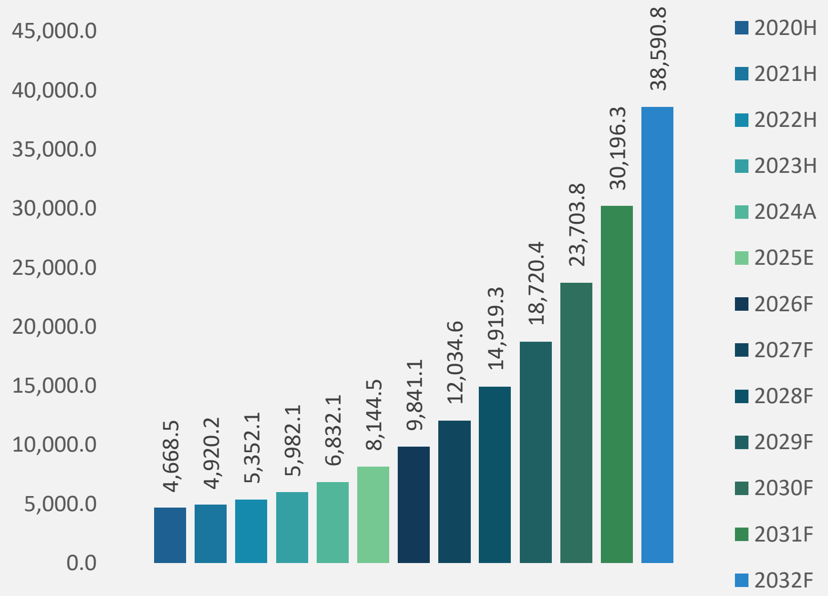
EUROPE CREATOR ECONOMY MARKET, BY COUNTRY

TABLE 4.1.1.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, By Country, 2020-2032

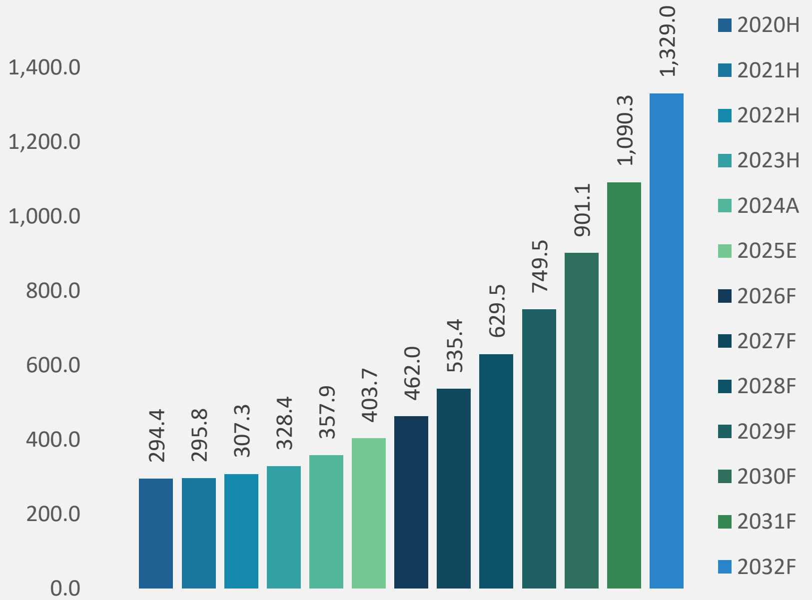
France

2025-2032 CAGR : 24.90%



Belgium

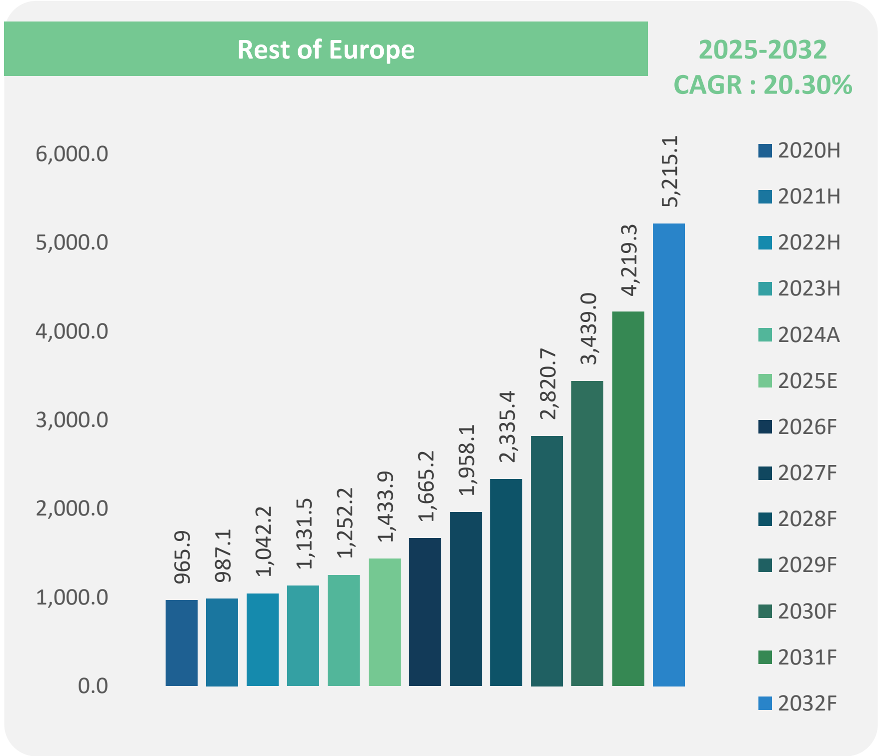
2025-2032 CAGR : 18.60%



EUROPE CREATOR ECONOMY MARKET, BY COUNTRY

TABLE 4.1.1.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, By Country, 2020-2032



EUROPE CREATOR ECONOMY MARKET, BY PLATFORM TYPE

TABLE 4.1.2 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

Platform Type	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Social Media Platforms	7,629.7	8,244.3	9,195.0	10,537.6	12,313.2	14,906.9	18,295.7	22,730.1	28,631.8	36,510.1	46,987.1	60,847.1	79,127.3	**26.9%**
Video Sharing Platforms	4,585.6	4,886.0	5,373.4	6,072.1	6,996.3	8,352.9	10,118.8	12,408.3	15,427.3	19,417.1	24,664.7	31,525.5	40,479.4	**25.3%**
Podcasting Platforms	1,829.6	1,922.1	2,084.1	2,321.8	2,637.1	3,103.5	3,702.5	4,471.3	5,474.7	6,785.8	8,488.4	10,684.2	13,499.5	**23.4%**
Live Streaming Platforms	2,619.9	2,708.4	2,889.7	3,167.6	3,540.1	4,098.9	4,811.3	5,716.5	6,886.3	8,397.4	10,334.6	12,797.7	15,879.5	**21.3%**
eCommerce Platform	827.9	851.6	904.2	986.4	1,097.4	1,265.2	1,478.8	1,749.8	2,099.4	2,550.1	3,126.2	3,856.6	4,763.0	**20.9%**
Others (Crowdfunding Platforms,	594.7	648.6	723.7	822.5	945.3	1,115.7	1,315.0	1,554.3	1,844.0	2,189.4	2,589.1	3,032.3	3,521.0	**17.8%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

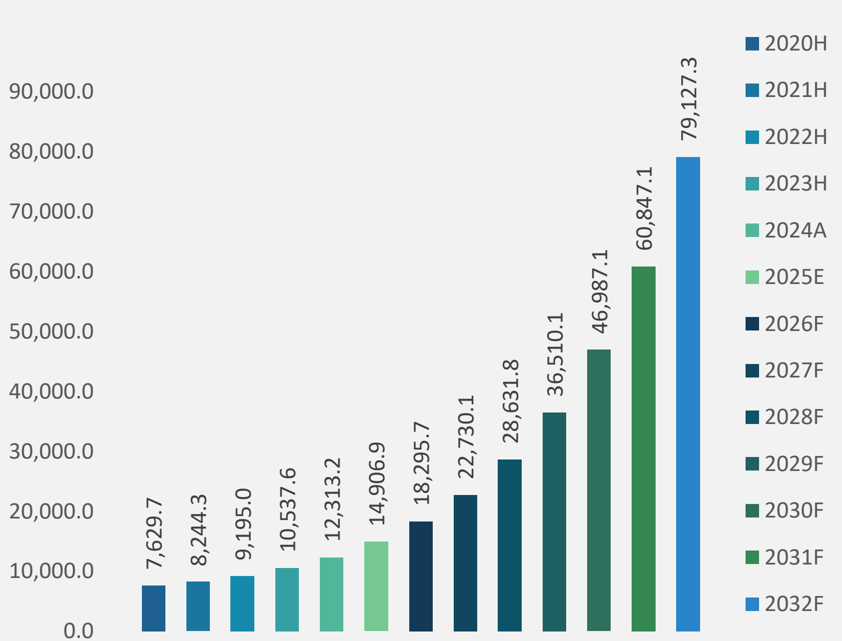
COHERENT MARKET INSIGHTS

TABLE 4.1.2.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

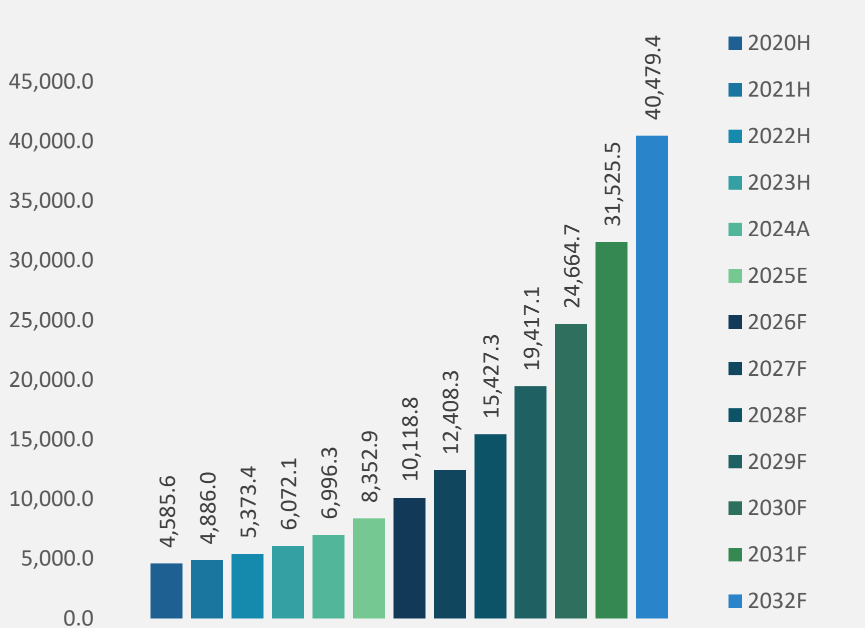
Social Media Platforms

2025-2032 CAGR : 26.90%



Video Sharing Platforms

2025-2032 CAGR : 25.30%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

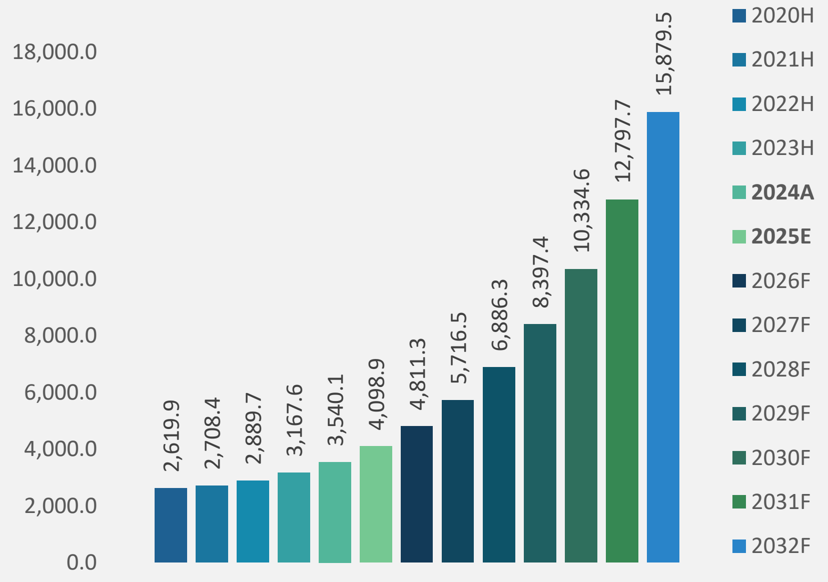
EUROPE CREATOR ECONOMY MARKET, BY PLATFORM TYPE

TABLE 4.1.2.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

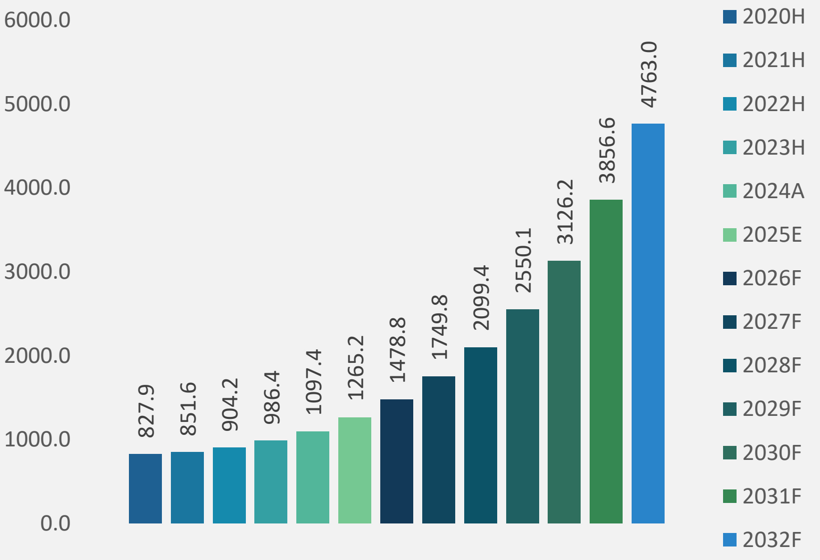
Live Streaming Platforms

2025-2032 CAGR : 21.30%



eCommerce Platform

2025-2032 CAGR : 20.90%



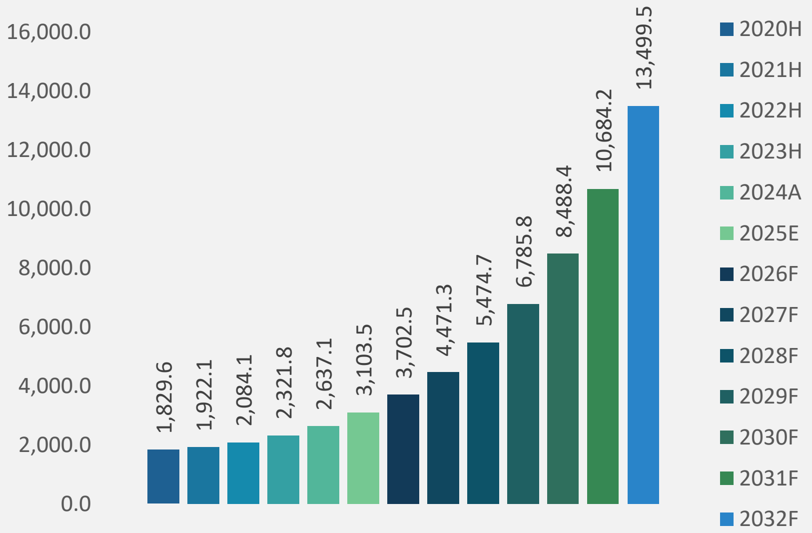
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY PLATFORM TYPE

TABLE 4.1.2.A Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

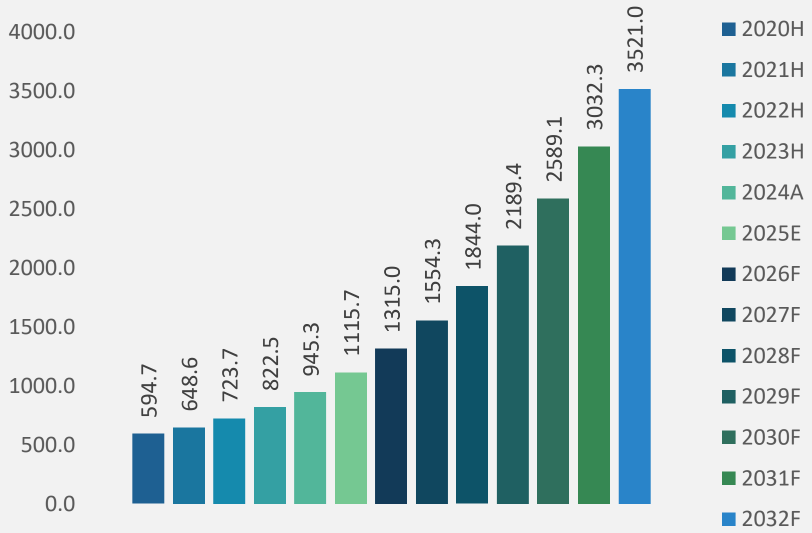
Podcasting Platforms

2025-2032 CAGR : 23.40%



Others (Crowdfunding Platforms)

2025-2032 CAGR : 17.80%



EUROPE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.1.3 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

Revenue Model	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Advertising	4,260.1	4,529.8	4,971.4	5,605.9	6,445.6	7,679.5	9,275.3	11,339.7	14,055.8	17,636.5	22,333.6	28,456.8	36,394.8	**24.9%**
Paid Subscriptions	2,789.2	2,931.8	3,180.8	3,545.8	4,030.3	4,747.1	5,668.3	6,851.2	8,396.1	10,416.0	13,041.4	16,429.9	20,812.3	**23.5%**
Side Businesses	993.9	1,017.5	1,075.1	1,167.2	1,292.2	1,482.2	1,723.6	2,028.9	2,421.5	2,925.7	3,567.6	4,377.5	5,393.8	**20.3%**
Merchandise	1,607.8	1,660.1	1,769.2	1,937.3	2,162.9	2,501.9	2,933.9	3,482.7	4,191.5	5,106.6	6,278.9	7,768.4	9,612.0	**21.2%**
Sponsorships and Partnerships	7,742.3	8,377.9	9,356.7	10,736.8	12,561.4	15,224.7	18,706.6	23,266.0	29,338.5	37,450.6	48,247.2	62,542.1	81,322.2	**27.0%**
Others (Others (Tips/Donations, Training, etc.)	694.1	744.0	817.0	915.0	1,037.1	1,207.8	1,414.4	1,661.8	1,960.2	2,314.4	2,721.5	3,168.8	3,734.6	**17.5%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

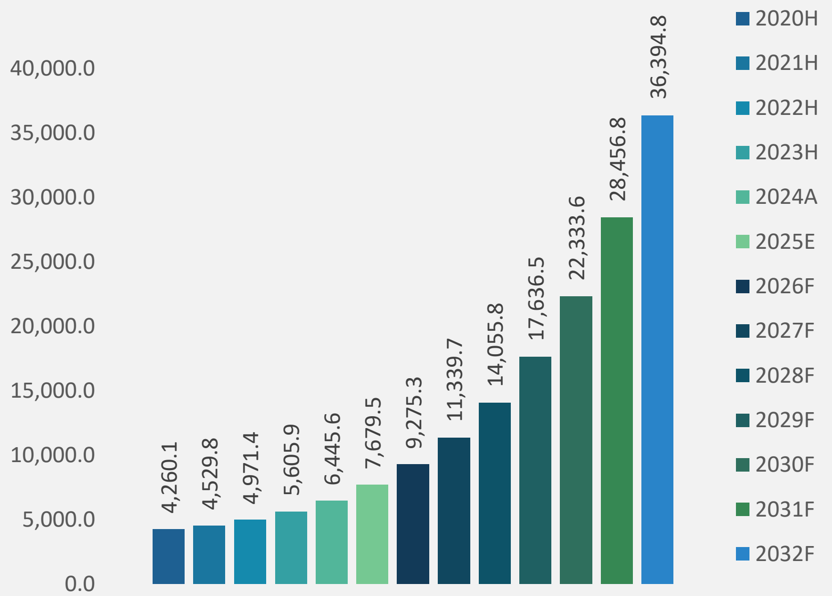
EUROPE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.1.3.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

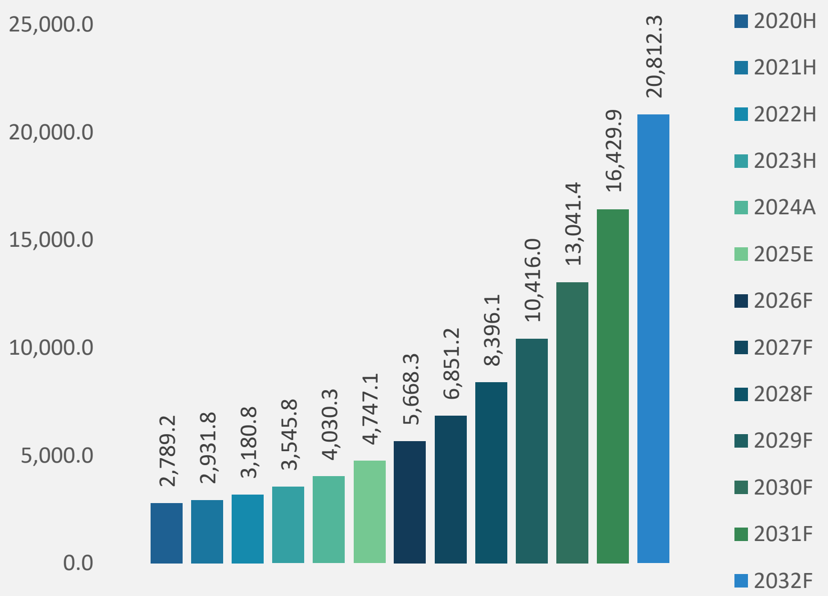
Advertising

2025-2032 CAGR : 23.50%



Paid Subscriptions

2025-2032 CAGR : 23.50%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

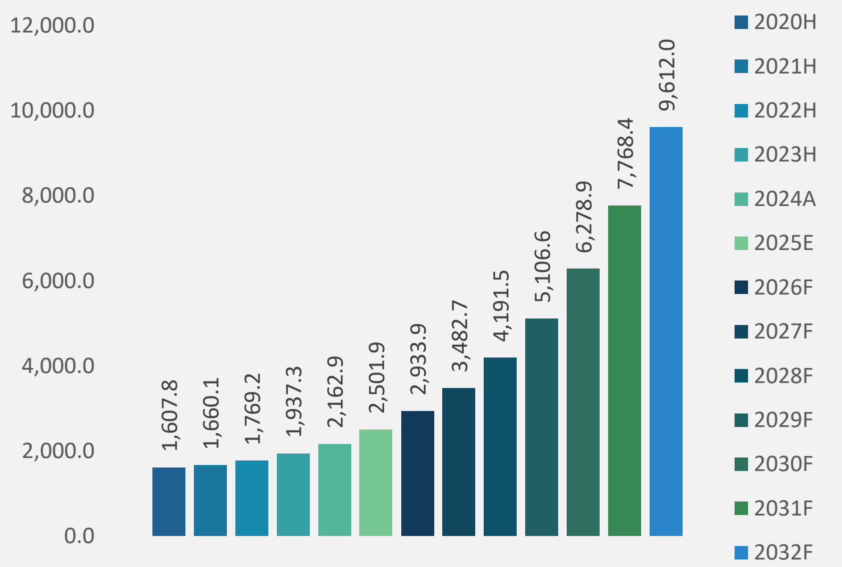
EUROPE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.1.3.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

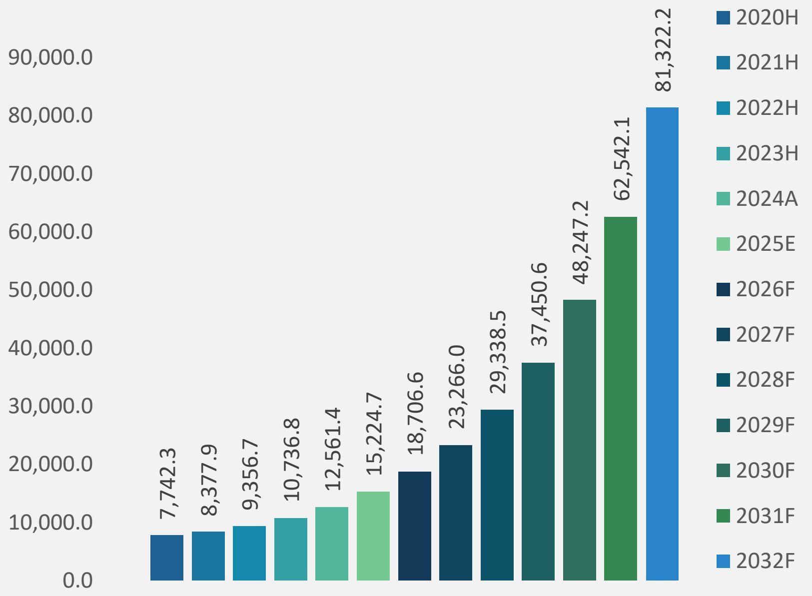
Merchandise

2025-2032
CAGR : 21.20%



Sponsorships and Partnerships

2025-2032
CAGR : 27.00%



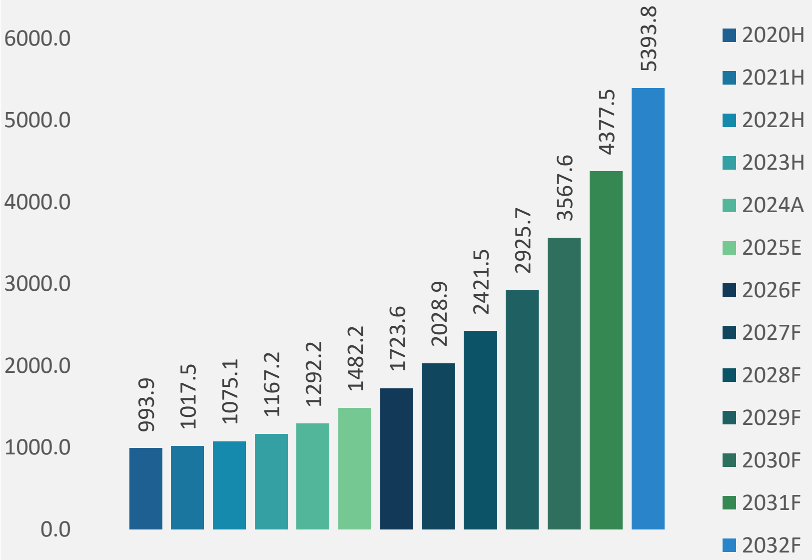
EUROPE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.1.3.B

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

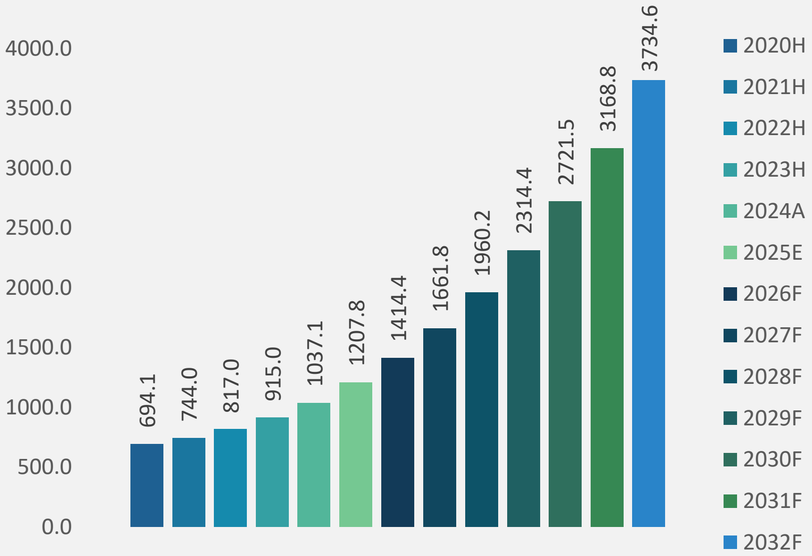
Side Businesses

2025-2032 CAGR : 20.30%



Others (Others (Tips/Donations, Training, etc.)

