

REMINDER ALL CATEGORIES - KEY CONSUMER DRIVERS IN FRANCE

19%

OF TOTAL CONVERSATION