2025-2032 CAGR : 17.50%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.1.4 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

Application	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Lifestyle	5,667.1	6,196.1	6,992.5	8,108.2	9,586.4	11,742.6	14,582.1	18,330.4	23,362.6	30,143.2	39,251.9	51,431.3	67,666.8	**28.4%**
Beauty & Fashion	2,328.6	2,599.0	2,994.0	3,543.9	4,277.2	5,348.8	6,781.1	8,702.4	11,323.3	14,915.1	19,828.2	26,523.7	35,626.5	**31.1%**
Health and Wellness	1,018.2	1,085.1	1,193.6	1,349.0	1,554.7	1,856.1	2,246.7	2,752.8	3,419.8	4,300.9	5,459.2	6,972.5	8,942.5	**25.2%**
Travel and Adventure	1,542.7	1,678.6	1,885.2	2,175.4	2,559.6	3,120.2	3,855.9	4,823.7	6,118.1	7,855.6	10,179.7	13,273.6	17,378.3	**27.8%**
Others (Food and Culinary, Home Decor, etc.)	777.5	833.5	919.7	1,039.9	1,195.0	1,417.5	1,698.4	2,051.6	2,501.3	3,071.6	3,784.8	4,661.5	5,719.6	**22.1%**
Art & Design	1,973.5	2,120.6	2,351.8	2,680.0	3,113.8	3,748.8	4,575.3	5,652.3	7,080.0	8,977.2	11,488.1	14,792.6	19,125.2	**26.2%**
Music	2,640.9	2,740.7	2,935.5	3,230.5	3,624.6	4,212.9	4,964.1	5,920.9	7,160.2	8,765.3	10,829.4	13,462.6	16,805.1	**21.9%**
Sports	2,367.3	2,423.4	2,560.6	2,779.8	3,077.0	3,529.2	4,103.6	4,829.9	5,763.8	6,963.0	8,489.4	10,414.8	12,829.4	**20.2%**
Gaming	3,964.6	4,204.7	4,602.7	5,176.9	5,936.8	7,054.0	8,496.7	10,360.0	12,807.4	16,027.8	20,243.4	25,726.8	32,830.2	**24.6%**
Others (Education and Learning, Cosplay, business, etc.)	1,474.0	1,575.6	1,727.1	1,932.7	2,190.7	2,555.7	3,000.2	3,536.8	4,189.6	4,973.3	5,888.0	6,915.4	8,012.9	**17.7%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

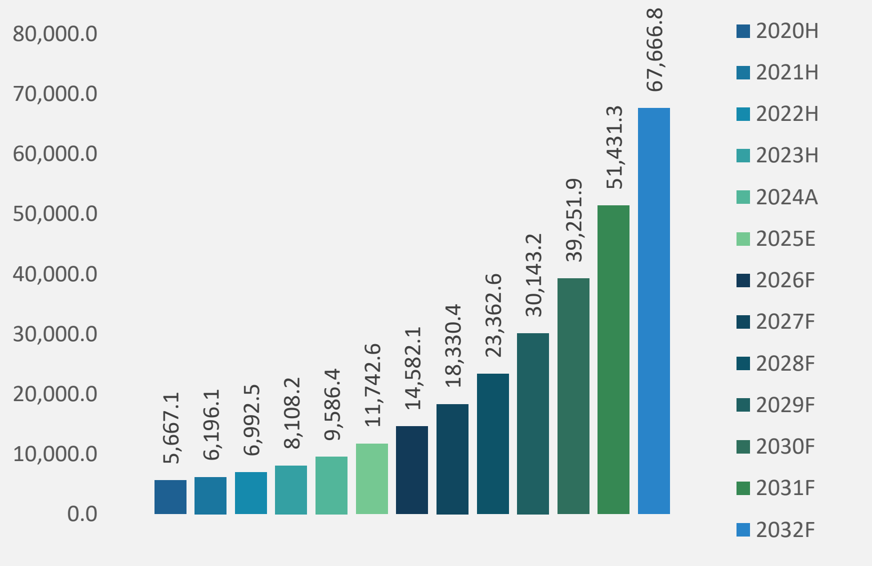
EUROPE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.1.4.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

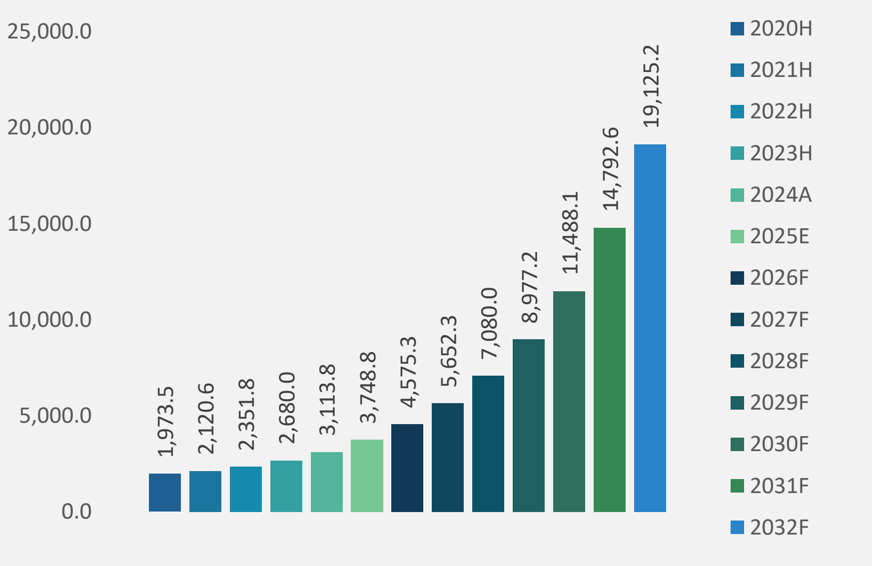
Lifestyle

2025-2032 CAGR : 28.40%



Art & Design

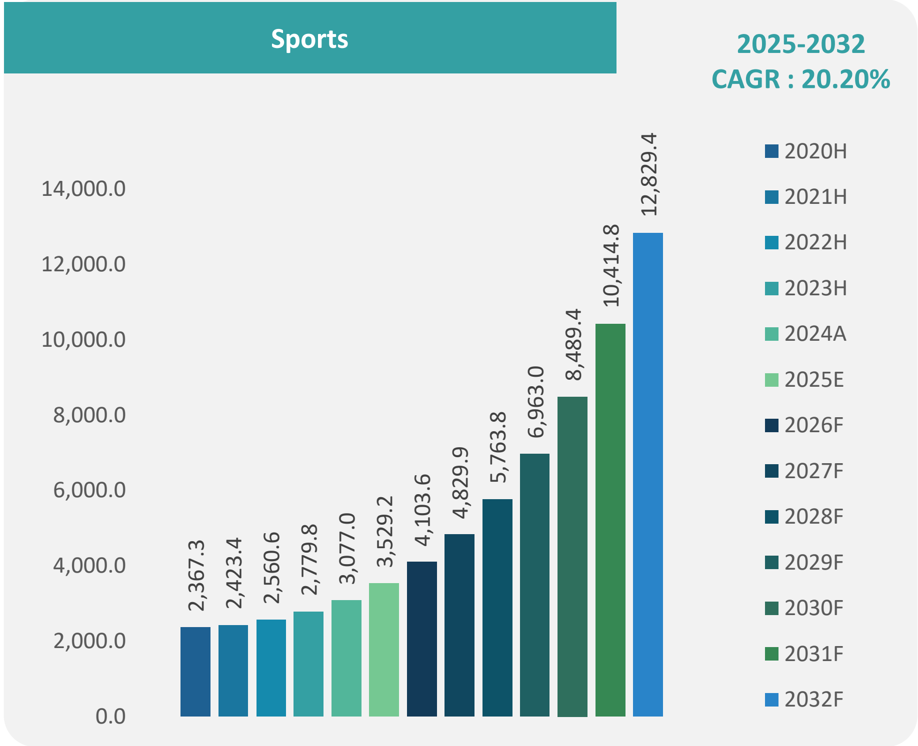
2025-2032 CAGR : 26.20%

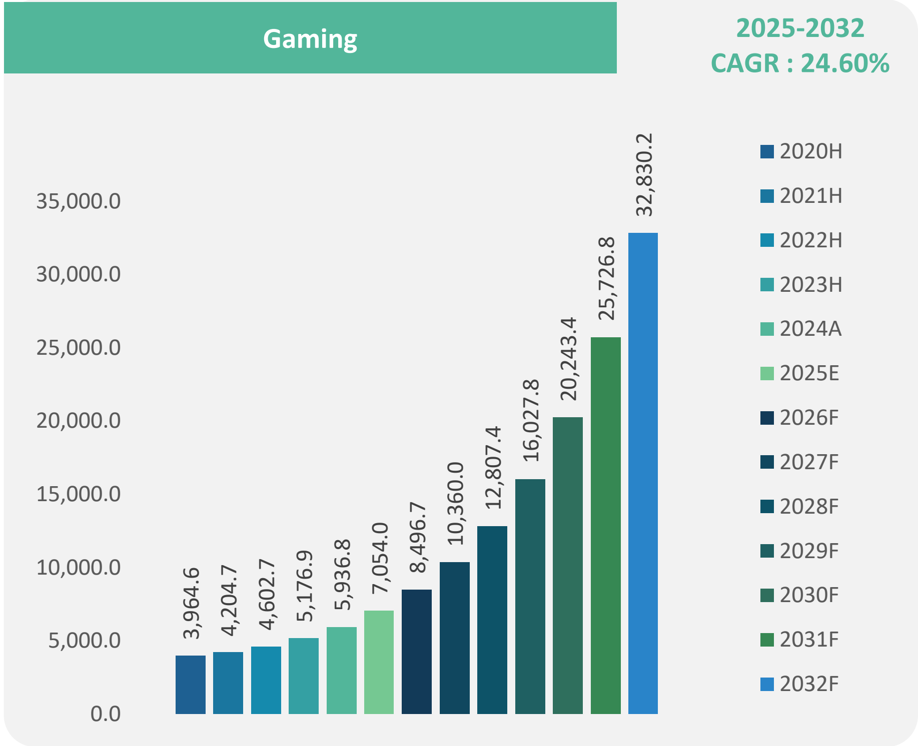


COHERENT MARKET INSIGHTS

TABLE 4.1.4.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032





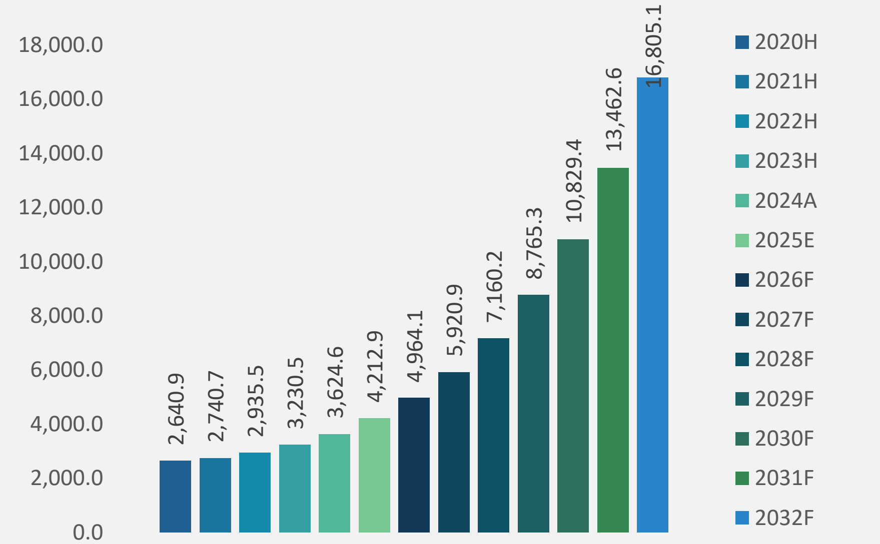
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.1.4.B Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

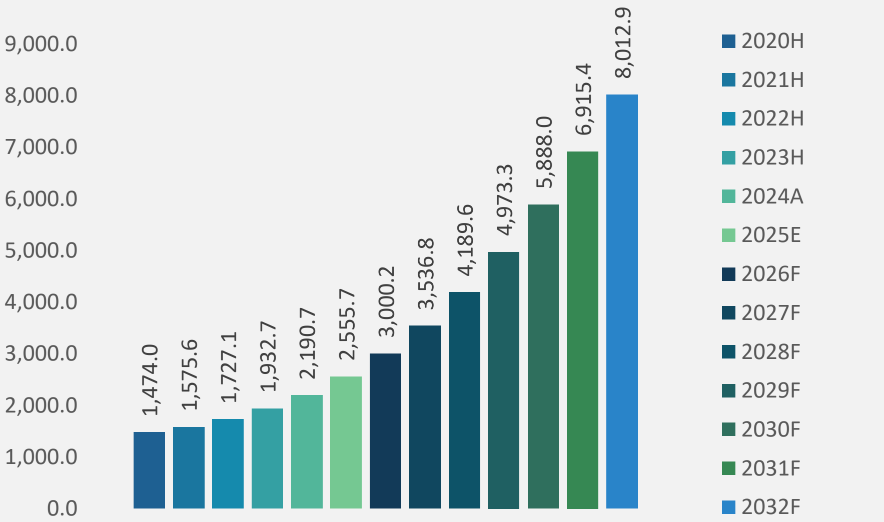
Music

2025-2032 CAGR : 21.90%



Others (Education and Learning, Cosplay, business, etc.)

2025-2032 CAGR : 17.70%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY END USER

TABLE 4.1.5

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, End User, 2020-2032

End User	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Amateur Creator	13,334.2	14,112.0	15,415.2	17,301.7	19,800.3	23,479.3	28,225.1	34,345.9	42,374.7	52,923.7	66,709.7	84,609.6	107,737.0	**24.3%**
Professional Creator	4,753.2	5,149.1	5,754.9	6,606.3	7,729.1	9,363.8	11,496.9	14,284.4	17,988.9	22,926.2	29,480.5	38,133.9	49,532.7	**26.9%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

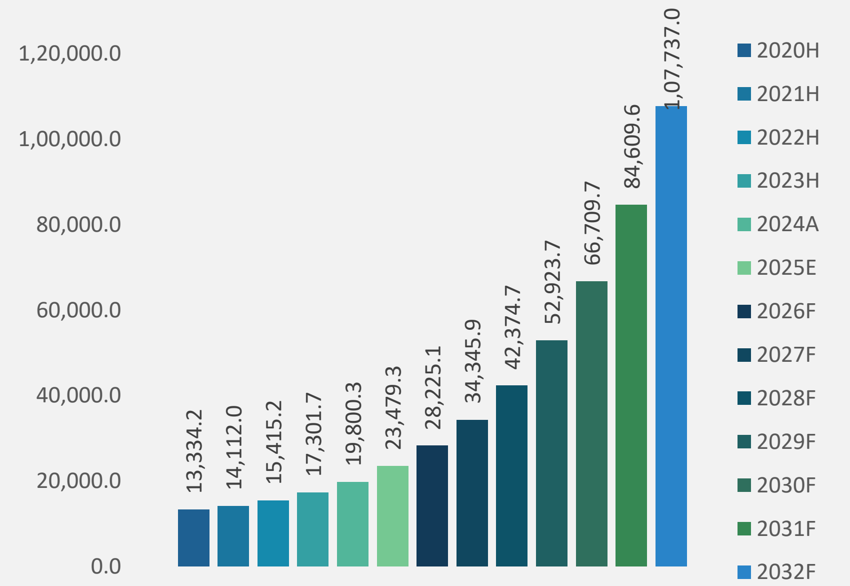
EUROPE CREATOR ECONOMY MARKET, BY END USER

TABLE 4.1.5.A

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, End User, 2020-2032

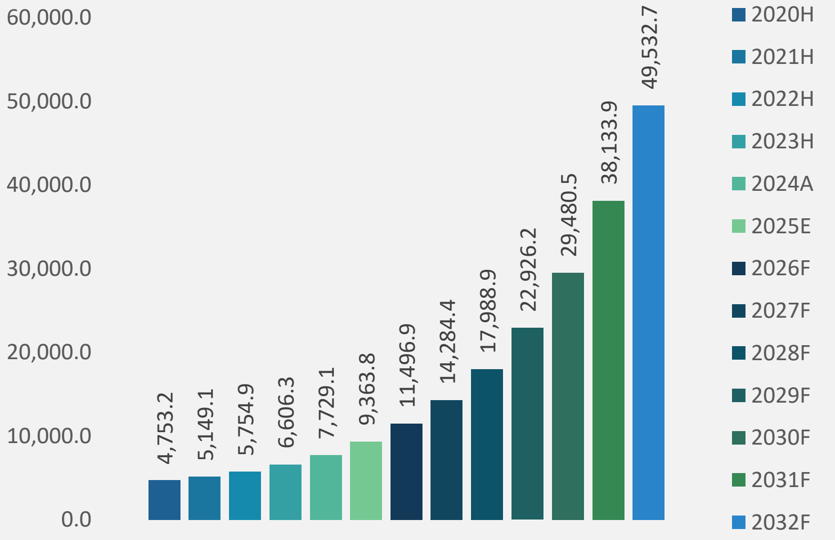
Amateur Creator

2025-2032
CAGR : 24.30%



Professional Creator

2025-2032
CAGR : 26.90%



EUROPE CREATOR ECONOMY MARKET, BY CONTENT TYPE

TABLE 4.1.6 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032

Content Type	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Video Content	10,973.5	11,779.1	13,050.2	14,856.0	17,243.1	20,735.3	25,278.0	31,193.7	39,028.6	49,432.5	63,188.5	81,275.0	104,944.8	**26.1%**
Audio Content	2,266.4	2,371.7	2,561.6	2,842.8	3,217.0	3,772.9	4,485.9	5,398.8	6,587.8	8,137.4	10,144.4	12,724.8	16,004.8	**22.9%**
Written Content	3,347.8	3,543.7	3,871.5	4,345.9	4,974.3	5,899.3	7,092.6	8,631.7	10,650.8	13,303.8	16,771.3	21,273.9	27,091.5	**24.3%**
Others (Visual Art and Design, etc.)	1,499.7	1,566.7	1,686.8	1,863.3	2,095.1	2,435.7	2,865.5	3,406.1	4,096.4	4,976.2	6,086.0	7,469.9	9,228.6	**21.0%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

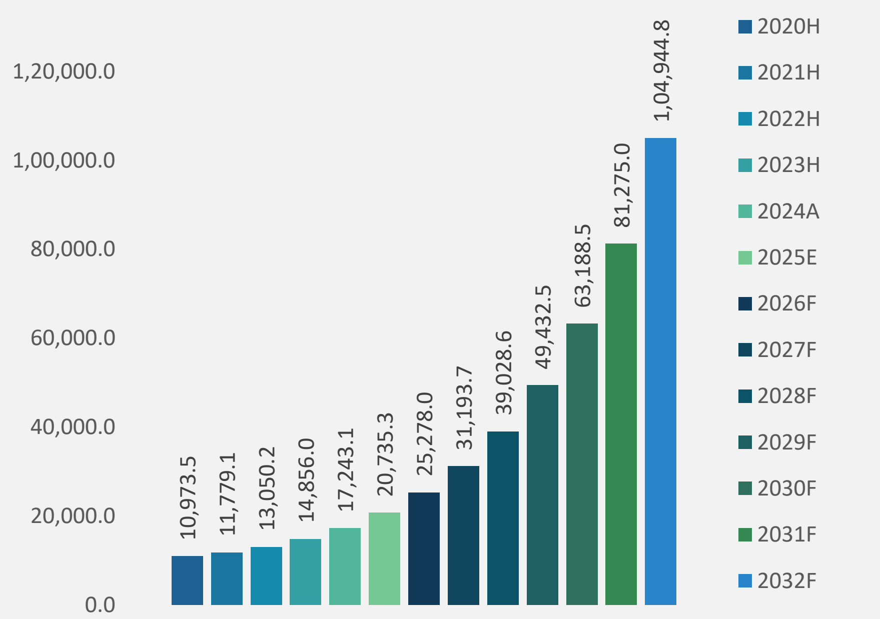
EUROPE CREATOR ECONOMY MARKET, BY CONTENT TYPE

TABLE 4.1.6

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032

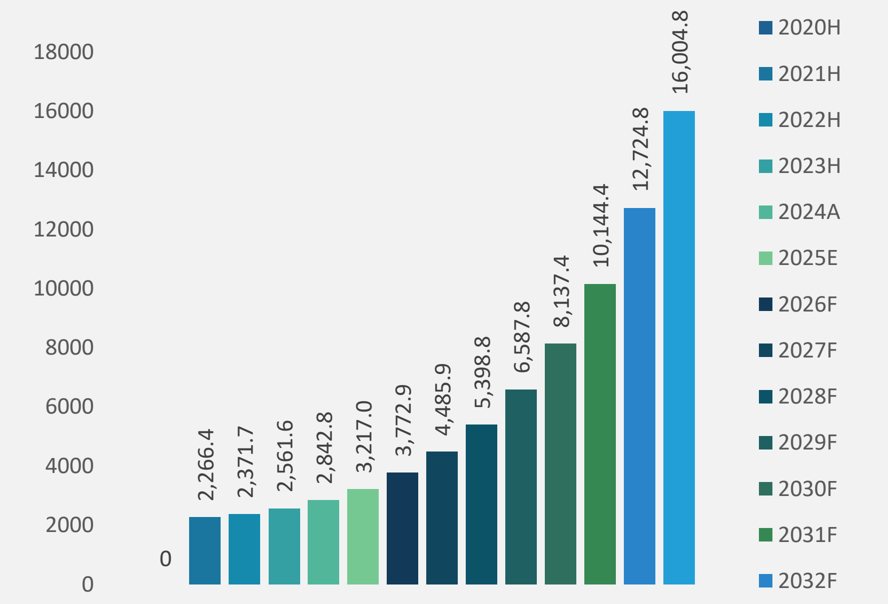
Video Content

2025-2032 CAGR : 26.10%



Audio Content

2025-2032 CAGR : 22.90%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

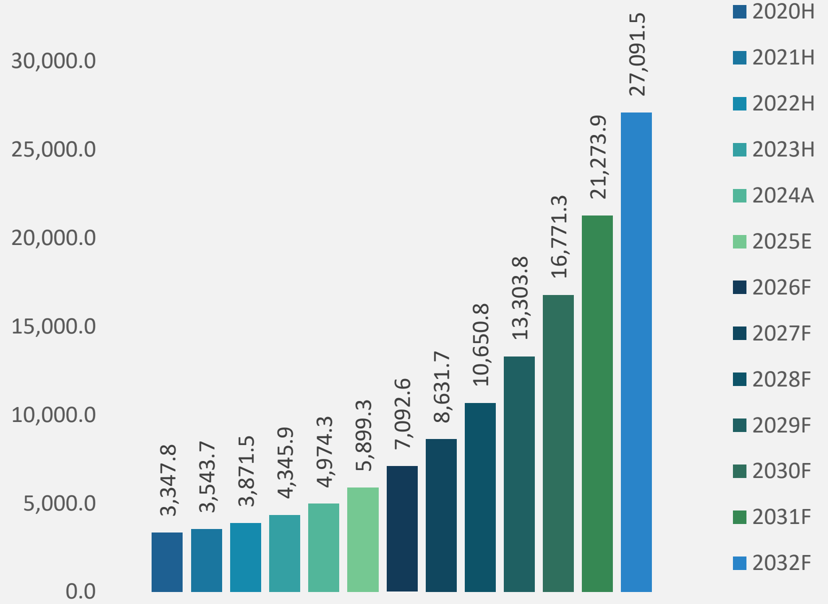
EUROPE CREATOR ECONOMY MARKET, BY CONTENT TYPE

TABLE 4.1.6

Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032

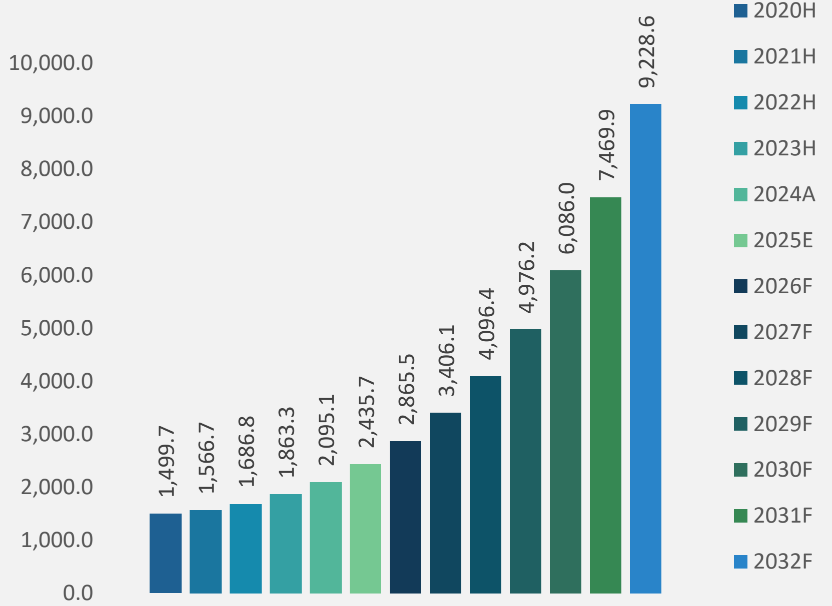
Written Content

2025-2032 CAGR : 24.30%



Others (Visual Art and Design, etc.)

2025-2032 CAGR : 21.00%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

TABLE 4.1.7 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032

Creator Economy Entities	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Content Creators	7,476.9	8,029.3	8,899.9	10,136.2	11,771.3	14,165.2	17,280.8	21,340.3	26,719.8	33,867.5	43,324.5	55,767.1	72,079.5	**26.2%**
Platforms & Social Media	5,839.0	6,214.1	6,825.7	7,703.4	8,864.3	10,567.2	12,770.5	15,622.2	19,376.0	24,327.3	30,826.0	39,303.2	50,317.0	**25.0%**
Tools & SaaS Providers	3,030.1	3,161.8	3,405.1	3,767.8	4,250.5	4,966.7	5,883.3	7,054.3	8,575.8	10,553.6	13,107.5	16,380.3	20,554.3	**22.5%**
Agencies & Creator Services	1,741.5	1,855.9	2,039.5	2,300.5	2,643.3	3,144.1	3,787.4	4,613.5	5,691.9	7,101.4	8,932.3	11,292.9	14,318.8	**24.2%**
Total	**18,087.4**	**19,261.2**	**21,170.1**	**23,908.0**	**27,529.4**	**32,843.1**	**39,722.0**	**48,630.3**	**60,363.6**	**75,849.9**	**96,190.2**	**122,743.5**	**157,269.7**	**25.1%**

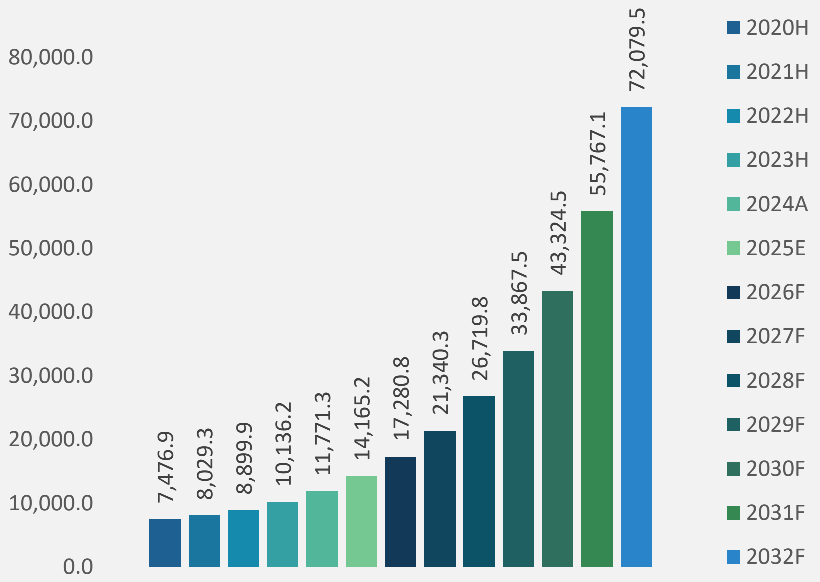
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

TABLE 4.1.7 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032

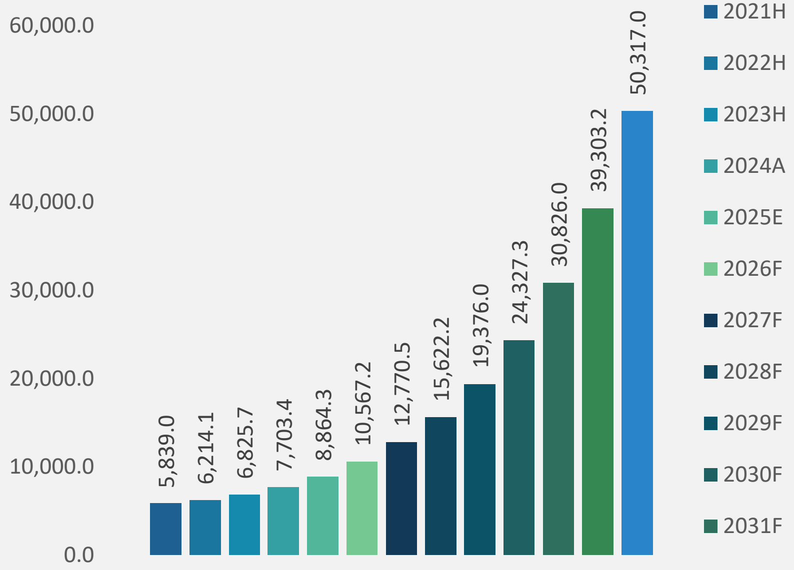
Content Creators

2025-2032 CAGR : 26.20%



Platforms & Social Media

2025-2032 CAGR : 25.00%

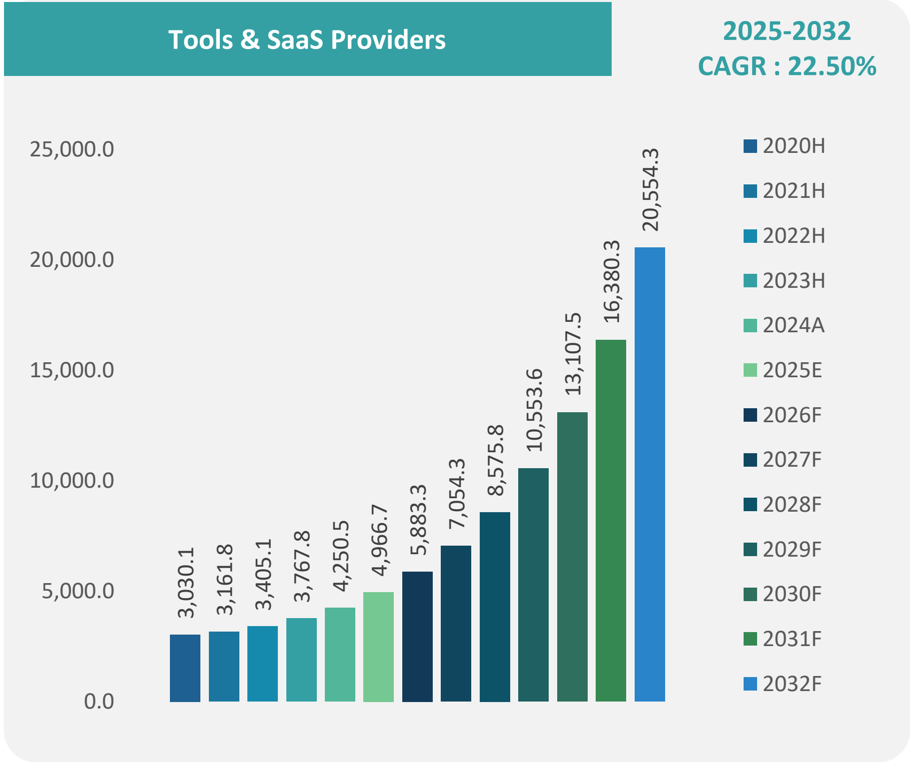


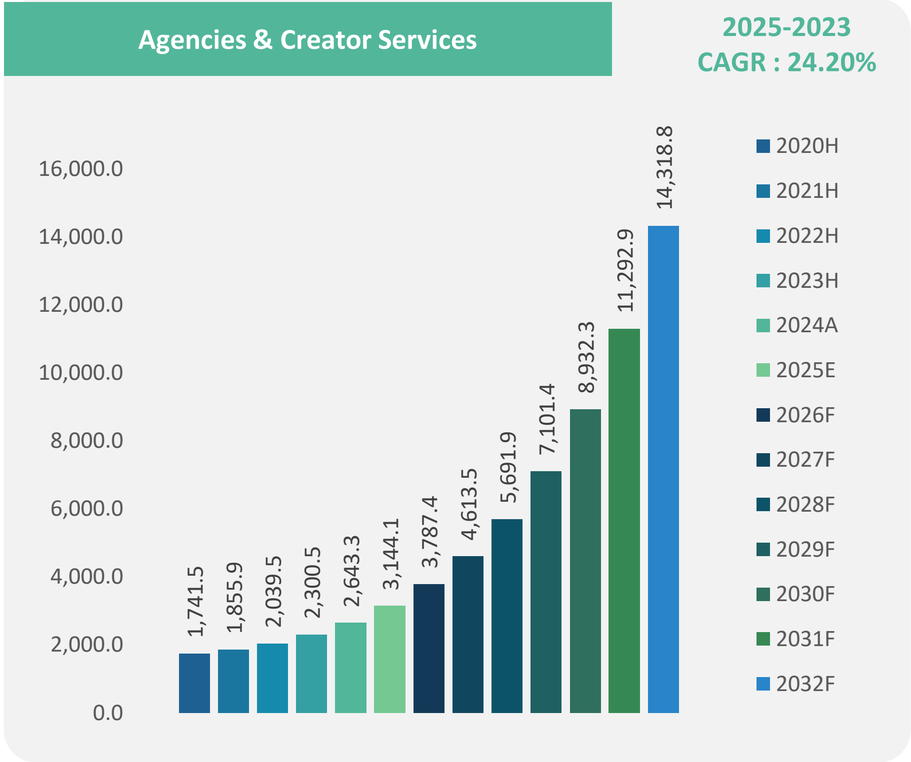
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

EUROPE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

COHERENT MARKET INSIGHTS

TABLE 4.1.7 Europe Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032





SECTION 4.2
FRANCE CREATOR ECONOMY MARKET

Market Size and Forecast

FRANCE CREATOR ECONOMY MARKET, BY PLATFORM TYPE

TABLE 4.2.1 France Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

Platform Type	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Social Media Platforms	1,970.6	2,099.7	2,309.2	2,609.4	3,013.0	3,631.3	4,436.0	5,484.5	6,874.0	8,720.3	11,163.3	14,377.4	18,583.2	**26.3%**
Video Sharing Platforms	1,226.0	1,292.6	1,406.7	1,572.9	1,797.1	2,143.2	2,599.5	3,191.1	3,971.4	5,002.5	6,358.9	8,132.3	10,453.3	**25.4%**
Podcasting Platforms	470.0	491.5	530.5	588.3	666.7	788.7	945.6	1,147.4	1,411.4	1,757.2	2,207.8	2,790.7	3,535.5	**23.9%**
Live Streaming Platforms	656.2	676.9	720.7	788.4	881.3	1,028.4	1,216.2	1,455.8	1,766.5	2,169.6	2,688.9	3,352.7	4,161.3	**22.1%**
eCommerce Platform	221.3	227.4	241.3	263.0	293.0	340.6	401.4	478.7	578.8	708.3	874.6	1,086.6	1,339.7	**21.6%**
Others (Crowdfunding Platforms,	124.5	132.1	143.8	160.0	181.0	212.4	242.4	277.1	317.3	362.5	410.4	456.5	517.7	**13.6%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

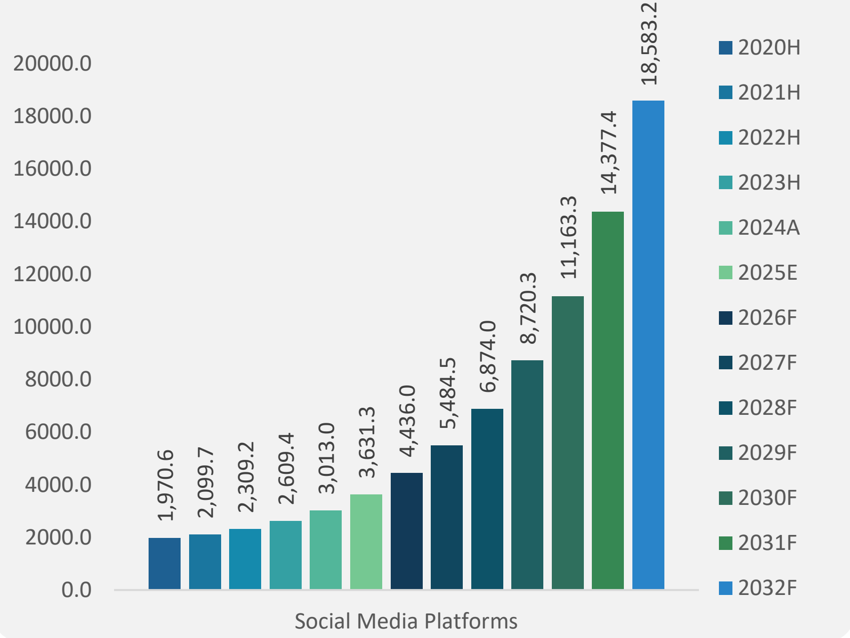
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

TABLE 4.2.1.A

France Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

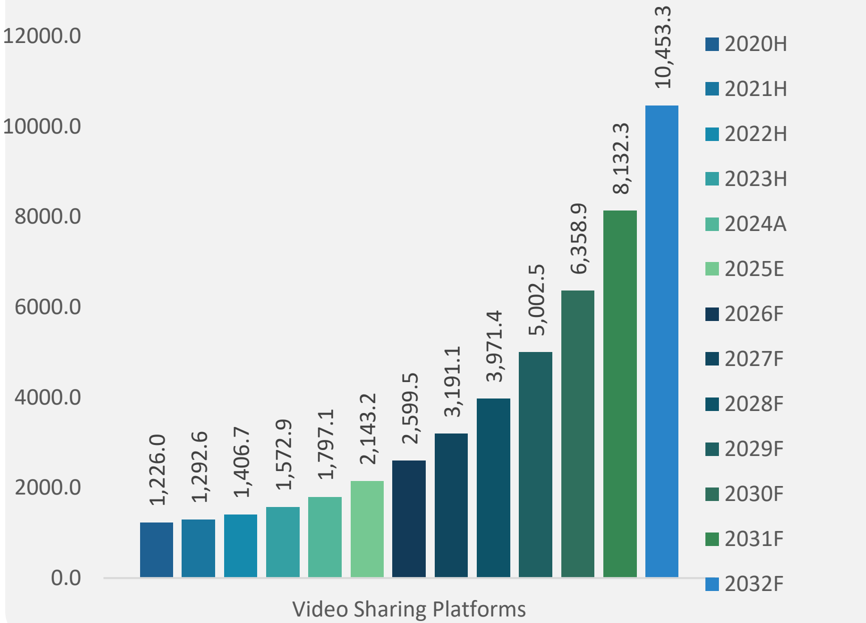
Social Media Platforms

2025-2032 CAGR : 26.3%



Video Sharing Platforms

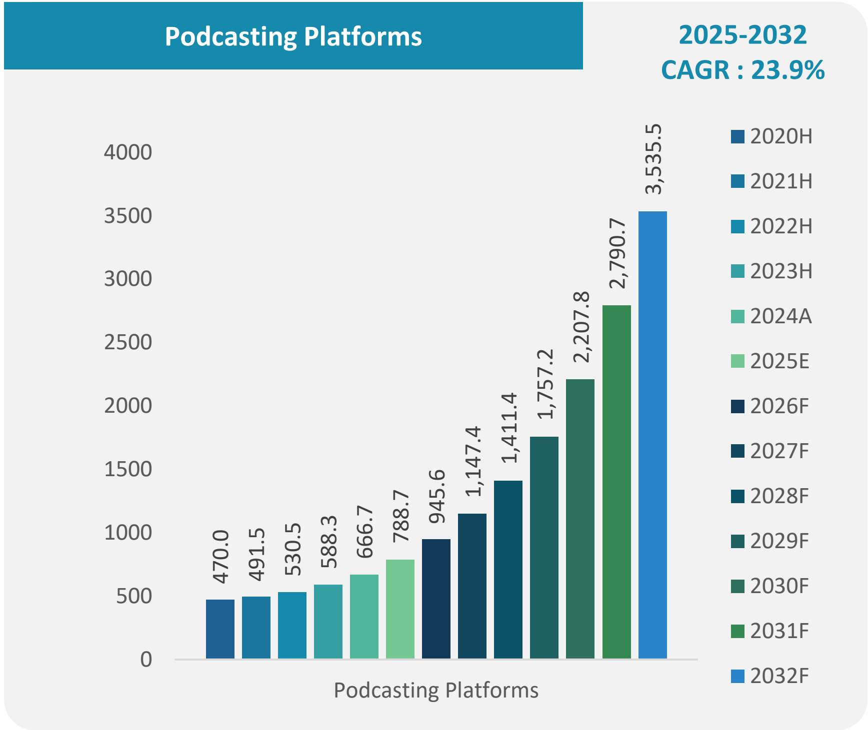
2025-2032 CAGR : 25.4%

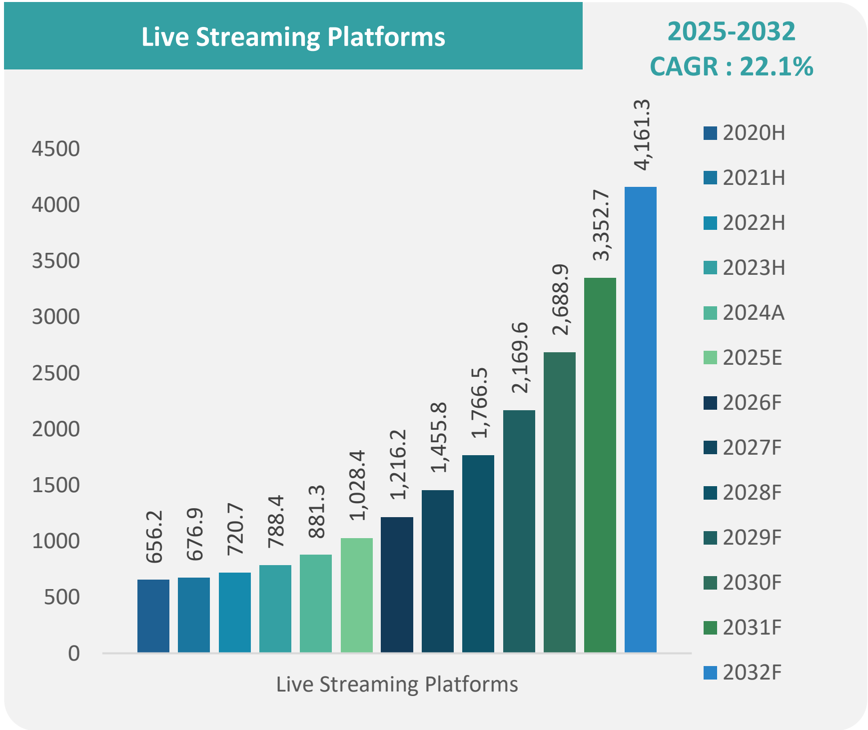


Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY PLATFORM TYPE

TABLE 4.2.1.B France Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032





Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

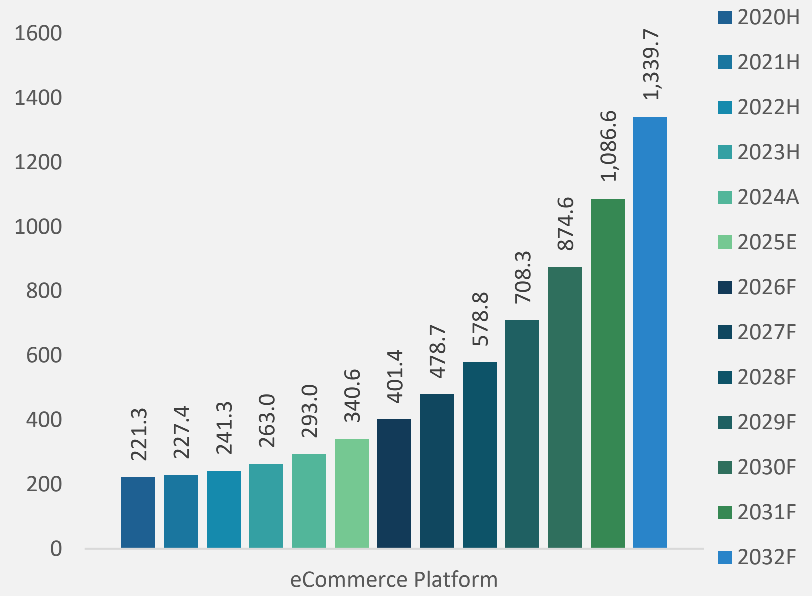
COHERENT MARKET INSIGHTS

TABLE 4.2.1.C

France Creator Economy Market Value (US$ million) Analysis and Forecast, Platform Type, 2020-2032

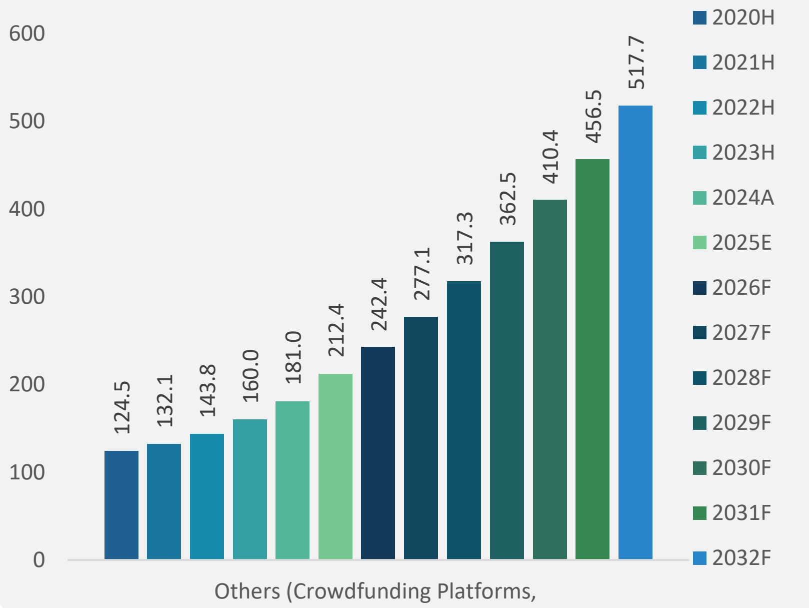
eCommerce Platform

2025-2032 CAGR : 21.6%



Others (Crowdfunding Platforms)

2025-2032 CAGR : 13.6%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.2.2 France Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

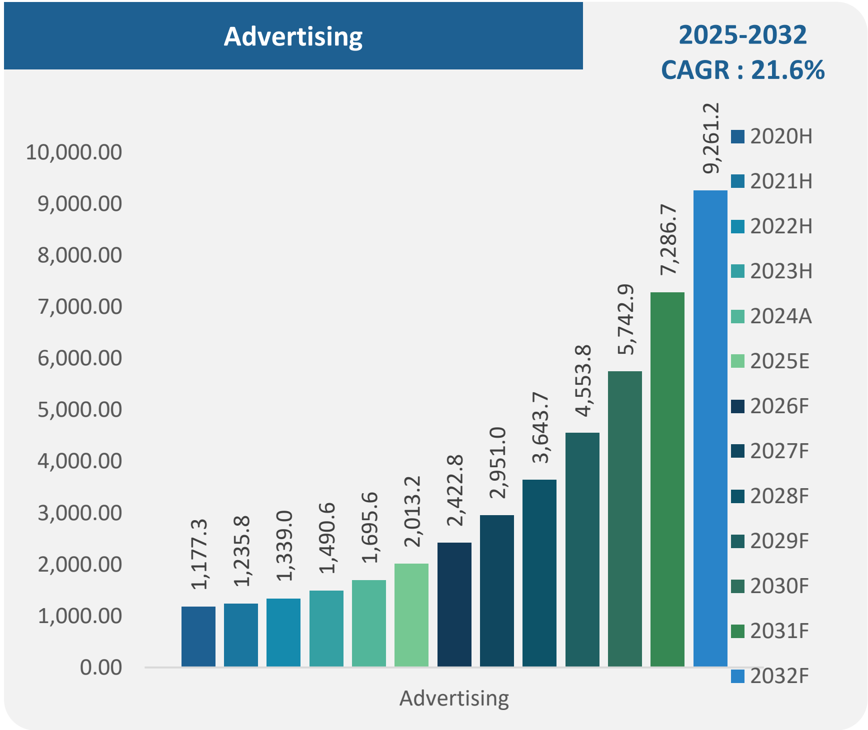
Revenue Model	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Advertising	1,177.3	1,235.8	1,339.0	1,490.6	1,695.6	2,013.2	2,422.8	2,951.0	3,643.7	4,553.8	5,742.9	7,286.7	9,261.2	**24.4%**
Paid Subscriptions	753.5	785.4	845.0	934.0	1,055.0	1,243.8	1,486.4	1,797.7	2,204.1	2,735.3	3,425.3	4,315.5	5,482.4	**23.6%**
Side Businesses	257.1	260.4	272.2	292.3	320.9	367.6	426.8	501.6	597.6	720.6	876.9	1,073.5	1,318.2	**20.0%**
Merchandise	417.1	426.4	449.9	487.7	540.3	624.8	732.3	868.7	1,044.6	1,271.4	1,561.6	1,929.6	2,352.8	**20.9%**
Sponsorships and Partnerships	1,929.1	2,067.6	2,287.4	2,600.0	3,020.0	3,661.3	4,499.2	5,595.6	7,054.8	9,002.7	11,593.0	15,019.4	19,443.6	**26.9%**
Others (Others (Tips/Donations, Training, etc.)	134.4	144.6	158.8	177.3	200.3	233.8	273.5	320.0	374.5	436.6	504.1	571.7	732.6	**17.7%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

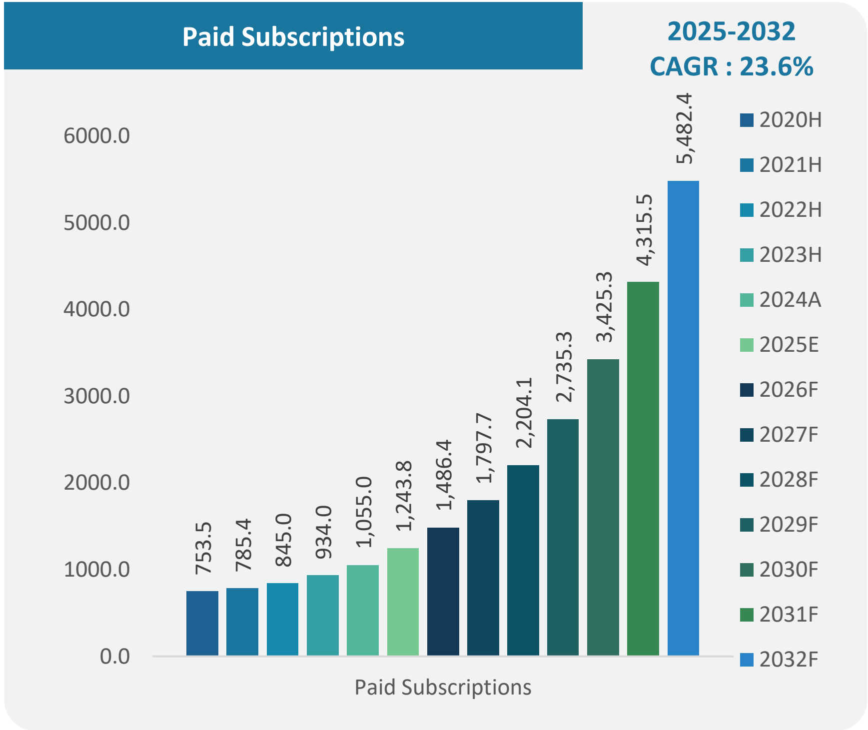
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.2.2.A

France Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

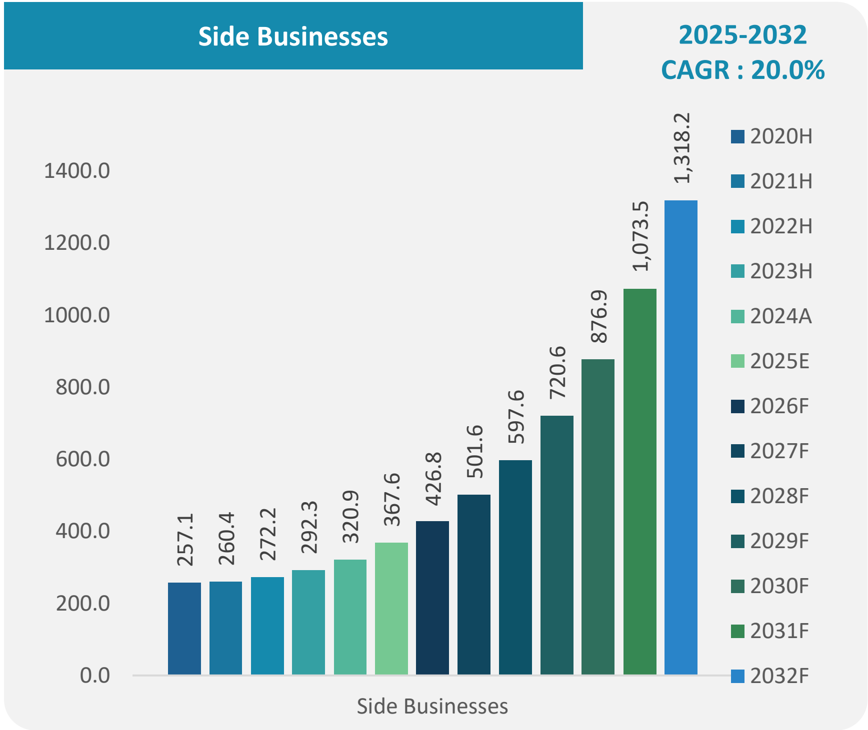


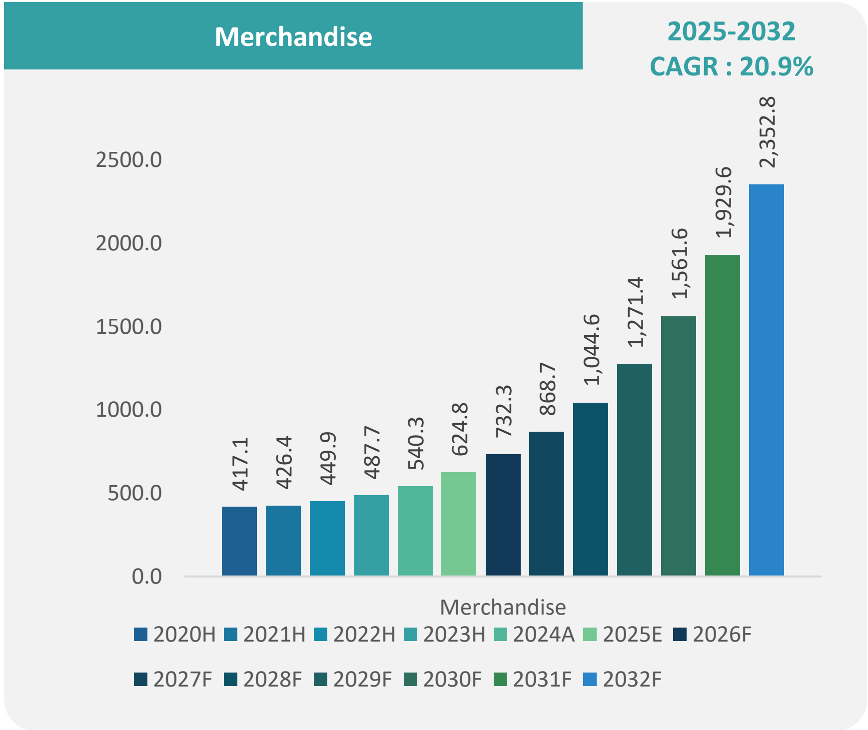


Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY REVENUE MODEL

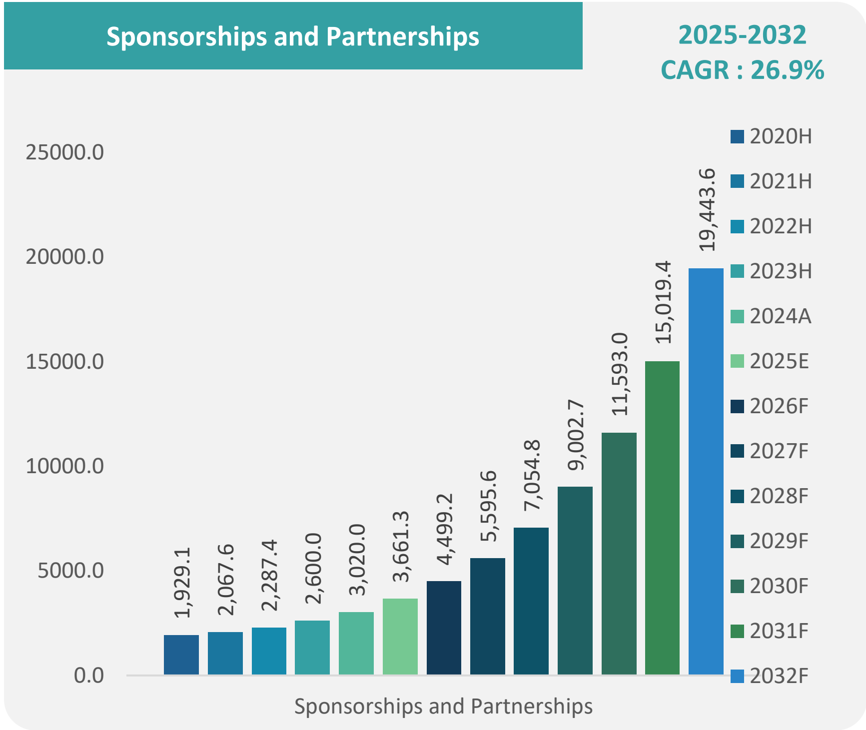
TABLE 4.2.2.B France Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032

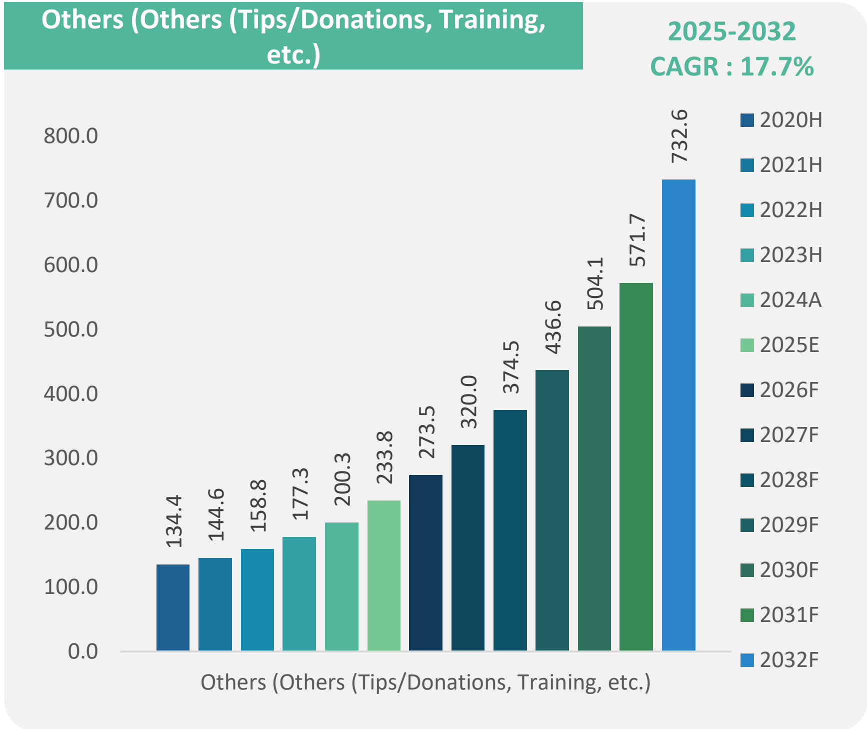




FRANCE CREATOR ECONOMY MARKET, BY REVENUE MODEL

TABLE 4.2.2.C France Creator Economy Market Value (US$ million) Analysis and Forecast, Revenue Model, 2020-2032





Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.2.3 France Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

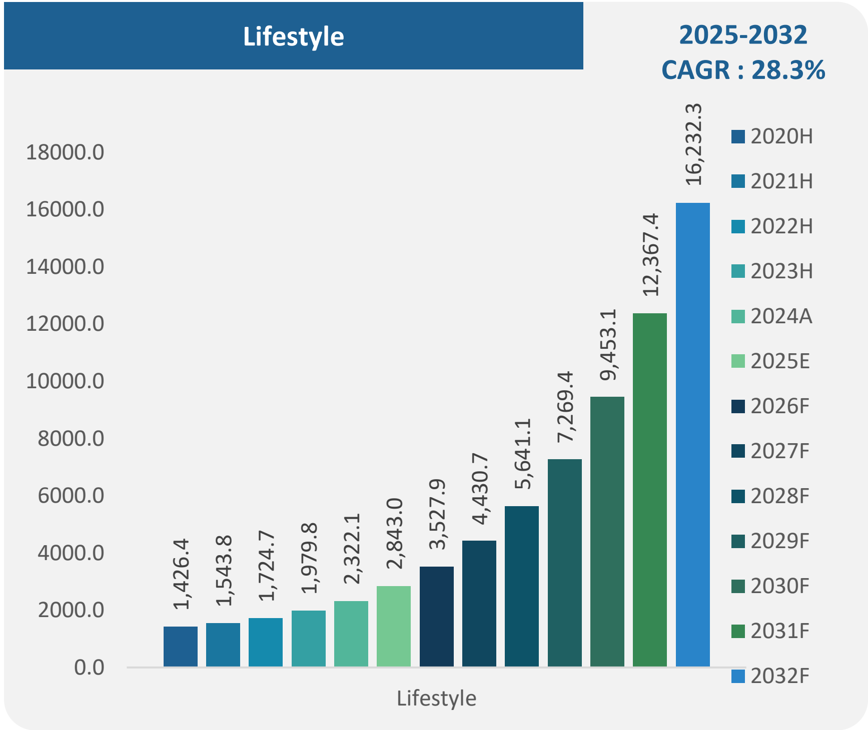
Application	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Lifestyle	1,426.4	1,543.8	1,724.7	1,979.8	2,322.1	2,843.0	3,527.9	4,430.7	5,641.1	7,269.4	9,453.1	12,367.4	16,232.3	**28.3%**
Beauty & Fashion	606.3	670.0	764.2	895.6	1,072.6	1,340.7	1,698.7	2,178.2	2,831.5	3,725.4	4,946.2	6,607.0	8,853.8	**31.0%**
Health and Wellness	251.2	265.1	288.8	323.2	369.6	441.2	533.8	653.7	811.4	1,019.5	1,292.6	1,648.8	2,110.0	**25.1%**
Travel and Adventure	393.4	423.7	470.9	537.9	627.7	764.7	944.2	1,179.9	1,494.7	1,916.5	2,479.7	3,228.0	4,215.6	**27.6%**
Others (Food and Culinary, Home Decor, etc.)	175.5	185.1	200.8	223.0	252.2	296.3	351.2	419.0	503.5	608.0	734.5	883.6	1,052.9	**19.9%**
Art & Design	525.4	558.7	613.2	691.5	796.9	958.5	1,168.6	1,442.0	1,803.7	2,283.6	2,917.5	3,750.1	4,835.7	**26.0%**
Music	640.4	658.7	699.3	762.9	850.4	989.4	1,166.8	1,392.6	1,685.0	2,063.5	2,550.1	3,170.7	3,954.9	**21.9%**
Sports	626.1	636.7	668.4	720.9	794.5	914.0	1,065.7	1,257.6	1,504.5	1,821.8	2,226.0	2,736.4	3,374.8	**20.5%**
Gaming	1,022.1	1,072.9	1,162.4	1,294.0	1,472.0	1,747.7	2,103.3	2,561.8	3,163.2	3,953.2	4,985.6	6,325.7	8,051.9	**24.4%**
Others (Education and Learning, Cosplay, business, etc.)	428.3	449.4	484.2	533.0	596.3	692.0	808.8	949.8	1,121.8	1,328.8	1,571.5	1,846.0	2,141.2	**17.5%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

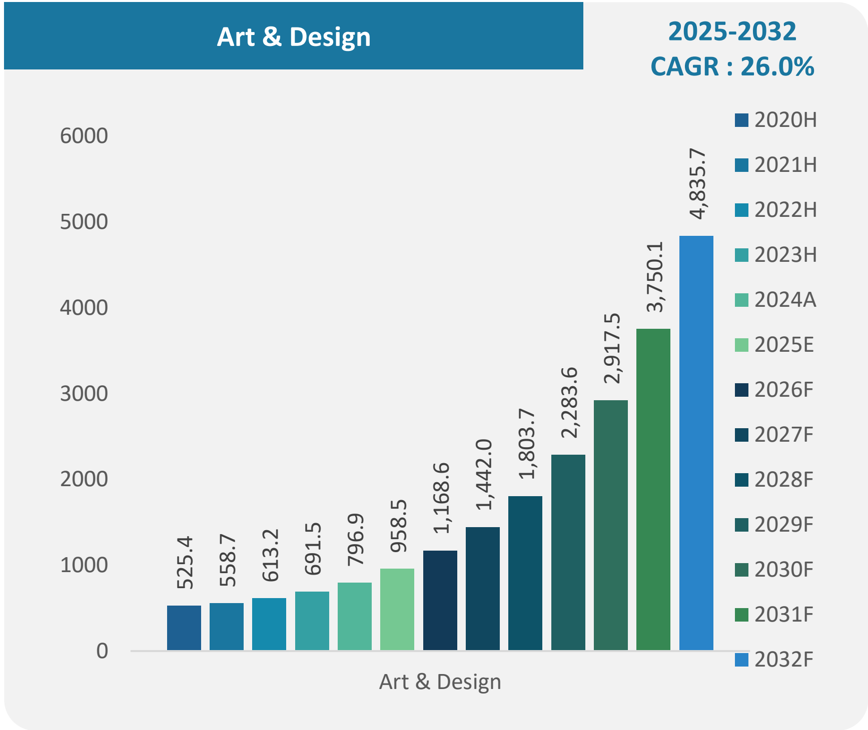
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY APPLICATION

COHERENT MARKET INSIGHTS

TABLE 4.2.3.A France Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032





Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

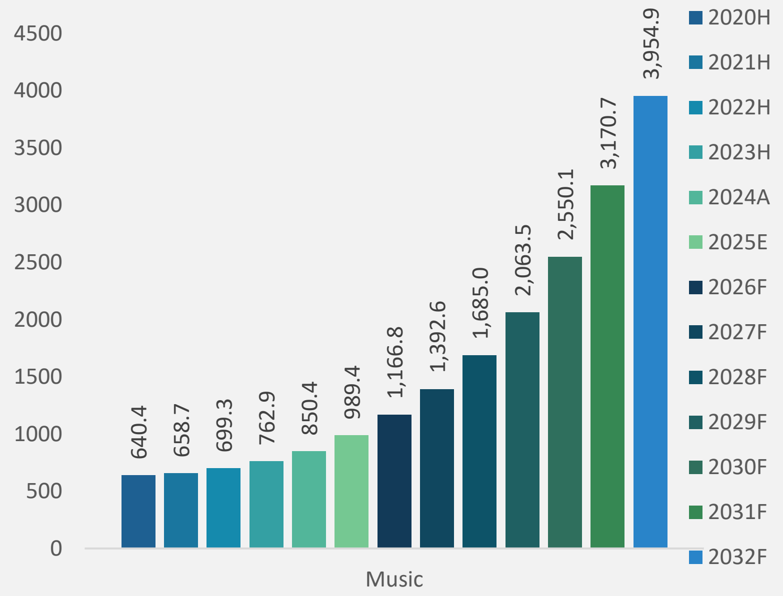
FRANCE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.2.3.B

France Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

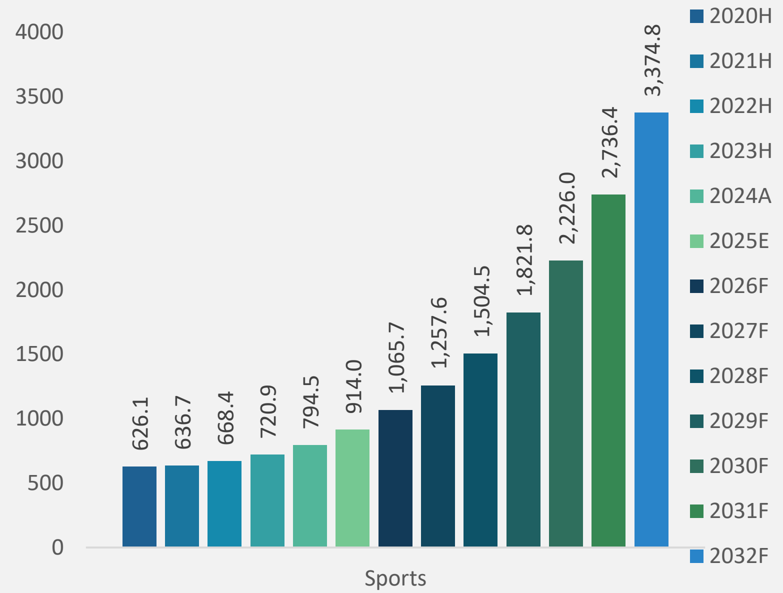
Music

2025-2032 CAGR : 21.9%



Sports

2025-2032 CAGR : 20.5%



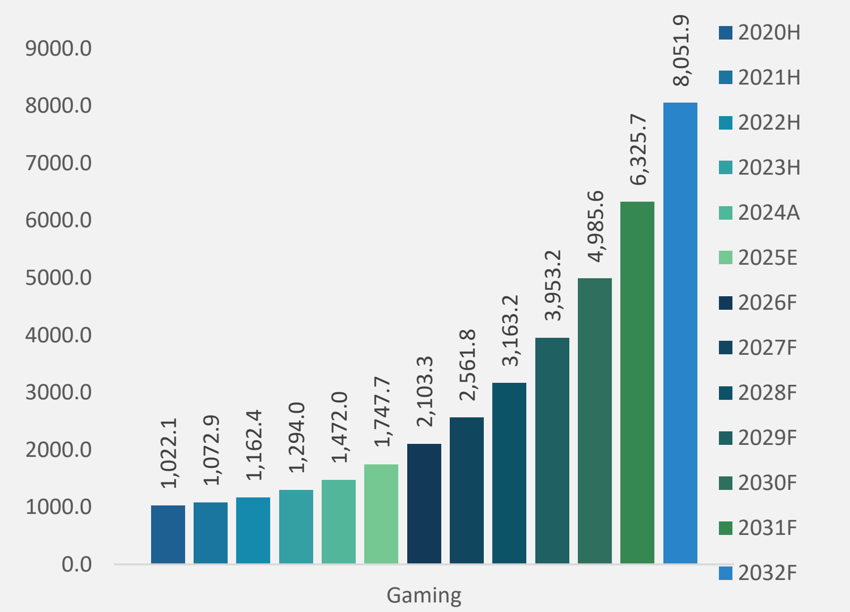
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY APPLICATION

TABLE 4.2.3.C France Creator Economy Market Value (US$ million) Analysis and Forecast, Application, 2020-2032

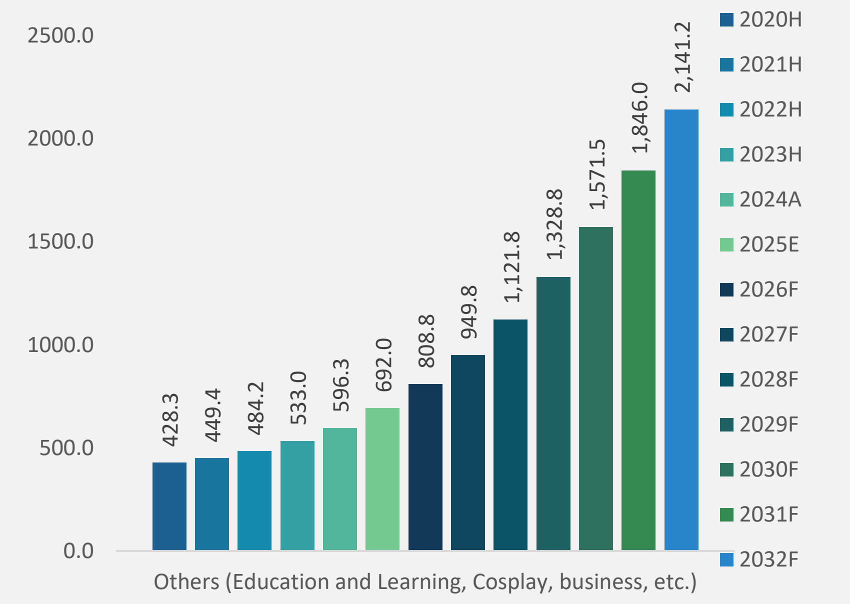
Gaming

2025-2032 CAGR : 24.4%



Others (Education and Learning, Cosplay, business, etc.)

2025-2032 CAGR : 17.5%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY END USER

TABLE 4.2.4 France Creator Economy Market Value (US$ million) Analysis and Forecast, End User, 2020-2032

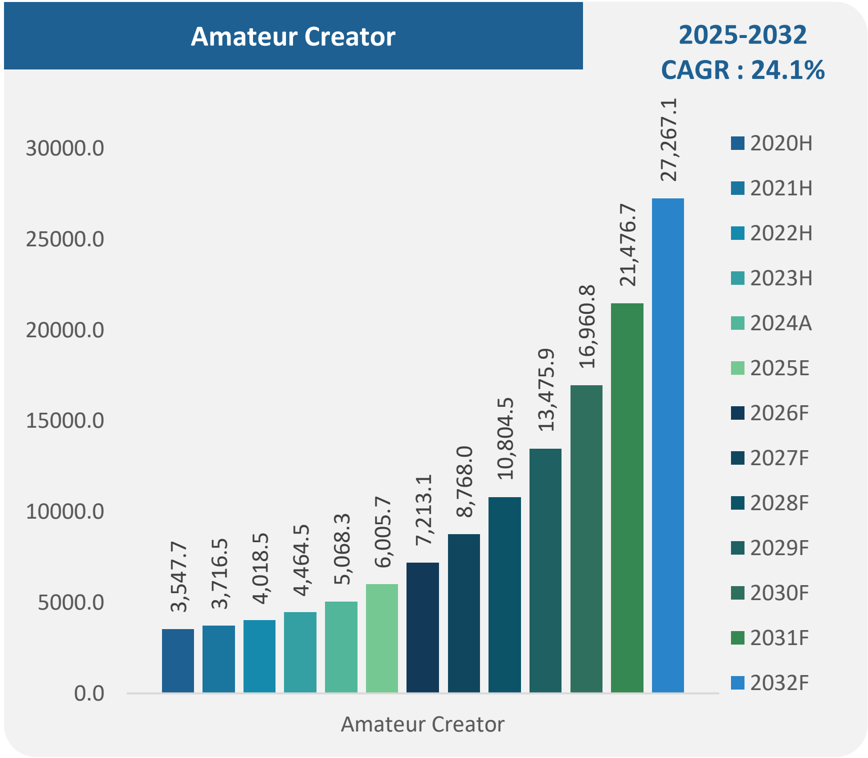
End User	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Amateur Creator	3,547.7	3,716.5	4,018.5	4,464.5	5,068.3	6,005.7	7,213.1	8,768.0	10,804.5	13,475.9	16,960.8	21,476.7	27,267.1	**24.1%**
Professional Creator	1,120.9	1,203.7	1,333.6	1,517.5	1,763.8	2,138.9	2,627.9	3,266.6	4,114.8	5,244.5	6,743.0	8,719.6	11,323.7	**26.9%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

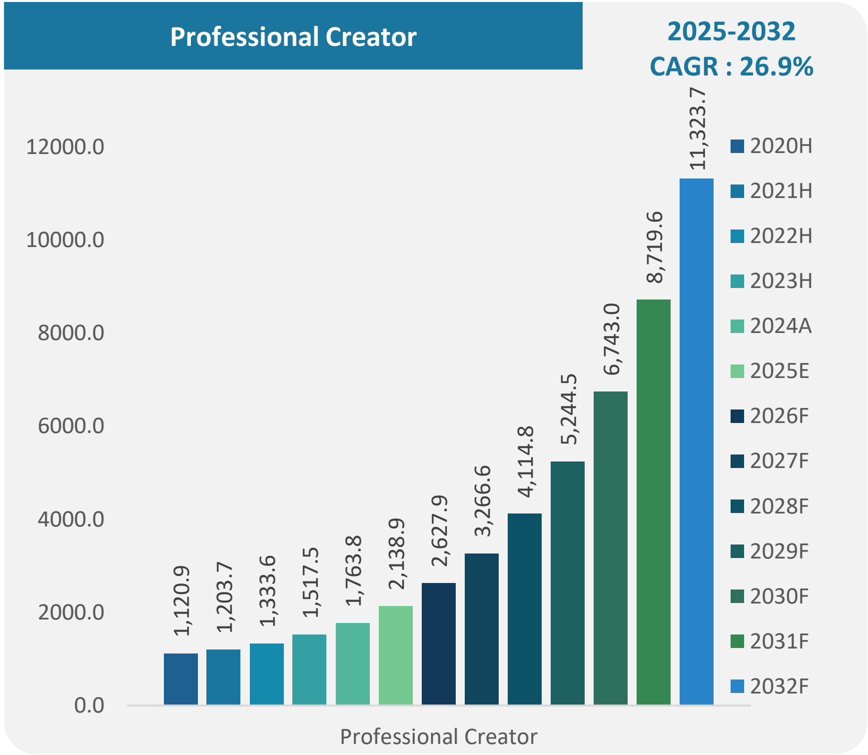
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY END USER

TABLE 4.2.4.A

France Creator Economy Market Value (US$ million) Analysis and Forecast, End User, 2020-2032





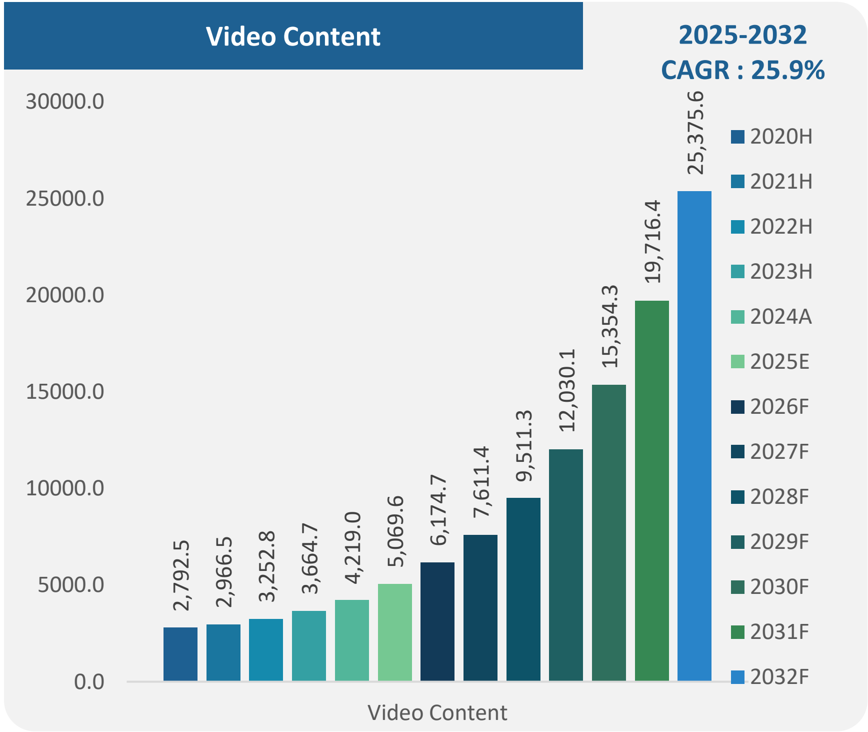
FRANCE CREATOR ECONOMY MARKET, BY CONTENT TYPE

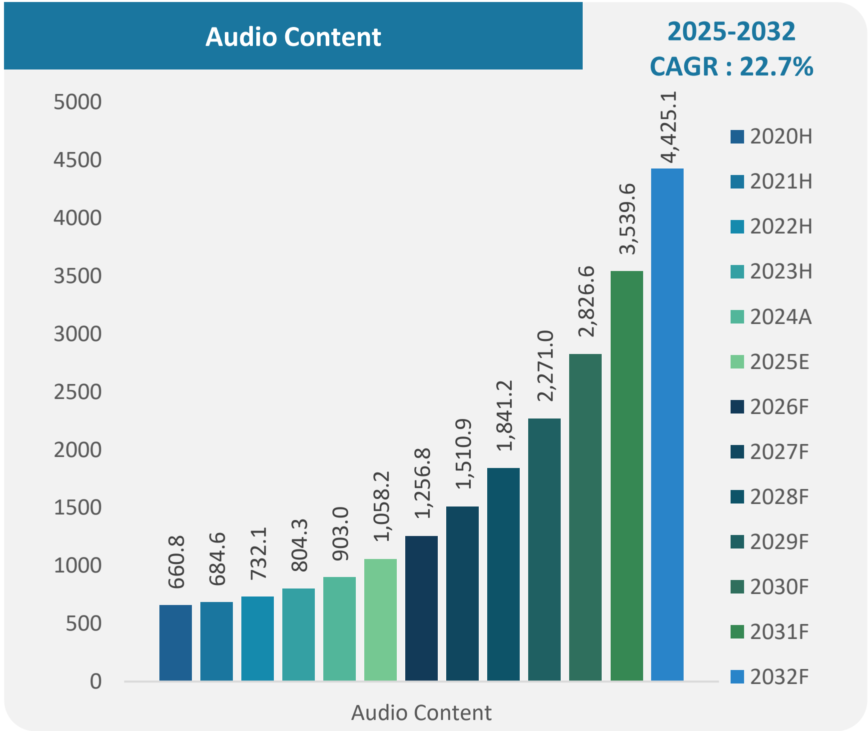
TABLE 4.2.5 France Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032

Content Type	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Video Content	2,792.5	2,966.5	3,252.8	3,664.7	4,219.0	5,069.6	6,174.7	7,611.4	9,511.3	12,030.1	15,354.3	19,716.4	25,375.6	**25.9%**
Audio Content	660.8	684.6	732.1	804.3	903.0	1,058.2	1,256.8	1,510.9	1,841.2	2,271.0	2,826.6	3,539.6	4,425.1	**22.7%**
Written Content	887.7	930.0	1,005.5	1,117.1	1,268.2	1,502.8	1,804.9	2,194.0	2,703.6	3,372.1	4,244.1	5,374.1	6,823.0	**24.1%**
Others (Visual Art and Design, etc.)	327.5	339.1	361.7	395.9	441.9	513.9	604.6	718.4	863.2	1,047.3	1,278.7	1,566.2	1,967.1	**21.1%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

FRANCE CREATOR ECONOMY MARKET, BY CONTENT TYPE

TABLE 4.2.5.A France Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032

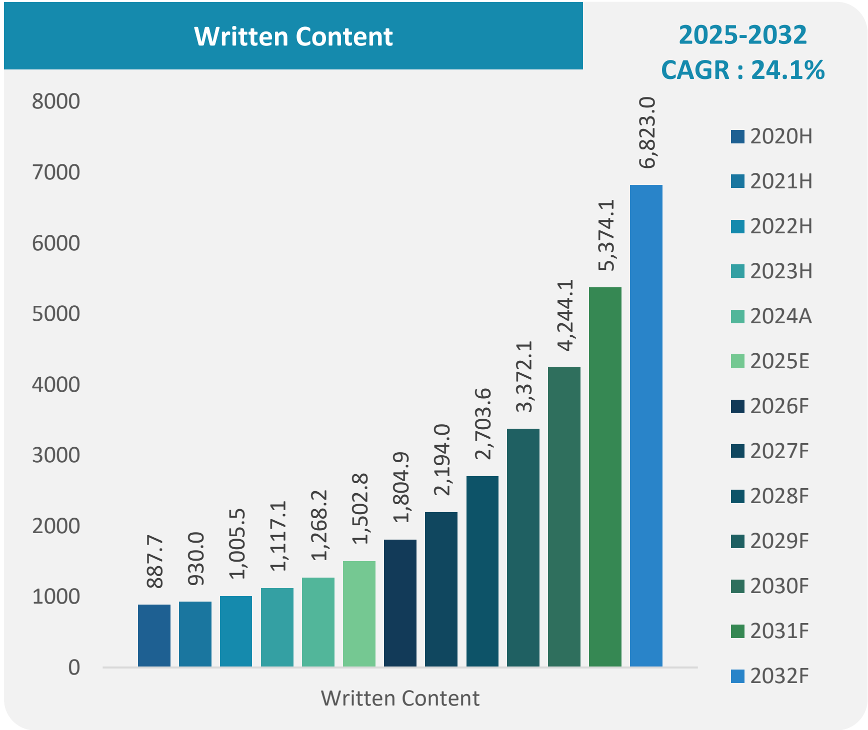


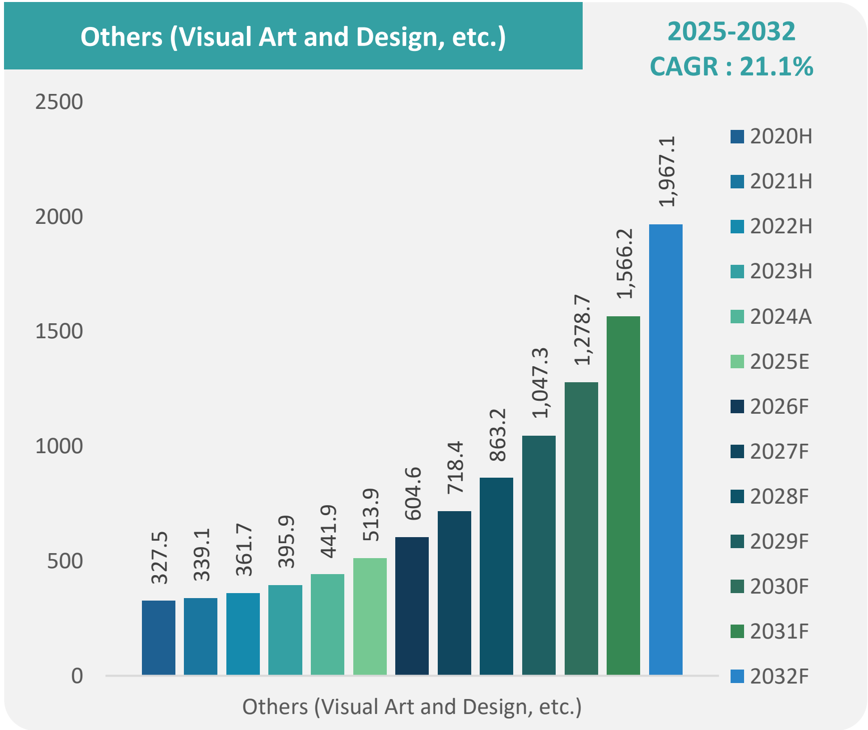


FRANCE CREATOR ECONOMY MARKET, BY CONTENT TYPE

TABLE 4.2.5

France Creator Economy Market Value (US$ million) Analysis and Forecast, Content Type, 2020-2032





FRANCE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

TABLE 4.2.6

France Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032

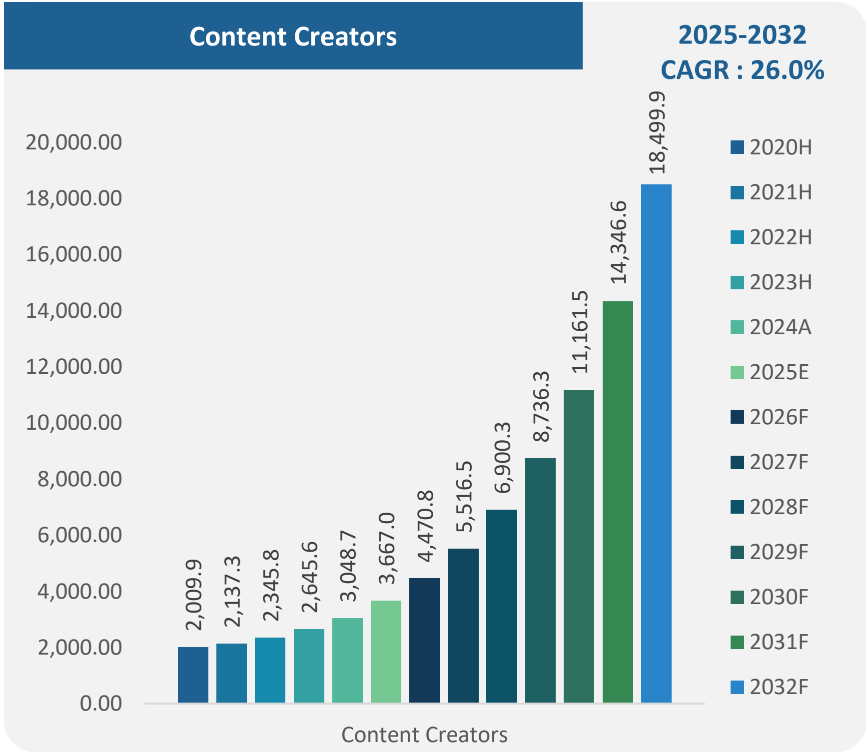
Creator Economy Entities	2020H	2021H	2022H	2023H	2024A	2025E	2026F	2027F	2028F	2029F	2030F	2031F	2032F	CAGR (2025-2032)
Content Creators	2,009.9	2,137.3	2,345.8	2,645.6	3,048.7	3,667.0	4,470.8	5,516.5	6,900.3	8,736.3	11,161.5	14,346.6	18,499.9	**26.0%**
Platforms & Social Media	1,468.9	1,546.5	1,680.6	1,876.5	2,141.1	2,549.8	3,077.9	3,760.1	4,656.8	5,837.4	7,383.9	9,396.9	11,997.3	**24.8%**
Tools & SaaS Providers	703.9	726.3	773.5	846.3	946.3	1,104.4	1,306.4	1,564.1	1,898.3	2,331.9	2,890.6	3,605.0	4,510.5	**22.3%**
Agencies & Creator Services	485.8	510.1	552.2	613.6	696.1	823.3	986.0	1,193.9	1,463.9	1,814.8	2,267.8	2,847.7	3,583.1	**23.4%**
Total	**4,668.5**	**4,920.2**	**5,352.1**	**5,982.1**	**6,832.1**	**8,144.5**	**9,841.1**	**12,034.6**	**14,919.3**	**18,720.4**	**23,703.8**	**30,196.3**	**38,590.8**	**24.9%**

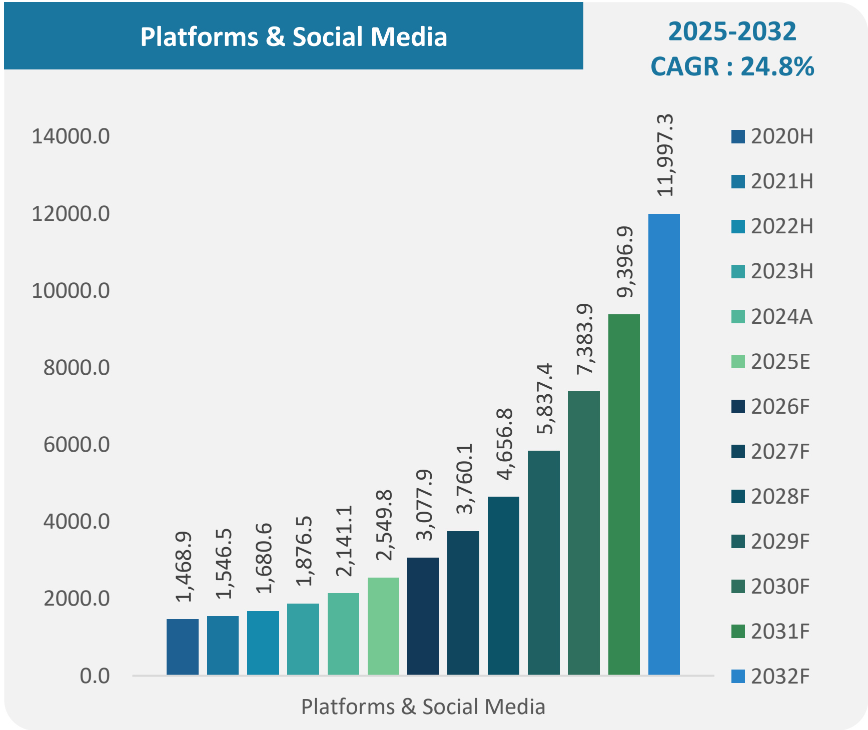
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

TABLE 4.2.6.A

France Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032





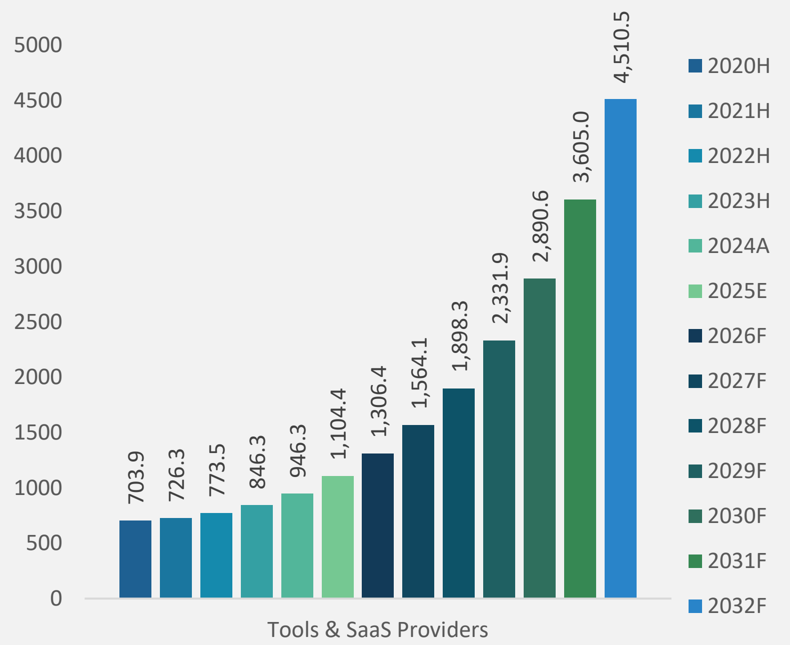
Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

FRANCE CREATOR ECONOMY MARKET, BY CREATOR ECONOMY ENTITIES

TABLE 4.2.6 France Creator Economy Market Value (US$ million) Analysis and Forecast, Creator Economy Entities, 2020-2032

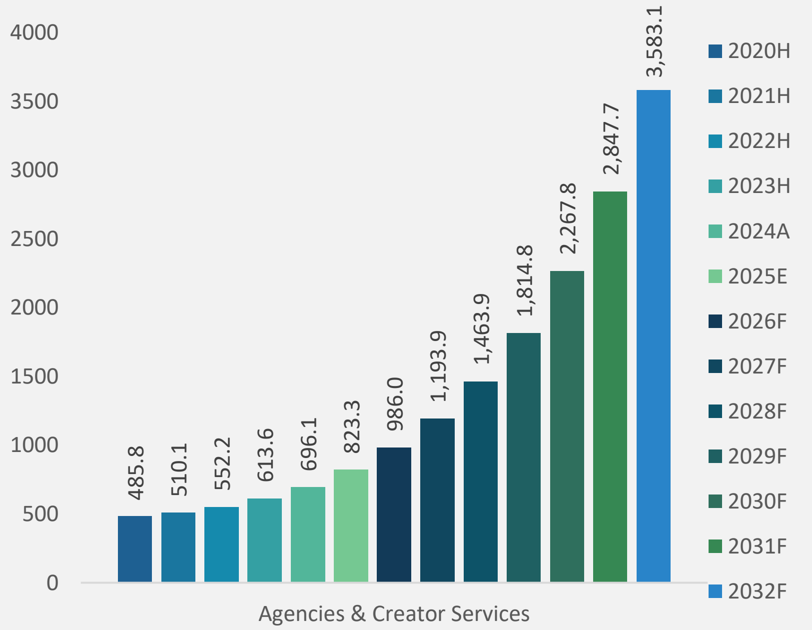
Tools & SaaS Providers

2025-2032 CAGR : 22.3%



Agencies & Creator Services

2025-2032 CAGR : 23.4%



Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

MONETIZATION STRATEGIES - ADVERTISING REVENUE

France – Context and Dynamics

➢ **Overview**:
Advertising remains a core but fluctuating revenue stream for French creators. YouTube AdSense, TikTok Pulse, and Shorts monetization are popular, with CPM rates generally between $1.74–$5.22 depending on content type and niche. The strongest performance is in entertainment, gaming, and lifestyle categories.

➢ **Platform Maturity**:
French creators rely heavily on YouTube and TikTok, with Twitch growing for live streaming. However, monetization tools lag slightly behind UK or German standards due to limited local partnerships.

➢ **Example**:
YouTubers like Squeezie and Cyprien generate strong ad-based income, supplemented by sponsorships.

Europe – Comparative Overview

➢ **Overview**:
In broader Europe, ad monetization is more lucrative in countries like the UK, Germany, and the Nordics, where CPM rates can exceed $6.96–$9.28 due to stronger brand budgets and higher purchasing power audiences. Many creators diversify across multiple platforms to stabilize revenue against algorithm changes.

➢ **Platform Maturity**:
UK, Germany, and the Netherlands have advanced analytics and audience monetization ecosystems, enabling better optimization of ad formats, content length, and niche targeting.

➢ **Example**:
In Germany, creators like Gronkh and Paluten earn high ad revenues from consistent gaming content with stable CPMs.

MONETIZATION STRATEGIES - SPONSORSHIPS AND BRAND PARTNERSHIPS

France – Context and Dynamics

- **Overview**:
Sponsorships are the dominant income source for French influencers. Local and multinational brands like L’Oréal, Renault, and Decathlon collaborate with lifestyle, fitness, and tech creators for long-term ambassadorships.

- **Trends**:
Mid-tier creators (50K–500K followers) are the most in-demand segment, offering higher engagement than celebrity influencers.

- **Example**:
EnjoyPhoenix (beauty/lifestyle) and Tibo InShape (fitness) are key French examples.

Europe – Comparative Overview

- **Overview**:
Across Europe, sponsorships are increasingly professionalized with influencer marketing agencies managing campaigns. The UK and Germany lead in structured contracts and performance-based models.

- **Trends**:
In Europe, the shift is toward data-driven influencer marketing. Nordic brands emphasize transparency and sustainability collaborations.

- **Example**:
In the UK, Zoe Sugg (Zoella) and KSI work with global brands under structured influencer management systems.

MONETIZATION STRATEGIES - MERCHANDISE SALES

France – Context and Dynamics

➢ **Overview**:
Merchandising is increasingly popular among French creators as audiences seek stronger identity and community connection. Common items include apparel, accessories, and books.

➢ **Market Nature**:
The model is community-centric in France small batches, limited editions, and storytelling are key.

➢ **Example**:
Tibo InShape sells gym apparel, while McFly & Carlito release humor-themed merchandise.

Europe – Comparative Overview

➢ **Overview**:
In Europe, creators have moved to scalable e-commerce models, often integrating Shopify, Spreadshirt, or print-on-demand services to manage larger global audiences.

➢ **Market Nature**:
The UK and Germany's merchandising ecosystems are more industrialized, focusing on efficiency and wide-scale distribution.

➢ **Example**:
In Germany, Unge and Rezo run successful online stores with mass international reach.

MONETIZATION STRATEGIES - AFFILIATE MARKETING

France – Context and Dynamics

➢ **Overview**:
Affiliate marketing is widely adopted by French YouTubers and bloggers in tech, beauty, and lifestyle niches. Platforms such as Amazon Partner, Rakuten, and Awin France dominate.

➢ **Trends**:
French creators use affiliate links in YouTube descriptions and Instagram stories; monetization is modest but stable.

➢ **Example**:
Tech YouTubers like Nowtech and Jojol rely on Amazon affiliate programs for steady passive income.

Europe – Comparative Overview

➢ **Overview**:
In Europe, affiliate marketing is far more structured with creators in the UK, Germany, and Central Europe benefiting from established e-commerce ecosystems and automated tracking tools.

➢ **Trends**:
In the UK and Nordics, affiliate income is higher due to greater consumer trust in influencer recommendations and better conversion tracking.

➢ **Example**:
German creator Technikfaultier uses affiliate programs with major retailers like Saturn and MediaMarkt.

MONETIZATION STRATEGIES - CROWDFUNDING AND SUBSCRIPTION MODELS

COHERENT MARKET INSIGHTS

France – Context and Dynamics

➢ **Overview**:
France has a strong subscription culture tied to community loyalty. Platforms like Patreon, Tipeee, and YouTube Memberships are commonly used for exclusive content or early access.

➢ **Niches**:
French creators in podcasting, education, and gaming dominate this model, focusing on premium subscriber-only experiences.

➢ **Example**:
Nota Bene (history YouTuber) runs successful Patreon campaigns.

Europe – Comparative Overview

➢ **Overview**:
Across Europe, creators increasingly turn to diversified revenue through Substack, Ko-fi, and Buy Me a Coffee. Adoption is highest in the UK, Nordics, and Netherlands.

➢ **Niches**:
European creators tend to integrate subscription tiers with newsletters, behind-the-scenes access, and online workshops.

➢ **Example**:
UK podcasters like The Rest is Politics monetize via ad-free subscription tiers on Patreon and Spotify.

MONETIZATION STRATEGIES - OTHERS (CONTENT LICENSING, LIVE EVENTS, IP, STARTUPS)

COHERENT MARKET INSIGHTS

France – Context and Dynamics

- **Overview**:
French creators increasingly monetize through live events, collaborations with traditional media, and IP licensing. Many have transitioned into media entrepreneurs.

- **Live & Experiential:**
Events like Vidéo City Paris and Paris Podcast Festival provide revenue from tickets, sponsorships, and brand experiences.

- **IP & Startups:**
Creators in France have begun registering trademarks and licensing character IPs to traditional media and animation studios.

- **Example:**
Squeezie launched his own media and music label, Boring Records.

Europe – Comparative Overview

- **Overview:**
In Europe, IP licensing and creator-founded startups are expanding. Germany and the UK lead with creators investing in gaming studios, production agencies, and tech startups.

- **Live & Experiential:**
Across Europe, large-scale creator conventions like Creator Conf (Germany) and Social Media Week (UK) drive community monetization.

- **IP & Startups:**
European creators (esp. in Germany and Scandinavia) experiment with NFT projects, game licensing, and digital collectibles.

- **Example:**
In the UK, Sidemen created a multimillion-pound business ecosystem with restaurants, clothing, and media production.

SECTION 5
FRANCE CREATOR ECONOMY MARKET

Brand & Influence Trends

PERCENTAGE OF BRANDS WORKING WITH CREATORS IN FRANCE VS EUROPE

Brand & Creator Collaboration: France vs. Europe (2025)

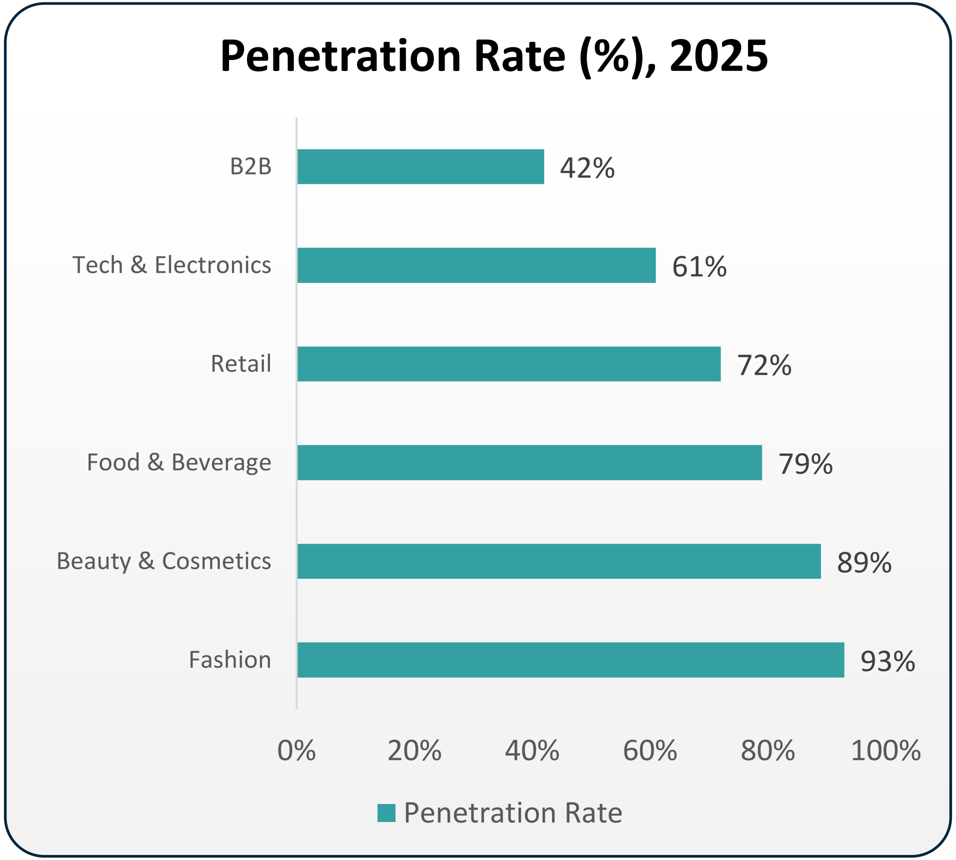
- **Key Statistics**
  - **Percentage of Brands Working with Creators**
    - France: 67% of brands actively partner with creators (influencer campaigns, sponsorships, ambassador programs).
    - Europe: 69% of brands engage in collaborations with creators, slightly ahead of France.
  - **Transparency & Professionalism**
    - France reports 84% disclosure rate for sponsored creator content, setting a European benchmark for transparency.
    - Gap in transparency between nano/micro and macro influencers fell to just 1% in 2025 versus 15% in 2023, indicating rising **Professional Standards**.
  - **Emerging Trends**
    - Growing shift to work with micro/nano-influencers for authenticity and community engagement, especially in France
    - Brand demand for creators with niche talents is rising, as video, live-streaming, and social commerce integrations boost ROI
    - Increased focus on eco-friendly and value-driven creator partnerships reflects evolving consumer expectations

Region	% Brands Collaborating	Transparency Rate	Engagement Uplift
France	67%	84%	+27%
Europe	69%	~80%+	+27%

% SHARE OF AD/MEDIA BUDGETS ALLOCATED TO INFLUENCER MARKETING

- According to **CMI Research**, influencer marketing has become one of the most strategic components of Europe's advertising ecosystem, with leading brands steadily increasing their investment toward creator-led campaigns. Most top brands now allocate **15–25% of their overall advertising budgets** to influencer marketing, reflecting growing confidence in the measurable returns and audience trust generated through authentic creator partnerships. The exact allocation depends on factors such as industry type, campaign objectives, and audience demographics, but this range highlights influencer marketing's transition from an experimental channel to a **core media investment**.
- Within Europe, **Instagram continues to dominate**, attracting **over half of total influencer marketing spending**, supported by its visual-first format, creator tools, and strong engagement rates. **YouTube accounts for around 28%,** driven by its long-form content depth and consistent viewership across key markets like Germany, France, and the U.K. Meanwhile, **TikTok and Twitch** are rapidly expanding, particularly among Gen Z and gaming audiences.

COHERENT MARKET INSIGHTS



- Fashion and beauty sectors lead due to highly visual platforms and influencer trust among target audiences.
- Food, retail, and tech sectors focus on authenticity, micro-influencer partnerships, and interactive social content to drive conversions.
- B2B influencer marketing, while growing, remains behind due to longer sales cycles and fewer established platforms for creator collaboration.
- France demonstrates a strong preference for “nano” and “micro” influencers (under 100k followers) due to high engagement and authenticity, especially in food, retail, and wellness.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

GROWTH POTENTIAL OF EUROPE'S CREATOR ECONOMY (1/2)

Technology as the Backbone of Creator Evolution

- Across Europe, technology has become a central catalyst for scaling creator output, analytics, and income management.
- The UK and Germany lead in AI-driven content optimization tools such as Captiv8, Tagger, and Infludata, which integrate deep audience analytics and predictive engagement metrics.
- Generative AI enables creators to automate video scripting, music production, and thumbnail creation tools like Synths.Video, Lumen5, and Runway ML dominate usage.
- Germany's Mittelstand sector (SMEs) collaborates with tech creators to integrate industrial storytelling on LinkedIn and YouTube.
- AI-based translation and subtitling software (e.g., DeepL, Papercup) allow European creators to scale multilingual content across borders.
- Virtual studios and mixed-reality production in the UK and Spain are driving new entertainment formats.
- Creators now operate hybrid setups, mixing content creation, automation, and business data tools like Notion AI and Airtable.
- Technological evolution supports cross-border monetization, enabling creators to target multi-market audiences efficiently.

Rise of New Platforms and Ecosystem Expansion

- Europe's creator ecosystem is diversifying through local platforms, pan-European networks, and vertical specialization.
- The UK continues to dominate influencer commerce through YouTube, Twitch, and TikTok Shop, integrating real-time shopping and affiliate tech.
- Italy and Spain are seeing rapid adoption of BeReal, Clash, and Triller, which emphasize authentic, unfiltered creator engagement.
- Germany's Stageverse and SocialHub provide ethical, ad-light spaces for content monetization focused on transparency and data privacy.
- Local crowdfunding platforms such as Goteo (Spain), Produzioni dal Basso (Italy), and Startnext (Germany) help creators fund digital and creative projects directly.
- LinkedIn Creators Program (Europe) fosters a growing class of B2B influencers, consultants, and digital educators across all regions.
- The Rise of Live Commerce is prominent in Southern Europe creators collaborate with retail brands via live-stream shopping on TikTok, Instagram, and Amazon Live Europe.
- Platform diversification ensures creators rely less on single-algorithm models and more on niche, community-driven networks.

GROWTH POTENTIAL OF EUROPE'S CREATOR ECONOMY (2/2)

B2B Influence: The Professionalization of Creators

- Europe's creator ecosystem is shifting from consumer content to professional, B2B storytelling partnerships.
- Corporations in the UK, Germany, and the Nordics are hiring creators as consultants and in-house content strategists.
- LinkedIn, HubSpot, and SAP run "creator-in-residence" programs to infuse authentic storytelling into brand communications.
- B2B influencers such as Lea Turner (UK) and Tijen Onaran (Germany) illustrate how personal branding drives business value and social leadership.
- In Italy and Spain, tourism boards and local governments increasingly partner with creators to boost regional promotion (e.g., Visit Valencia x local travel creators).
- Agencies like Takumi (UK) and Pulse Advertising (Germany) professionalize brand–creator relationships with ROI-based collaboration metrics.
- B2B content creators are also leading training, business education, and sustainability awareness initiatives.
- Corporate partnerships across Europe now prioritize authenticity, data-driven performance, and ESG narratives.

Diversification of Revenue Streams

- European creators are diversifying income through multi-platform monetization and entrepreneurship.
- UK creators lead the paid subscription economy via Patreon, OnlyFans (non-adult segment), and Ko-fi, emphasizing community-driven exclusivity.
- Merchandising and brand licensing have become a core pillar, with creators launching product lines through platforms like Spring and Spreadshirt (Germany).
- Affiliate marketing networks such as Awin (Germany) and Tradedoubler (Sweden) empower creators to integrate performance-based revenue models.
- Spain and Italy see strong growth in localized brand stores where creators co-launch fashion and beauty collections (e.g., Chiara Ferragni Collection, Dulceida Beauty).
- Online courses, digital coaching, and e-learning programs form a stable secondary income source platforms like Skillshare, Domestika (Spain), and Creative Fabrica (Netherlands) lead the market.
- Live events and community meet-ups (e.g., Social Media Week Europe, VidCon London) re-establish creators as cultural connectors.
- Entrepreneurial expansion has turned many creators into micro-enterprises, with teams for content, finance, legal, and partnerships.

GROWTH POTENTIAL OF FRANCE'S CREATOR ECONOMY (1/2)

Technology as the Backbone of Creator Evolution

- Technology is transforming France's creator economy through automation, AI-assisted editing, and data analytics.
- Artificial Intelligence (AI) tools are used for video editing, captioning, voiceovers, and idea generation.
- Creators personalize content using AI-driven insights to boost engagement and optimize performance.
- Popular tools include Runway ML, Synthesia, and Descript, widely used by YouTubers and digital agencies.
- Automation platforms like Later and Metricool streamline scheduling, analytics tracking, and content management.
- French influencer agencies such as Reech and Favikon use these tools for campaign optimization.
- AR and virtual production are expanding in fashion and lifestyle sectors for immersive storytelling.
- L'Oréal Paris employs AR filters for beauty try-on campaigns designed by creators.
- AI analytics platforms like Jellysmack and Kolsquare help creators measure ROI, predict trends, and analyze performance.
- Technology enables creators to operate as digital entrepreneurs, reducing production time and increasing monetization efficiency.

Rise of New Platforms and Ecosystem Expansion

- France's platform landscape is diversifying beyond global giants like YouTube, Instagram, and TikTok.
- Localized French platforms such as Dailymotion, MyTF1, and Utip.io promote ethical monetization and local-language content.
- Utip.io supports direct audience donations and micro-payments to creators, reducing reliance on ads.
- Niche and vertical content platforms are growing across gaming, education, sustainability, and wellness domains.
- Ulule supports crowdfunding for creative projects, and PlayPlay powers video content for corporate storytelling.
- Short-form video remains dominant on TikTok and YouTube Shorts, driving discovery and engagement.
- TikTok France collaborates with La French Tech to incubate creator startups and train nano-influencers.
- Live commerce is emerging through YouTube Live, Twitch, and Instagram Shop integrations.
- Influencers like Sananas and Léna Situations host live shopping sessions with real-time product demos.
- France is moving from being a platform follower to becoming an ecosystem innovator, giving creators more control and revenue stability.

GROWTH POTENTIAL OF FRANCE'S CREATOR ECONOMY (2/2)

B2B Influence: The Professionalization of Creators

- French creators are increasingly working with brands, startups, and corporations in professional B2B partnerships.
- Brand co-creation replaces one-time sponsorships, with creators joining product development and marketing teams.
- L'Oréal's Beauty Creators Program involves influencers in R&D and product launch cycles.
- Decathlon collaborates with sports creators to design and promote athletic gear.
- Leading creators are launching their own management firms and production studios to retain ownership and IP rights.
- Examples include Squeezie's Boring Records and Mcfly & Carlito's independent production ventures.
- Creators contribute to corporate training, communication, and employer branding in partnership with enterprises.
- Orange and BNP Paribas collaborate with creators for digital awareness and education initiatives.
- Data-driven influencer agencies like Kolsquare, Favikon, and Reech professionalize B2B collaborations with performance metrics.
- France's ecosystem now treats creators as consultants, strategic partners, and creative entrepreneurs rather than marketing tools.

Diversification of Revenue Streams

- French creators have diversified their income beyond advertising into multiple monetization channels.
- Brand partnerships remain the leading revenue source, accounting for around 40–45% of total earnings.
- Collaborations increasingly focus on long-term brand ambassadorships instead of single campaigns.
- Examples include Léna Situations' partnership with Dior Beauty and Tibo InShape's collaboration with MyProtein.
- Paid subscriptions and memberships on Patreon, Tipeee, and YouTube foster direct fan support and premium content models.
- French audiences show strong loyalty toward supporting local creators through these subscription models.
- Training programs and online courses allow creators to monetize their expertise via platforms like MyMooc, Ornikar, and Teachable France.
- EnjoyPhoenix's lifestyle brand, Tibo InShape's fitness gear, and Squeezie's merchandise exemplify this trend.
- Increasing numbers of creators invest in startups and register companies under SAS structures for financial efficiency.
- French broadcasters like TF1 and Canal+ adapt creator-generated stories into television or digital formats.

SECTION 6
FRANCE CREATOR ECONOMY MARKET

Emerging Trends

TREND: INFLUENCE FOR EQUITY   CREATORS AS EQUITY PARTNERS AND FRACTIONAL CMOS

OVERVIEW

A fast-emerging trend in the French creator economy is the rise of white-label content production, where creators produce branded content for companies but do not publish it on their personal channels. Instead, the content is used directly by the brand on its own digital platforms, ads, or social media. This marks a significant evolution from traditional influencer marketing where visibility depended on the creator's following toward a professionalized "creator-for-hire" model, where the value lies in creative skill, relatability, and production quality, not just reach.

Market Context in France - France's vibrant startup ecosystem anchored by hubs like Station F in Paris, La French Tech, and regional innovation clusters provides fertile ground for creator-startup collaborations. Startups in categories such as beauty, fashion, wellness, tech gadgets, gaming, and sustainable consumer goods are increasingly turning to creators for authentic marketing reach.

Key Examples

- In 2023–2025, French creators in fashion and beauty verticals have begun adopting this model, inspired by U.S. counterparts such as Emma Chamberlain (Chamberlain Coffee) or MrBeast (Feastables).
- French startups in D2C consumer goods are experimenting with similar arrangements, using micro-influencers for community-driven product launches.
- Investment networks like Creators' Collective and Influence Society France are emerging to formalize such partnerships and assist with legal structuring and valuation.

Impacts on the French Creator Economy

- Shift in Power Dynamics: Creators evolve from content vendors to strategic stakeholders. This elevates their status in the brand value chain.
- New Business Models: Agencies and talent management firms now structure "equity-based influencer deals," sometimes including revenue-sharing clauses.
- Valuation Awareness: Creators must learn to evaluate startup potential and negotiate fair equity percentages fueling a rise in creator advisory and legal services.
- Cross-Sector Expansion: Initially concentrated in consumer brands, the model is extending into SaaS startups, gaming platforms, edtech, and wellness brands

WHITE-LABEL CONTENT PRODUCTION (CREATORS PRODUCING BRANDED CONTENT WITHOUT POSTING IT ON THEIR OWN CHANNELS) – (1/2)

COHERENT MARKET INSIGHTS

OVERVIEW

A fast-emerging trend in the French creator economy is the rise of white-label content production, where creators produce branded content for companies but do not publish it on their personal channels. Instead, the content is used directly by the brand on its own digital platforms, ads, or social media. This marks a significant evolution from traditional influencer marketing where visibility depended on the creator's following toward a professionalized "creator-for-hire" model, where the value lies in creative skill, relatability, and production quality, not just reach.

Market Context in France

- The French digital advertising and influencer ecosystem is maturing rapidly, with brands demanding **authentic, user-generated content (UGC)** that feels organic yet professionally crafted. However, influencer campaigns often come with limitations high fees, one-time exposure, and risks tied to creator reputation.
- **White-label content** solves these challenges. Brands, especially **D2C, retail, FMCG, and tech startups**, now hire creators to:
- Script, film, and edit short-form videos or product tutorials,
- Capture authentic customer-style testimonials,
- Develop lifestyle visuals for ad libraries, without ever posting them on their personal accounts.
- This "behind-the-scenes" model enables brands to **own the content** and **use it repeatedly across marketing channels** including TikTok Ads, Meta Ads, and e-commerce pages.

WHITE-LABEL CONTENT PRODUCTION (CREATORS PRODUCING BRANDED CONTENT WITHOUT POSTING IT ON THEIR OWN CHANNELS) – (2/2)

COHERENT MARKET INSIGHTS

Mechanics of White-Label Content Creation

Step	Process Description
1. Selection	Brands identify creators based on aesthetic, skillset, and demographic alignment not follower count.
2. Production	Creator develops customized video or photo content featuring the product, following brand guidelines.
3. Delivery	Final content is handed over to the brand who owns full usage rights.
4. Deployment	Brand runs the content as native ad creatives, UGC-style campaigns, or paid social posts.

Mechanics of White-Label Content Creation

- **Examples and Applications in France**
- **Beauty & Skincare:** Brands like *Typology Paris* and *Respire* collaborate with creators to produce UGC-style product demos for TikTok ads.
- **Fashion & Accessories:** *Sézane* and *Balzac Paris* hire creators for lifestyle video shoots, later repurposed in ad campaigns.
- **Food & Beverage Startups:** Emerging French D2C brands use white-label creators to generate recipe and testimonial content.
- **Tech and App Startups:** Creators craft explainer clips for SaaS, fintech, and edtech applications especially for vertical ad formats.
- This segment is now **becoming institutionalized**, with agencies and SaaS platforms (e.g., *Kolsquare, Hivency by Skeepers, UGC Factory France*) offering white-label content matchmaking services.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

KEY MAN RISK IN CREATOR-CENTRIC COMPANIES: DEPERSONALIZING INFLUENCE (1/2)

COHERENT MARKET INSIGHTS

OVERVIEW

- The French creator economy is witnessing a structural challenge as individual-led brands mature into scalable businesses. Many creator-driven ventures from media channels to fashion labels depend almost entirely on the persona, tone, and consistency of one individual. This creates "key man risk": the business's performance, brand value, and investor confidence hinge on one person's presence or reputation. If that individual were to exit, face controversy, or simply take a hiatus, the entire business model could unravel. The need to depersonalize or institutionalize creator brands is therefore becoming central to long-term value creation.

- **Key Examples of Key Man Risk in France**

Creator/Brand	Business Type	Key Man Risk Factor	Depersonalization Strategy (Current or Needed)
HugoDécrypte (Hugo Travers)	Gen-Z media/news platform	Hugo's personality and delivery style define tone and trust	Expanding into **editorial newsroom** and **distributed journalism team** to diversify voice
Léna Situations (Léna Mahfouf)	Fashion & lifestyle brand "Hôtel Mahfouf"	Audience and sales tied to her authenticity and social media activity	Can evolve into **independent creative label** with external designers and brand team
Squeezie (Lucas Hauchard)	YouTube entertainment, gaming, and music projects	Content engagement and partnerships depend on his persona	Building **Squeezie Agency** and supporting other creators to decentralize reach
Natoo (Nathalie Odzierejko)	Comedy & lifestyle creator	Brand and book deals based on her humor style	Potential for **content studio model** producing shows beyond her personal channel
Cyprien	Entertainment & animation	Audience retention linked to his character	Transitioning toward **animated production house** with scalable IP
Mcfly & Carlito	Comedy duo, podcast & live content	Reliant on duo chemistry and co-brand identity	Opportunity to create **production brand for emerging humorists**

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

KEY MAN RISK IN CREATOR-CENTRIC COMPANIES: DEPERSONALIZING INFLUENCE (2/2)

COHERENT MARKET INSIGHTS

Emerging Solutions to Mitigate Key Man Risk

Strategy	Detailed Description	Example / Application (France)
Brand Institutionalization	This involves transforming a creator-driven project into a structured company with professional departments such as marketing, editorial, operations, and finance that can function even without the creator's direct involvement. The goal is to transfer dependency from a personality to a process.	HugoDécrypte is actively pursuing this path by hiring journalists, editors, producers, and social strategists. Over time, the brand aims to become a youth news media company rather than "Hugo Travers' channel."
Content Studio Model	The creator evolves into a producer or executive, using their platform to incubate and promote new talents or spin-off shows. The creator's identity becomes a "brand umbrella" that supports multiple creators, allowing content diversity and longevity.	Squeezie, one of France's largest YouTubers, has begun supporting and producing content for other creators, effectively functioning as a creator studio. This model mirrors the U.S. "MrBeast Studios" or "Dude Perfect Media" approach.
IP and Licensing Expansion	Focuses on developing intellectual property such as brand mascots, storylines, show formats, characters, or merchandise that can be monetized and recognized independent of the creator's personal image. This transforms influence into tangible, ownable assets.	Some French creators are experimenting with animated content and fashion lines that have their own brand DNA. For instance, a creator could launch a clothing line whose aesthetic identity (logo, storytelling) survives even if the creator exits the scene.
Co-Creator or Collaborative Ecosystem	The creator shares their platform and narrative with other on-screen personalities, guest hosts, or collaborators who can gradually take over some roles. This model builds a distributed voice rather than a single central figure.	HugoDécrypte is expanding this model by featuring multiple correspondents and interviewers. Similarly, creators like Léna Situations often collaborate with peers, creating a networked influence model rather than a solo operation.
Succession & Governance Planning	Involves formalizing ownership, management, and continuity structures typically via holding companies, management boards, and clear equity allocation. It defines who runs the business if the creator steps down, ensuring operational stability.	Many French creators are setting up SAS (Société par Actions Simplifiée) holding structures that separate personal income from brand IP. This enables professional management and opens paths for investment or acquisition (e.g., future IPO or media buyout).

EMPLOYEE ADVOCACY IN THE FRENCH CREATOR ECONOMY – (1/2)

OVERVIEW

Employee advocacy refers to the practice where company employees act as micro-influencers or brand ambassadors by promoting the organization's values, culture, and products through their own social media presence. This model is gaining strong traction in France as corporate communication evolves from traditional PR to authentic, decentralized storytelling. Instead of relying solely on paid influencers, brands empower their own workforce to be the voice of the company blending professional credibility with social authenticity.

Why It's Emerging in France

- Several socio-cultural and economic shifts make France fertile ground for employee advocacy:
- **Trust and transparency**: French consumers increasingly trust "people like me" over corporate marketing.
- **Rise of LinkedIn and professional creator culture**: Platforms like LinkedIn, X (formerly Twitter), and TikTok Business are becoming hubs for employee-led thought leadership.
- **Corporate digital transformation**: Companies across sectors are investing in internal advocacy programs to humanize their brands.
- **Content saturation**: Paid influencer content is losing impact; employee-generated content stands out as more credible.

EMPLOYEE ADVOCACY IN THE FRENCH CREATOR ECONOMY – (2/2)

How Employee Advocacy Works

- Selection: Identify motivated employees (from marketing, HR, sales, or technical teams) to represent the brand authentically.
- Training: Conduct workshops on personal branding, tone, and responsible social media communication. Provide support for content creation and storytelling techniques.
- Enablement Tools: Use dedicated advocacy platforms such as Sociabble (France), Hootsuite Amplify, or Sprinklr Advocacy. Provide pre-approved, shareable content for employees to post easily.
- Incentives: Offer recognition, internal awards, bonuses, or visibility opportunities for active brand advocates. Showcase top-performing advocates in company newsletters or internal communications.
- Measurement: Track key metrics like reach, engagement, brand sentiment, and lead generation. Use analytics dashboards from advocacy platforms to quantify impact.

Key Examples in France

- **Sociabble (France):** A French employee advocacy platform enabling staff to share curated company content on social media, increasing engagement, reach, and brand visibility.
- **L'Oréal – "#WeAreLOréal" Program:** Empowers employees to post authentic content about company culture, sustainability, and innovation. Thousands of staff act as internal brand ambassadors.
- **Orange Group:** Employee brand ambassador program promoting tech innovation and CSR initiatives; employees serve as digital storytellers for the company.
- **Publicis Groupe:** Encourages consultants and creatives to share campaign insights and projects, humanizing the agency and attracting talent.
- **BNP Paribas / Société Générale:** Employees promote fintech, ESG, and innovation initiatives, enhancing thought leadership and B2B engagement.

ENTREPRENEURS TURNING INTO CREATORS

OVERVIEW

A new evolution in the French creator economy is the rise of entrepreneurs becoming creators themselves. In this model, founders and business owners actively produce content videos, podcasts, blogs, and social media posts to engage audiences, grow their brands, and attract customers or investors. This shift blurs the line between entrepreneurship and content creation, making founders not just CEOs but also personal brands that amplify business visibility. The strategy relies on authenticity, storytelling, and expertise rather than traditional advertising.

How Entrepreneurs Become Creators

- Personal Branding- Founders share stories, lessons, and insights from building their startup, establishing themselves as industry thought leaders.
- Content Platforms- Active use of LinkedIn, X (formerly Twitter), Instagram, TikTok, and YouTube to reach target audiences.
- Educational Content- Sharing expertise via tutorials, case studies, and webinars positions the founder as a trusted authority.
- Behind-the-Scenes Storytelling- Documenting product development, fundraising journeys, and team culture humanizes the business.
- Community Engagement- Founders interact with followers, answer questions, and build a loyal community around the brand.

Examples in France – Entrepreneurs Turning into Creators

- **Léna Mahfouf (Léna Situations):** Entrepreneur and content creator who shares her journey in fashion and lifestyle ventures, using personal storytelling to amplify product launches and strengthen brand loyalty.
- **Romain Lanéry (Alan – Health Insurtech):** Founder who shares insights on startup building, industry trends, and fundraising, establishing thought leadership and attracting talent and investors.
- **Oussama Ammar (The Family):** Entrepreneur and educator who produces startup advice and educational content, expanding his influence and building a network of entrepreneurs and investors.
- **Guillaume Gibault (Le Slip Français):** Founder who showcases behind-the-scenes production, company culture, and brand values, humanizing the brand and increasing customer and media engagement.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

CEO/CREATOR MATCHMAKING (1/2)

OVERVIEW

As the creator economy matures in France and globally, a new model is emerging where companies actively pair CEOs or founders with creators to amplify their brand, product launches, and corporate communications. This is called CEO/Creator matchmaking. Unlike traditional influencer marketing, this model is strategic and long-term, focusing on aligning a company's leadership with creators whose values, audience, and content style match the business's objectives. The partnership is not just transactional; it often involves co-creation of content, public appearances, and shared campaigns where the CEO or founder becomes a recognizable, engaging presence alongside professional creators. This approach benefits both sides: the CEO gains authentic engagement and visibility, while creators access brand credibility, resources, and networks, forming a symbiotic relationship that enhances growth and trust.

How CEO/Creator Matchmaking Works

- Companies identify creators whose audience, style, and values align with the CEO's personality and the brand's mission.
- Develop campaigns, educational content, thought leadership posts, or product launches that feature both the CEO and the creator.
- Decide where the collaboration will be most effective   LinkedIn for B2B thought leadership, TikTok/Instagram for product storytelling, YouTube for long-form narratives.
- Ensure the collaboration benefits both parties. CEOs gain influence and audience engagement; creators gain credibility, access to company resources, and potential revenue-sharing opportunities.
- Track engagement, lead generation, brand sentiment, and audience growth to assess the impact and refine future campaigns.

CEO/CREATOR MATCHMAKING (2/2)

Examples and Emerging Models in France

- Hugo Travers (HugoDécrypte) collaborates with startups for co-created content campaigns where founders authentically explain their products in a Gen-Z-friendly format. This approach leverages Hugo's reach and trust with young audiences to humanize tech innovations.
- Early-stage French tech companies often pair their founders with TikTok creators. This match amplifies complex product stories with social media creators who can translate technical details into engaging, relatable content for social audiences.
- L'Oréal senior executives sometimes co-create content with popular French lifestyle influencers. These campaigns focus on promoting sustainability initiatives or brand innovation, blending corporate leadership visibility with influencer authenticity.
- Another matchmaking trend involves curated events and platforms that facilitate focused CEO-creator partnerships aimed at business growth, innovation communication, or community building. Examples include exclusive networking parties and events in Paris that bring together high-profile professionals and creators.
- Platforms like Collabstr enable brands and startups to directly find and hire French UGC (User Generated Content) creators with tailored audiences, streamlining the matchmaking process for campaign collaborations.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

NANO-INFLUENCE AND USER-GENERATED CONTENT (UGC)

OVERVIEW

Nano-influencers are social media creators with **smaller, highly engaged audiences**, typically ranging from **1,000 to 10,000 followers**. Unlike mega-influencers, they do not rely on mass reach but instead on **personalized, authentic engagement** with niche communities. **User-Generated Content (UGC)** refers to content created organically by consumers or users of a brand's products and services. UGC can take the form of photos, reviews, videos, testimonials, or unboxing experiences shared on social media. The intersection of **nano-influencers and UGC** is emerging as a **cost-effective, high-trust marketing strategy**. Brands leverage everyday consumers and micro-communities to generate authentic content that resonates more than traditional influencer campaigns or paid advertisements.

Why It's Emerging in France

- **Authenticity & Trust:** French audiences, especially Millennials and Gen Z, value real experiences over polished marketing messages. Nano-influencers and UGC deliver this authenticity.
- **Cost Efficiency:** Working with nano-influencers is more affordable than partnering with top-tier creators or celebrities.
- **Higher Engagement:** Smaller, tight-knit communities generate **higher engagement rates** than large-scale influencer campaigns.
- **Scalability:** Brands can work with **multiple nano-influencers** simultaneously, creating a network effect.
- **Social Commerce Growth:** UGC directly drives conversions on e-commerce platforms, social marketplaces, and apps.
- **Local Community Relevance:** Nano-influencers often have geographically or culturally targeted audiences, ideal for French brands with localized campaigns.

Key Benefits

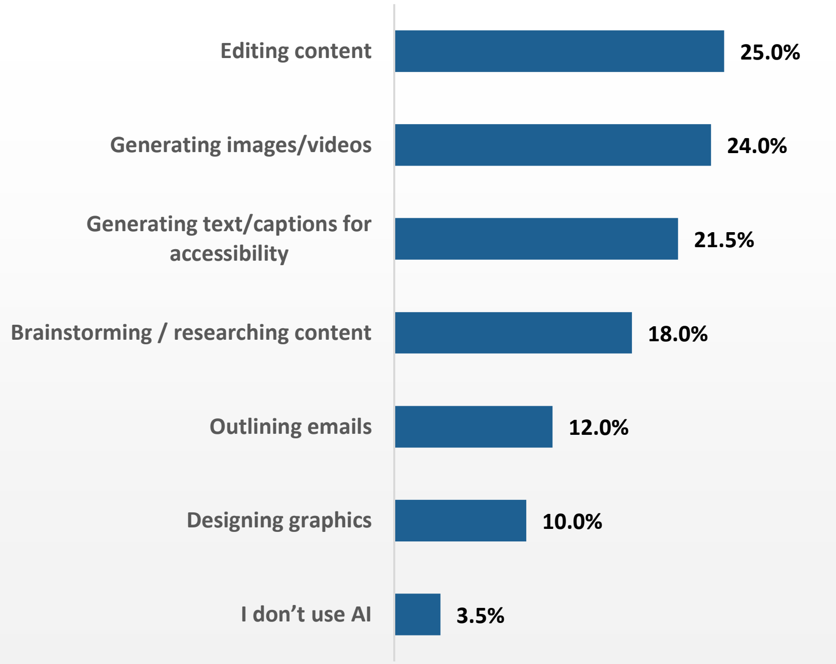
- **Authenticity:** Builds trust because content is created by real users rather than corporate marketers.
- **Cost-Effectiveness:** Campaigns require lower budgets than traditional influencer marketing.
- **Higher Engagement Rates:** Nano-influencers' content often receives more comments, shares, and reactions per follower.
- **Scalable Campaigns:** Multiple small creators can collectively reach a large audience while maintaining niche relevance.
- **Content Diversity:** Continuous flow of creative, organic content without heavy production costs.
- **Social Proof:** UGC validates product quality, increasing conversion rates and brand loyalty.

GENERATIVE AI IN CONTENT CREATION AND AUDIENCE MANAGEMENT

OVERVIEW

Generative AI is revolutionizing how creators, brands, and entrepreneurs in France produce content and manage audiences. This technology leverages machine learning models, natural language processing (NLP), and computer vision to automatically generate text, images, video, audio, and social media posts. For creators, generative AI enables faster, scalable, and cost-efficient content production without compromising quality. For brands and startups, AI tools optimize audience management, personalization, and engagement, allowing businesses to interact with followers, customers, and communities in a more intelligent and data-driven manner.

How France Creators are Utilizing AI in 2025



IS THE CREATOR ECONOMY BECOMING A PAY-TO-PLAY? (1/3)

Is the Creator Economy becoming a Pay to Play ?

Yes: the Europe Creator Economy is increasingly becoming Pay-to-Play as Creators are investing in:

- Paid boosts,
- Production quality,
- SaaS Tools,
- Agency Support, and
- Platform Monetization Mechanisms

  are gaining a disproportionate share of reach, visibility, and earnings.
- This trend is reshaping competition and making financial investment a **key driver of creator success** in Europe.

Growing Dependence on Paid Visibility

- ➢ Major European platforms (Instagram, TikTok, YouTube, Twitch) increasingly prioritize **paid boosts**, sponsored posts, and algorithm-driven ad spend.
- ➢ Organic reach has declined significantly across Europe, pushing creators to invest in **promoted content** to remain discoverable.

Algorithm Changes Favor High-Spending Creators

- ➢ Algorithms increasingly reward creators who use **paid tools**, ads, or platform-linked commerce solutions.
- ➢ New entrants and small creators find it harder to gain traction without **paid amplification**.

IS THE CREATOR ECONOMY BECOMING A PAY-TO-PLAY? (2/3)

Rising Cost of Professional Content Production

- High-quality video, audio, and livestreaming the dominant segments in Europe require:
  - Advanced cameras, lighting, editing software
  - Professional post-production
  - Paid SaaS tools (analytics, scheduling, monetization tools)
- This creates **upfront financial barriers**, pushing creators toward professionalization.

Platforms Monetizing Creator Tools

- European creators are adopting paid solutions such as:
  - Premium scheduling/analytics tools
  - Paid editor suites
  - Affiliate marketplaces and ad-matching
  - Revenue-sharing platforms
- The shift from free-to-freemium pushes creators into recurring subscription costs to stay competitive.

IS THE CREATOR ECONOMY BECOMING A PAY-TO-PLAY? (3/3)

Increasing Reliance on Paid Collaborations & Agencies

- Brand-creator matchmaking in Europe leans heavily toward **paid influencer agencies** and talent networks.
- Creators often pay:
  - Agency fees
  - Paid campaign applications
  - Platform commissions
- This reinforces a **financial "entry ticket"** to secure high-value brand deals.

Digital Competition Driving Paid Growth

- Europe's creator market is saturated, with millions of micro and nano creators competing for visibility.
- Saturation pushes creators toward:
  - Paid ads
  - Paid SEO/SEM
  - Paid placements
  - Paid participation in creator marketplaces
- Competitive pressure is transforming organic growth into pay-driven growth.

Pay-to-Play Effects Are Uneven Across Europe

- Western Europe (UK, Germany, France) shows **strongest pay-to-play trends** due to platform maturity and high brand spending.
- Southern/Eastern Europe see slower adoption but rising reliance on paid tools.

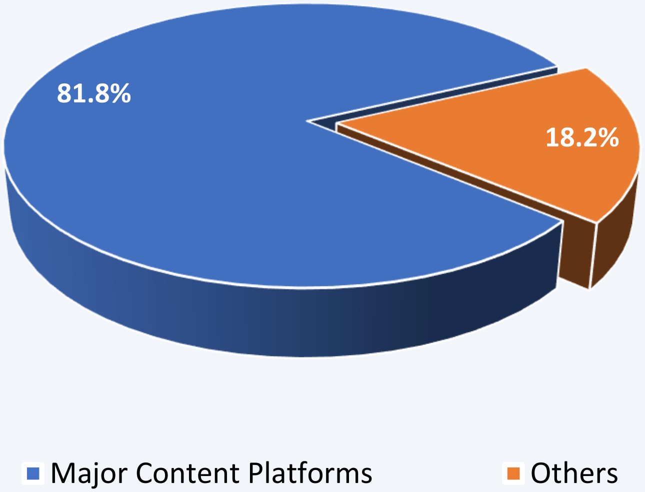
COHERENT MARKET INSIGHTS

SECTION 7
FRANCE CREATOR ECONOMY MARKET

Competitive Landscape

MAJOR CONTENT PLATFORMS AND THEIR REVENUE SHARE ANALYSIS, 2024 - EUROPE

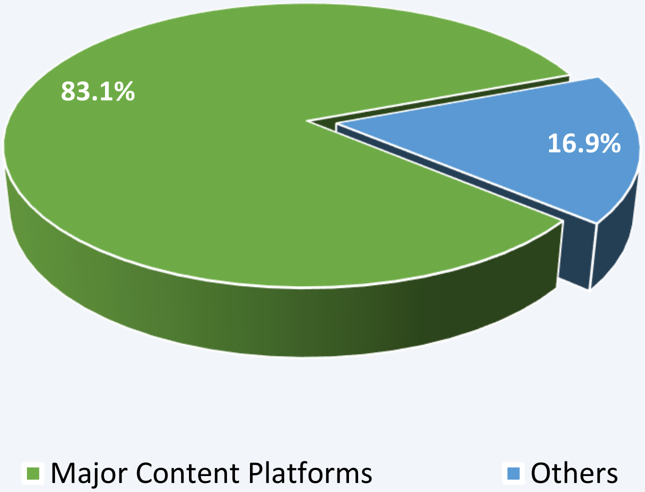
Company Revenue Share (%) Analysis, 2024



- **Major Content Platforms holds 81.8% market share in Europe Creator Economy Market including** YouTube (Google), META Platforms (Instagram, Facebook), TikTok, Spotify, Twitch, Snapchat
- **The remaining 18.2% market share is held by players such as:**
  - Skillshare
  - Vimeo.com, Inc.
  - PocketWatch, Inc.
  - Substack Inc.
  - Adobe Inc.
  - YouNow
  - X (Twitter)
  - Patreon
  - Others

MAJOR CONTENT PLATFORMS AND THEIR REVENUE SHARE ANALYSIS, 2024 - FRANCE

Company Revenue Share (%) Analysis, 2024



- **Major Content Platforms holds 83.1% market share in France Creator Economy Market including** YouTube (Google), META Platforms (Instagram, Facebook), TikTok, Twitch, Spotify, Snapchat
- **The remaining 16.9% market share is held by players such as:**
  - Patreon
  - Substack Inc.
  - Adobe Inc.
  - Skillshare
  - Vimeo.com, Inc.
  - PocketWatch, Inc.
  - YouNow
  - X (Twitter)
  - Others

COHERENT MARKET INSIGHTS

SECTION 8
FRANCE CREATOR ECONOMY MARKET

Operational Recommendation

OPERATIONAL RECOMMENDATION (1/2)

GO-TO-MARKET GUIDANCE FOR BRANDS

- Prioritize creator partnerships that align with brand identity, audience demographics, and content authenticity.
- Adopt a multi-tier strategy by combining nano/micro creators for trust and macro/mega creators for reach.
- Diversify across platforms (Instagram, TikTok, YouTube) based on content goals, discovery formats, and conversion potential.
- Invest in long-term creator relationships rather than one-off campaigns to improve performance consistency and brand affinity.
- Use creators early in the funnel (awareness) but also extend into mid-funnel (UGC, tutorials) and bottom-funnel (social commerce).Allocate budgets dynamically using performance insights such as CPM, cost-per-engagement, and ROAS.
- Integrate creator-generated content into paid media (whitelisting, Spark Ads, Instagram Boosting) for scalable reach.

PRIORITY KPIS FOR CMOs

- **Engagement Rate:** Measures creator-audience interaction quality (likes, comments, shares, saves).
- **Reach & Impressions:** Evaluates brand visibility and content distribution scale.
- **Cost per Engagement (CPE):** Helps assess efficiency of creator campaigns versus traditional media.
- **Conversion Rate:** Tracks purchase or action driven through creator content.
- **Earned Media Value (EMV):** Estimates PR and attention generated organically beyond paid spend.
- **View-Through & Click-Through Rates (VTR/CTR):** Critical for evaluating video and short-form content effectiveness.
- **Return on Ad Spend (ROAS):** Measures profitability of creator-driven campaigns.
- **Retention & Repeat Purchase:** Especially important for influencer-driven e-commerce funnels.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

OPERATIONAL RECOMMENDATION (2/2)

Compliance Checklist (ARPP / ARCOM)

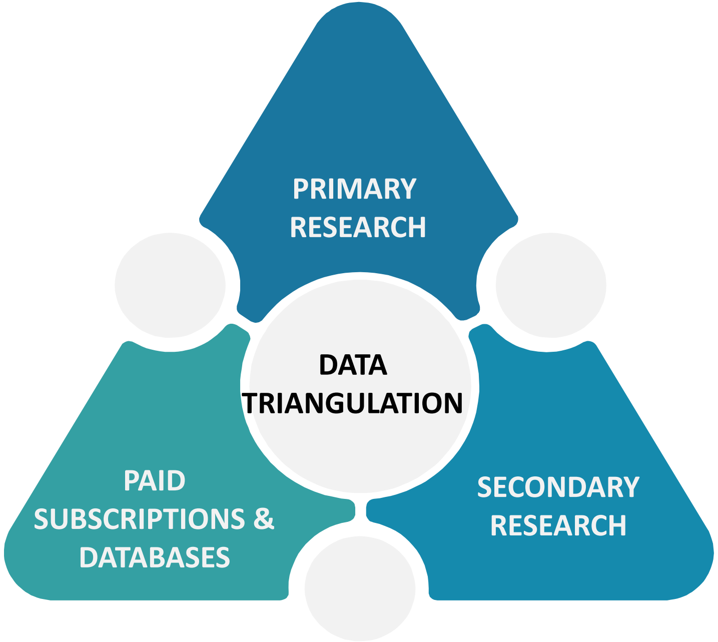
- **Transparency & Labeling (ARPP)**
  - Ensure creators clearly disclose commercial partnerships using visible labels (e.g., *#publicité, #sponsorisé, #collaboration*).
  - Avoid misleading placement—disclosure must appear before or at the beginning of the content.
  - Maintain full transparency for gifted products, affiliate links, or paid collaborations.
- **Content Responsibility (ARCOM)**
  - Verify creators comply with advertising rules for regulated categories (alcohol, finance, health, environmental claims).
  - Ensure content does not contain harmful, discriminatory, or illegal claims.
  - Retain documentation of campaign briefs and compliance confirmations.
- **Minors & Sensitive Audiences**
  - Ensure age restrictions are applied for content targeting minors.
  - Prohibit partnership promotions involving harmful or age-restricted products directed at young audiences.
- **Intellectual Property & Rights Usage**
  - Secure written rights for reuse of creator content in paid amplification or cross-channel campaigns.
  - Confirm licensing agreements before repurposing UGC or influencer videos.
- **Data & Privacy**
  - Ensure collection of user data aligns with GDPR requirements.
  - Avoid requiring creators to collect or store consumer data without compliance support.

Source: Primary Research, Desk Research, Paid Subscriptions, CMI Data Repository

SECTION 9
FRANCE CREATOR ECONOMY MARKET
RESEARCH METHODOLOGY

OVERALL RESEARCH COMPONENTS

Pillars of Research Components



Primary Research

Primary research involved in-depth interviews and discussions across the Europe Creator Economy value chain, including: Content Creators Platforms & Social Media Teams, Podcasting & Audio Platforms, Live Streaming Platforms, eCommerce & Monetization Platforms, Agencies & Talent Management Firms, etc.

Primary research provided ground-level insights on creator monetization patterns, platform usage behavior, pricing benchmarks, consumer influence drivers, and regulatory challenges across Europe.

Secondary Research

Secondary research entailed a systematic review and consolidation of credible public sources to build baselines and validate assumptions, covering: Government & institutional data, Industry associations & technical papers, magazines, white papers, etc.

Objectives: Secondary research established reliable market baselines, quantified platform adoption, and mapped the competitive and regulatory landscape across European countries. It also identified key growth indicators such as engagement shifts, monetization adoption rates, and brand investment trends.

Paid Subscriptions & Databases

These sources provided quantitative depth and cross-checks where public data is sparse, including: Company & funding intelligence, Web & app analytics, Fin/ops benchmarks, etc.

Use cases: Paid databases delivered quantitative depth for market sizing, creator earnings normalization, audience analytics, and CPM/CPE benchmarking across platforms and countries. They strengthened triangulation with accurate platform metrics, consumer behavior data, and investment/funding intelligence for the European creator ecosystem.

PRIMARY RESEARCH: ENTITIES TO WHOM WE SPOKE (1/5)

COHERENT MARKET INSIGHTS

Primary Research Interviews with following Entities along with Key Datapoints Captured

Content Creators (Micro, Mid-tier, Macro, Mega)

- Revenue mix (ads, sponsorships, subs, merch, affiliate, tips)
- Platform usage & multi-platform strategies
- Engagement & algorithm reach challenges
- Category performance insights (beauty, gaming, lifestyle, etc.)
- Pricing benchmarks (CPM, CPE, sponsorship rates)
- Pain points: burnout, income instability, compliance issues

Platforms & Social Media Companies

- Monetization programs & payout models
- DAU/MAU trends across European regions
- Algorithm updates, content policies & moderation
- Revenue-share structures & creator incentives
- Platform compliance with GDPR/DSA/DMA
- Audience insights by country & category

Creator Agencies & Talent Management Firms

- Revenue-share & partnership models
- Brand-creator collaboration pricing
- Category performance benchmarks
- Talent selection & campaign workflow
- IP ownership & contract structures
- Challenges in cross-border collaborations

Tools & SaaS Providers

- Feature adoption (analytics, CRM, AI tools)
- Pricing models & subscription metrics
- Integration with major platforms
- User profiles (creator tier/category)
- Churn drivers & product gaps
- Others

Brand Advertisers & Marketers

- Budget allocation to creator marketing
- Preferred platforms for campaigns
- Key KPIs (ROAS, conversions, reach)
- Pricing & negotiation norms
- Compliance expectations (ASA, GDPR)
- Cross-country campaign behavior

eCommerce & Monetization Platforms

- Subscription & patronage trends
- Engagement tools usage (exclusive content, communities)
- Conversion drivers for tips & merch
- Fees, commissions & payout cycles
- Category-wise adoption patterns

PRIMARY RESEARCH: ENTITIES TO WHOM WE SPOKE (2/5)

Respondent Category	Interviews Conducted	Use Case (as shared by Respondents)	Application of Insights	Type of Data (Qualitative / Quantitative)
Content Creators (Micro, Mid-tier, Macro, Mega)	222	Creators reported 25–40% QoQ fluctuations in sponsorship income due to algorithm changes impacting reach and earnings stability.	• Calibrates creator income models • Maps platform dependency & engagement volatility • Establishes pricing benchmarks (CPM, CPE, sponsorship rates)	**Quantitative:** earnings mix, engagement rates, payouts **Qualitative:** challenges, workflow, monetization pain points
Platforms & Social Media Companies (Instagram, TikTok, YouTube, Twitch, Snapchat, Pinterest)	166	Platforms shared 3.2× YoY growth in short-form content consumption across Europe, driving higher creator adoption.	• Validates platform adoption & content trends • Benchmarks monetization & payout structures • Assesses GDPR/DSA/DMA impact on visibility	**Quantitative:** MAUs/DAUs, payout data **Qualitative:** algorithm policies, moderation insights
Creator Agencies & Talent Management Firms	145	Agencies saw a 45–60% rise in mid-tier creator campaigns due to higher authenticity and conversion rates.	• Defines pricing benchmarks & ROI norms • Maps category performance (beauty, gaming, lifestyle) • Assesses cross-border collaboration trends	**Quantitative:** campaign budgets, KPIs, conversions **Qualitative:** negotiation models, compliance practices

****Total 935+ interviews were conducted in the year 2024, constituting 70% of the total market validation via primary research***

PRIMARY RESEARCH: ENTITIES TO WHOM WE SPOKE (3/5)

Respondent Category	Interviews Conducted	Use Case (as shared by Respondents)	Application of Insights	Type of Data (Qualitative / Quantitative)
Tools & SaaS Providers (analytics, editing, AI, CRM)	125	SaaS providers reported 2.8× growth in AI-editing tool adoption among small creators, improving posting frequency.	• Benchmarks tool adoption & usage patterns • Supports forecasting for creator-tech spending • Maps feature gaps & user churn drivers	**Quantitative:** subscription data, usage rates **Qualitative:** product feedback, workflow insights
Brand Advertisers & Marketers	180	Retail & beauty brands reported creator-led campaigns delivering 1.7–2.3× higher conversion than standard digital ads.	• Establishes ROI benchmarks • Identifies top creator categories & platforms • Maps budget allocation across countries	**Quantitative:** ROAS, CPC, CPE, conversions **Qualitative:** brand criteria & expectations
eCommerce & Monetization Platforms (Patreon, Ko-fi, Shopify, Etsy)	97	Platforms reported 30–55% growth in subscription-based creator revenue across education, music, gaming & coaching.	• Validates subscription & merch trends • Models recurring revenue potential • Maps retention & engagement patterns	**Quantitative:** subscription volumes, merch sales **Qualitative:** user engagement, retention insights

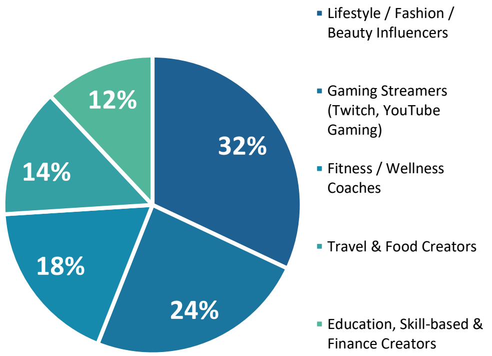
*****Total 935+ interviews were conducted in the year 2024, constituting 70% of the total market validation via primary research***

PRIMARY RESEARCH: ENTITIES TO WHOM WE SPOKE (4/5)

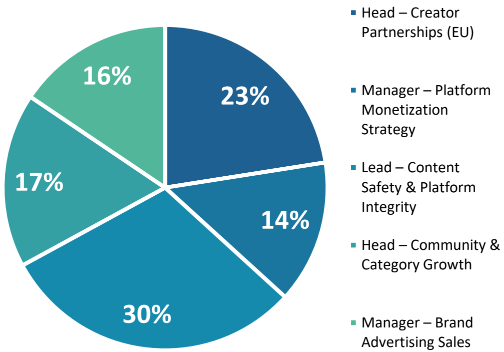
COHERENT MARKET INSIGHTS

Interview Coverage by Designation

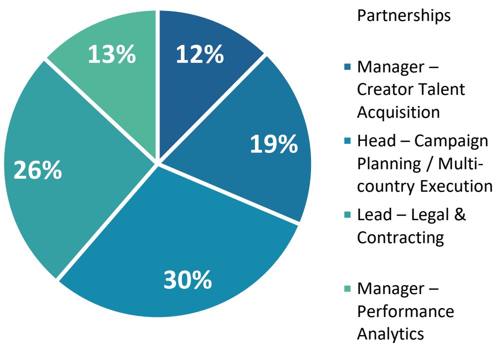
Content Creators



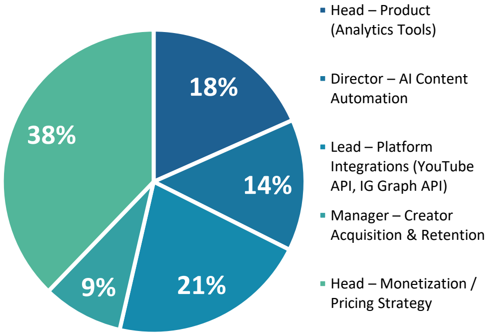
Platforms & Social Media Companies



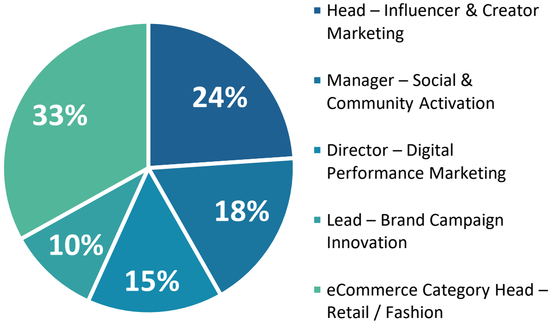
Creator Agencies & Talent Management Firms



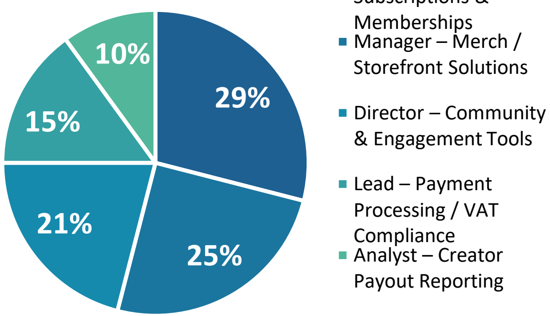
Tools & SaaS Providers



Brand Advertisers & Marketers



eCommerce & Monetization Platforms



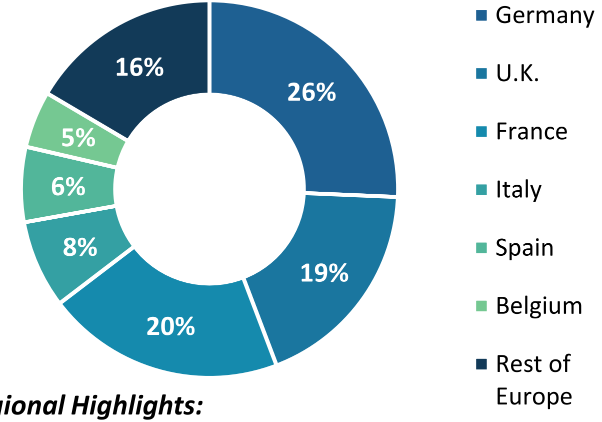
Note: This covers 80% of the primary respondents, rest 20% is from other categories

PRIMARY RESEARCH: ENTITIES TO WHOM WE SPOKE (5/5)

Key Takeaways

- ***Comprehensive Ecosystem Coverage:*** *Interviews spanned the full creator ecosystem including creators (micro to mega), platforms (Instagram, TikTok, YouTube, Twitch), creator agencies, SaaS/analytics providers, eCommerce/monetization platforms (Patreon, Substack, Ko-fi), advertisers, and brand marketers ensuring complete ecosystem visibility across Europe.*
- ***Digital Platform–Centric Insights:*** *Nearly 54% of respondents represented social media, video, streaming, and podcast platforms, providing deep insights into algorithm changes, content ranking systems, monetization features, payout programs, and EU compliance (GDPR, DSA, DMA) driving platform behavior.*
- ***Creator & Brand-Centric Perspectives:*** *Approximately 42% of interviews involved creators and brands, offering granular insights into sponsorship pricing, category-specific performance (beauty, gaming, lifestyle, fashion), conversion benchmarks, consumer influence patterns, and European audience maturity.*
- ***Tools, SaaS, and AI Innovation Trends:*** *SaaS providers, creator tools, and AI startups highlighted accelerating adoption of AI-driven editing, automation, analytics, and personalization, with strong traction among small and mid-tier creators. Platforms emphasized innovations in creator dashboards, revenue-share models, transparency, and real-time analytics.*
- ***Regulatory & Policy Alignment Across Europe:*** *Industry experts and platform policy teams highlighted the growing impact of GDPR, Digital Services Act (DSA), and Digital Markets Act (DMA) on transparency, content moderation, advertising disclosures, algorithmic accountability, and data protection reshaping platform–creator collaboration.*

Interview Coverage by Country



Key Regional Highlights:

- ***France:*** *High adoption of fashion, beauty, culture, and lifestyle creators. Paris is central to luxury brand collaborations, creator agencies, and strong livestream shopping traction. France also leads in platform compliance and policy evolution (GDPR, DSA enforcement).*
- ***U.K.*** *–A mature creator ecosystem with strong presence across lifestyle, beauty, gaming, finance, and education creators. London acts as a major hub for influencer agencies, brand advertisers, creator-tech startups, and platform regional headquarters.*

SECONDARY RESEARCH & PAID DATABASES

- Which sources we referred to for doing desk research
- Which paid databases we have access to gather the authentic data

SECONDARY RESEARCH: CREDIBLE SOURCES TO GATHER MARKET DATA

Government & Public Sector Sources

- European Audiovisual Observatory
- European Commission (EC) – Digital Markets, Media & Content Units
- Eurostat – Digital Economy, Media Consumption, Internet Usage
- UK: Department for Digital, Culture, Media & Sport (DCMS)
- France: Ministry of Culture / ARCOM
- Germany: Federal Ministry for Digital & Transport
- EU GDPR Supervisory Authorities
- Others

Academic & Technical Literature

- EU Digital Economy & Society (DESI) Reports
- Academic journals on media, communication, digital labor & creator economy
- OECD Digital Economy Papers
- UNESCO Digital Content & Cultural Consumption Reports
- Others

Industry Associations & Councils

- IAB Europe (Interactive Advertising Bureau Europe)
- EGTA (European Association of TV & Radio Sales Houses)
- EASA (European Advertising Standards Alliance)
- EBU (European Broadcasting Union)
- Influencer Marketing Hub (EU-specific research)
- Podcast Industry Europe / Acast Insights
- European Interactive Digital Advertising Alliance (EDAA)
- Other

Magazines & Market Publications

- WARC Europe – Media & Creator Insights
- eMarketer / Insider Intelligence – Europe Digital & Creator Trends
- The Drum (UK & Europe)
- Campaign Europe
- Marketing Week
- Social Media Today – Europe Insights
- TechCrunch Europe
- Digital Information World
- Others

Regulatory & Certification Bodies

- European Data Protection Board (EDPB) – GDPR Guidelines
- European Commission – Digital Services Act (DSA)
- European Commission – Digital Markets Act (DMA)
- National Privacy Regulators (CNIL France, ICO UK, BfDI Germany, AEPD Spain, Garante Italy)
- EU Intellectual Property Office (EUIPO) – Copyright & Content Rights
- Others

Company / Vendor Sources

- Annual Reports
- SEC Filings Documents
- Press Releases
- Investor Decks
- Earnings transcripts, investor presentations & transparency reports
- Market filings, platform developer documentation & monetization updates
- Other Company reports

PAID DATABASES: ENABLING TRIANGULATION OF COMPETITOR & COMPANY DATA (1/3)

COHERENT MARKET INSIGHTS

Database Name	Function / Description	Use Cases	What We Derive
Statista Europe	Market, media, consumer, and digital usage datasets across European countries.	Tracking platform penetration, creator adoption, time-spent trends, and category-level content demand.	Consumer adoption benchmarks; Platform-wise usage metrics; Content category growth; Market trend validation
GWI (GlobalWebIndex)	Audience behavior, creator engagement, and social media consumption insights.	Mapping creator–audience interaction patterns, motivation drivers, platform preferences.	Engagement benchmarks; Creator demographic profiling; Audience segmentation
SimilarWeb	Website traffic, creator platform reach, market share, and web behavioral data.	Validating platform competitiveness, web traffic of creator tools, and ecosystem maturity.	Platform share metrics; Traffic validation; Competitive insights
App Annie / Data.ai	Mobile app analytics, DAUs/MAUs, retention, and usage metrics for creator platforms and tools.	Assessing mobile usage patterns for TikTok, YouTube, Twitch, Patreon, Substack, etc.	App growth metrics; Retention insights; Feature adoption analysis
SensorTower	App performance, downloads, monetization metrics, and category rankings.	Mapping creator-tool adoption (editing apps, analytics apps), platform monetization.	App install trends; Regional adoption splits; Monetization intelligence
HypeAuditor	Influencer analytics, authenticity scores, engagement rate benchmarking.	Pricing benchmarks for creators, detecting fake followers, category-wise performance.	Authenticity validation; Engagement KPIs; Creator benchmarking
CreatorIQ	Creator campaign analytics, influencer performance dashboards, ROI metrics.	Tracking brand collaborations, campaign results, cross-platform creator evaluation.	Campaign ROI; Brand performance benchmarks; Creator scorecards

PAID DATABASES: ENABLING TRIANGULATION OF COMPETITOR & COMPANY DATA (2/3)

Database Name	Function / Description	Use Cases	What We Derive
Aspire	Influencer marketing platform for campaign data, creator pricing, brand selections.	Mapping brand–creator collaboration patterns and pricing models.	Sponsorship pricing; Category KPI norms; Collaboration volume
Upfluence	Influencer discovery, analytics, and compensation insights.	Identifying creator segments, affiliate performance, content value mapping.	Affiliate metrics; Payout benchmarks; Engagement insights
Crunchbase	Funding, acquisitions, and startup ecosystem insights for creator-tech firms.	Mapping investments in creator SaaS, editing tools, monetization platforms.	Startup landscape; Funding rounds; Valuation trends
PitchBook	Deep financials, investor intelligence, private company valuation datasets.	Validating European VC investments in creator economy & SaaS.	Valuation benchmarking; Investor mapping; Exit landscape
Tracxn Europe	Creator-tech, influencer agencies, and SaaS company listings with funding details.	Competitor screening, identifying emerging creator startups.	Company universe mapping; Competitive landscaping
Sprout Social	Social analytics, brand–creator sentiment tracking, market trends.	Tracking sentiment trends around creators, category heatmaps.	Sentiment analysis; Trend forecasting
Brandwatch	Social listening, cultural trend analysis, creator conversation tracking.	Validating niche creator categories & audience mood.	Conversation sentiment; Category buzz analysis

PAID DATABASES: ENABLING TRIANGULATION OF COMPETITOR & COMPANY DATA (3/3)

Database Name	Function / Description	Use Cases	What We Derive
Orbis Europe (Bureau van Dijk)	Financial statements, ownership structure, M&A data for agencies/platforms.	Validating agency revenues, ownership, profitability.	Company financial validation; M&A mapping
WARC Europe	Advertising spend, influencer market forecasts, category-wise pricing.	Validating brand spending on influencer marketing & CPM/CPE benchmarks.	Ad spend validation; ROI norms
eMarketer (Insider Intelligence)	Europe-focused digital media & creator economy data forecasts.	Cross-checking market size, platform growth & creator monetization trends.	Regional digital forecasts; Creator economy projections
NielsenIQ	Consumer behavior, content influence analytics, brand lift studies.	Validating how creators impact purchase decisions.	Brand lift metrics; Conversion drivers
Kantar Media	Campaign effectiveness, media tracking, consumer panels.	Measuring multi-country influencer campaign results.	European audience attribution; ROI measurement

DATA TRIANGULATION FRAMEWORK

- Factor considered for market estimation and forecast
- Cross-linkage between value chain to track the market

MARKET ESTIMATION & FORECAST: PARAMETERS CONSIDERED (1/2)

COHERENT MARKET INSIGHTS

Estimation Parameters (Base Year, 2024)

Parameters	Description	Weightage (%)
Creator Population & Active Creator Base (by Tier & Category)	Total number of creators across micro, mid-tier, macro, and mega tiers segmented by categories such as lifestyle, beauty, gaming, music, sports, education, etc. Establishes foundational market size and content supply intensity.	**22%**
Platform Usage & Engagement Metrics (Social, Video, Streaming, Podcasts)	DAUs/MAUs, watch time, engagement rates, session duration, follower growth, and content consumption patterns across Instagram, TikTok, YouTube, Twitch, Spotify, etc.	**18%**
Brand Spending on Creator Collaborations (Influencer Marketing Spend)	Total brand expenditure on influencer marketing across sectors (beauty, fashion, gaming, retail, tech, travel). Includes sponsorship campaigns, paid partnerships, and performance-based collaborations. Validated by WARC, eMarketer, brand interviews.	**15%**
Monetization Streams & Revenue Per Creator	Revenue generated by creators through ads, subscriptions, merchandise, affiliate marketing, brand deals, tips, paid communities, courses, etc. Includes platform revenue-share trends and creator earnings benchmarks.	**15%**

MARKET ESTIMATION & FORECAST: PARAMETERS CONSIDERED (2/2)

COHERENT MARKET INSIGHTS

Estimation Parameters (Base Year, 2024)

Parameters	Description	Weightage (%)
Consumer Adoption & Purchase Influence Metrics	Conversion from creator-driven promotions, purchasing behavior influenced by creators, category-wise conversion rates, and audience trust scores. Derived from surveys, GWI, Nielsen, Kantar.	**12%**
Platform Monetization Payouts & Take-Rate Structures	Creator payouts, platform take-rates, regional payout variations (YouTube Partner Program, TikTok Creator Rewards, Twitch subs/bits, Spotify/Podcast monetization). Establishes platform-driven revenue flows.	**10%**
Creator Tools, SaaS & AI Adoption (Editing, Analytics, CRM)	Adoption rate of creator technology (AI editing tools, analytics SaaS, automation software), subscription spend trends, and tool usage patterns across creator tiers.	**8%**

DATA TRIANGULATION : CONNECTING THE DOTS…

COHERENT MARKET INSIGHTS

Entity	Key Data Captured	Cross-Linkages (How It Connects with other entities)	Outcome / Validation Achieved
1 Content Creators	• Earnings mix (ads, sponsorships, subscriptions, affiliate, merch, tips); • Engagement metrics (views, watch-time, CTR, conversion); • Category performance (beauty, gaming, lifestyle, education); • Pricing norms (CPM, CPE, CPC); Tool usage (editing, AI tools, analytics).	• Links with Platforms to validate payouts & engagement; • Links with Agencies to benchmark pricing; • Links with Brands to confirm conversion metrics; • Links with SaaS tools for workflow validation.	• Validated creator income benchmarks; • Cross-check of category engagement; • Pricing structure accuracy; • Confirmation of collaboration maturity.
2 Platforms & Social Media Companies	• DAUs/MAUs, session duration, algorithmic distribution, content consumption trends; • Monetization programs; Take-rates & payout structures; • Regional performance variations.	• Links with Creators for earnings validation; • Links with Agencies for campaign outcomes; • Links with SaaS for analytics integration; • Links with Regulators for DSA/GDPR impact.	• Validation of platform growth; • Benchmarking monetization maturity; • Market sizing accuracy; • Revenue distribution across platforms.
3 SaaS, Tools & AI Providers	• Adoption trends, retention rates, feature usage, AI-assisted workflows, subscription spend patterns	• Links with Creators for workflow adoption; • Links with Agencies for analytics demand; Links with Platforms for API alignment; • Links with Investors for innovation cycles.	• Validation of tool adoption; • Mapping of AI-driven efficiency; • Creator-tech submarket accuracy; • Confirmation of productivity trends.
4 End-Users / Consumers	• Creator influence on purchasing, category triggers, trust indicators, content format preference across EU markets	• Links with Brands for ROI verification; • Links with Platforms for consumption intensity; • Links with Creators for category resonance; • Links with Agencies for targeting validation.	• Validation of consumer-driven creator impact; • Demand-side confirmation of market size; • Regional segmentation insights; • Accurate purchase-influence modeling.

COHERENT MARKET INSIGHTS

APPENDIX

- Covering some actual datapoints collected from key stakeholders across the value chain

COMPANIES INTERVIEWED ACROSS VALUE CHAIN (1/5)

Whom We Interviewed	Company Name & Designation	What Datasets We Received	Example Use Case
Platforms & Social Media Companies	Meta (Instagram & Facebook) – Head of Creator Partnerships, Europe	Creator monetization adoption rates across EU; Reels watch-time and engagement patterns; Branded content performance metrics across beauty, fashion, fitness, and entertainment.	Meta shared insights showing 31% YoY increase in Reels-based brand collaborations driven by beauty, fitness, and lifestyle creators across Western Europe.
	TikTok Europe – Manager, Creator Solutions	Short-form video engagement trends by country; Creator Rewards payouts distribution; Vertical performance data for gaming, skincare, fashion.	TikTok reported higher conversion rates (3.8–5.2%) in France and the UK for beauty creators running TikTok Shop campaigns.
	YouTube EMEA – Director, Content & Creator Monetization	YouTube Partner Program revenue splits; Long-form vs Shorts engagement; RPM benchmarks for education, gaming, tech, and music creators.	YouTube validated that gaming creators in Germany show 22% higher RPM than the EU average due to longer watch durations.
	Spotify Europe – Lead, Creator Monetization	Listener demographics for creator-led podcasts; Subscription and ad revenue splits; Category performance across news, comedy, education, lifestyle.	Spotify data showed education and business podcasters in the Nordics recording the highest subscriber conversion rates (6–9%).

COMPANIES INTERVIEWED ACROSS VALUE CHAIN (2/5)

Whom We Interviewed	Company Name & Designation	What Datasets We Received	Example Use Case
Platforms & Social Media Companies	Twitch Europe – Head of Creator Growth	Livestream watch-hours by category; Subscriptions and Bits payouts; Growth trends among EU streaming-first creators.	Twitch highlighted a 27% YoY surge in music livestream creators in Italy and Spain, driven by independent artists using subs/donations.
	Others		

COMPANIES INTERVIEWED ACROSS VALUE CHAIN (3/5)

COHERENT MARKET INSIGHTS

Whom We Interviewed	Company Name & Designation	What Datasets We Received	Example Use Case
SaaS, Tools & AI Providers	Canva Europe – Head of Product (Creator Tools)	EU creator adoption of design templates; Editing workflow usage; Subscription conversion & retention by tier; AI-assisted creation metrics.	Canva shared that micro-creators in Germany and France have the highest monthly retention (68–72%) due to heavy short-form template usage.
	CapCut EU (ByteDance) – Product Lead, Editing & Effects	Editing tool usage for TikTok/IG; AI auto-cut usage; Regional export trends; Transition & effects usage analytics.	CapCut validated that AI auto-editing usage jumped 41% YoY among creators in Spain and Italy.
	VidIQ – Europe Market Lead, Creator Analytics	YouTube keyword trends; Topic saturation metrics; Growth prediction indexes; Category-wise RPM comparison.	VidIQ confirmed that education creators in the UK and Germany have the highest growth predictability scores.
	TubeBuddy – Regional Head, Europe	YouTube search data; CTR benchmarks; Metadata optimization performance; Regional content ranking behavior.	TubeBuddy shared that thumbnail CTR is 20–25% higher in Nordic countries due to minimalistic visual preferences.

COMPANIES INTERVIEWED ACROSS VALUE CHAIN (4/5)

COHERENT MARKET INSIGHTS

Whom We Interviewed	Company Name & Designation	What Datasets We Received	Example Use Case
SaaS, Tools & AI Providers	Lightricks (Facetune, Videoleap) – Director, Creator Solutions	Editing/retouching feature adoption; Subscription revenues; AI generative effects usage; Regional purchasing trends.	Lightricks indicated that Italy shows the fastest paid-user growth for AI editing tools among beauty & fashion creators.
	Hootsuite – Senior Manager, Social Analytics (Europe)	Scheduling behavior; Optimal posting times; Cross-platform analytics; Engagement uplift from automation.	Hootsuite validated that creators in the UK achieve 18–21% higher engagement when using optimized scheduling windows.
	Notion AI – EU Product Partnerships Lead	AI workflow automation adoption; Script-writing template usage; Regional productivity variations; Subscription churn & renewal trends.	Notion AI reported that education & productivity creators in Germany have the highest script-generation usage.
	Descript – Head of EU Creator Solutions	Podcast/video editing workflows; AI transcription adoption; Export-to-platform behavior; Time saved using AI editing.	Descript confirmed podcasters in the UK and Netherlands save up to 45% editing time with AI overdub and transcript tools.

COMPANIES INTERVIEWED ACROSS VALUE CHAIN (5/5)

Whom We Interviewed	Company Name & Designation	What Datasets We Received	Example Use Case
Brands & Advertisers	L’Oréal Europe – Director, Digital & Influencer Marketing	Creator category performance (skincare, cosmetics, haircare); EU influencer budget allocation & ROI benchmarks; Sentiment lift & conversion impact; Cross-country campaign metrics.	L’Oréal validated that mid-tier creators deliver the highest ROI (3.1–3.6x) in skincare campaigns across France and the UK.
	Zalando – Head of Social Commerce	Creator-driven traffic & purchase funnel metrics; Sell-through rates; Category uplift (footwear, apparel, accessories); Attribution data from TikTok & IG collaborations.	Zalando reported that creator-led fashion drops improved conversion by 22–28% in Germany and the Nordics.
	Adidas Europe – Influencer Partnerships Lead	Sport & lifestyle creator performance metrics; Engagement benchmarks for Reels/Shorts/TikTok; Campaign reach vs ROI data; Country-level engagement trends.	Adidas confirmed that fitness creators in Spain generated the highest Reels engagement (8–11%) in EU markets.
	Samsung Europe – Head of Content Partnerships	Tech/gadget creator metrics (unboxings, reviews); CTR & purchase intent uplift; Multi-platform performance analytics.	Samsung shared that YouTube tech creators in the UK drive 2.4x higher purchase intent for premium smartphones.

ABOUT US

ABOUT US

COHERENT MARKET INSIGHTS

- Starting as a Strategic Intelligence Firm, we are now **an integrated firm offering Strategic Intelligence Services and Digital Transformation Services.** As a track record, we are empowering organizations to make data-driven decisions, drive innovation, and stay competitive in dynamic markets
- With a unique blend of high-quality **strategic research and cutting-edge technology services**, we deliver actionable insights and drive impactful digital transformation journeys for global enterprises

- Effective **use of technology** to automate management of large and complex market data
- Exceptional synergies between **consulting and technology domains**
- Proprietary market intelligence for more than **5,000 micro markets**
- Address changing customer needs by capitalizing on skills base

- **Strategic Intelligence Services-** Delivering actionable insights through **comprehensive market research, competitive intelligence**, and trend analysis to inform strategic decisions and identify growth opportunities
- **Digital Transformation Services-** Accelerating innovation with **technology solutions, process automation,** and cloud-native platforms to drive seamless digital journeys and business agility

- Over **50%** of our clients are global **Fortune 500 leaders**
- Serving **200+ enterprise accounts**, each with annual revenues exceeding USD 1 billion
- Multi-lingual capabilities and partnerships with **150+ local research and technology agencies** worldwide

COHERENT MARKET INSIGHTS: SERVICE CAPABILITIES

CMI's SERVICE CAPABILITIES ARE BROADLY CATEGORIZED INTO TWO SERVICE STREAMS

STRATEGIC INTELLIGENCE SERVICES

- Demand Analysis & Forecasting
- Pricing Intelligence
- Competitive Intelligence
- Go-to-Market Strategy & Positioning
- Distributor and Customer Intelligence
- Procurement Intelligence
- Trade Intelligence (Exports, Imports, Local Capacity, Throughput)
- Sales Acceleration Engagement

DIGITAL TRANSFORMATION SERVICES

TECHNOLOGY SERVICES

- Digital Strategy Development
- Technology Assessment and Roadmap Planning
- Business Process Optimization
- Cloud Migration Services
- Application Development and Modernization
- Data Analytics and Insights
- Artificial Intelligence (AI) and Machine Learning Solutions
- Cybersecurity Solutions
- Change Management and Training
- Agile Transformation and Enterprise Mobility Solutions

CORE PRODUCT DEVELOPMENT & APPLICATION SERVICES

- Product Ideation & Strategy
- UI/UX Design & Prototyping
- Custom Web & Mobile Application Development
- MVP Development & Iterative Scaling
- AI & ML-powered Feature Integration
- Testing, Quality Assurance & Continuous Delivery
- Maintenance, Support & Growth Enablement

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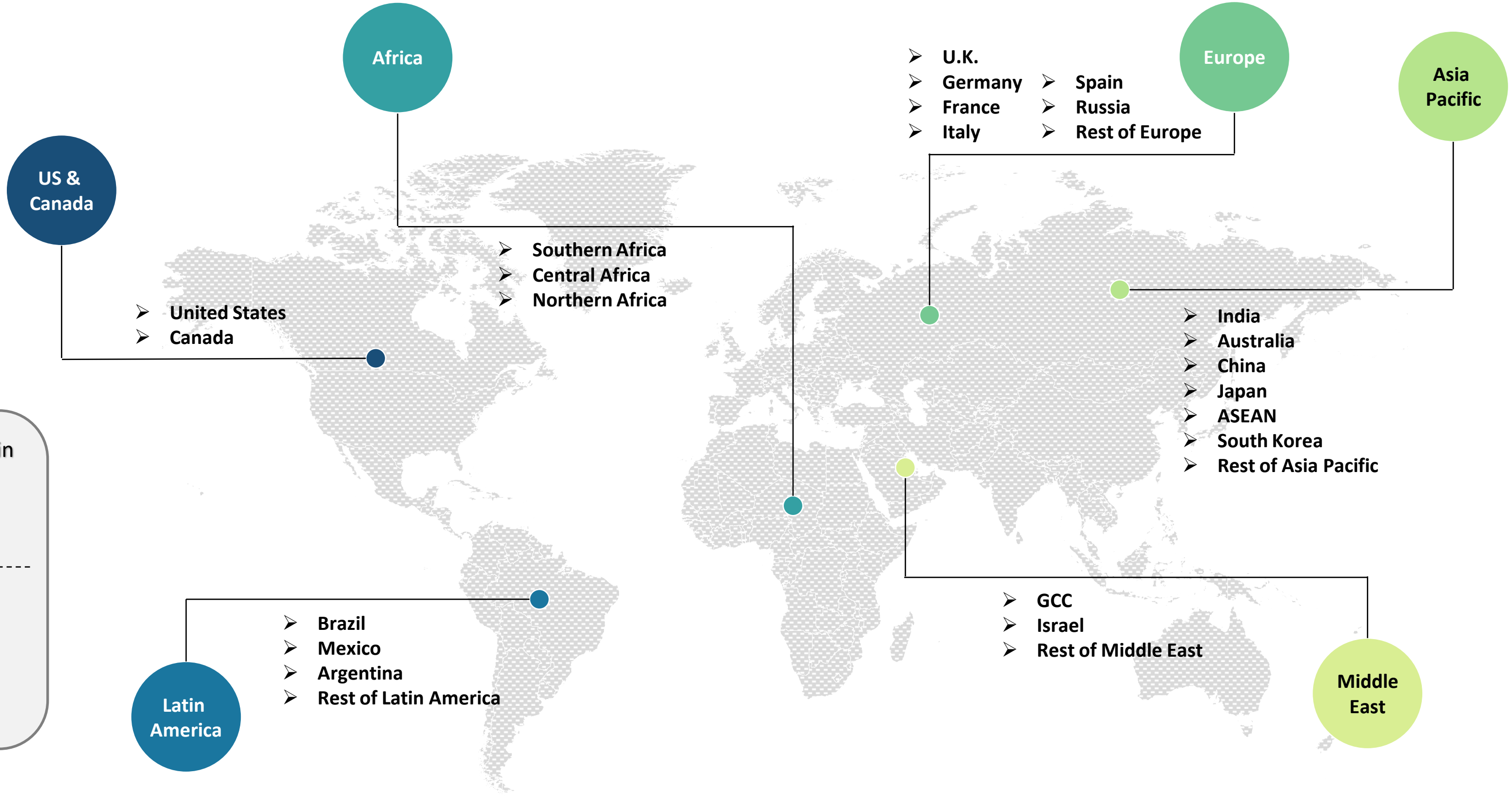
COHERENT MARKET INSIGHTS: MARKET PRESENCE



CMI market coverage in

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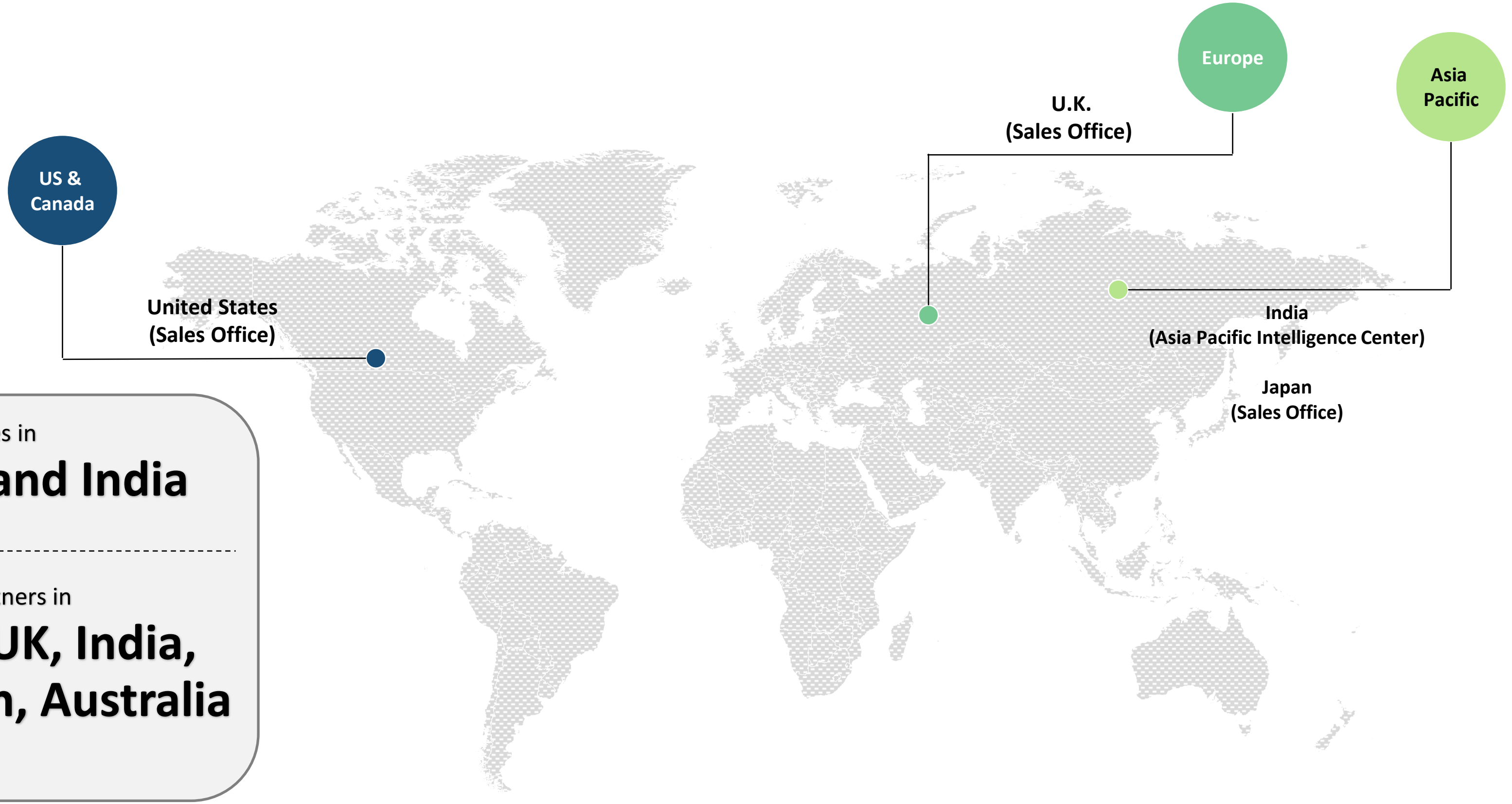
150+

Empaneled contract consultants across the globe

COHERENT MARKET INSIGHTS: OFFICES

COHERENT MARKET INSIGHTS



CMI Offices in

U.S, and India

Client Partners in

U.S, UK, India, Japan, Australia

CMI's GROWTH SO FAR...

COHERENT MARKET INSIGHTS

KEY STATS

1,500+
Insights Published Per Year

6,200+
Consulting Projects Till Date

5,000+
Clients Worldwide

450+
Analysts and Contract Consultants

RESEARCH PRODUCTS

- CONSULTING PROJECTS
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- MARKET REPORTS
- COUNTRY ANALYSIS
- CUSTOMIZED PRODUCTS
- COMPETITIVE ASSESSMENT
- EXCEL FORECAST DATABASE
- FUTURE OUTLOOK/FORECAST

We excels at offering unmatched actionable market intelligence across various industry verticals. We implement holistic market research methodology in order to result in the best possible market research reports across various industries worldwide. Based on our unmatched expertise across various industries no matter how large or small, how complex or unique we help our clients achieve better outcomes with uniquely designed and highly customized solutions. Our coverage includes insights that help our clients ensure sustained growth in developed markets and also key inputs to help them tap into emerging markets and exploit the plethora of opportunities posed therein.

COHERENT MARKET INSIGHTS

THANK YOU

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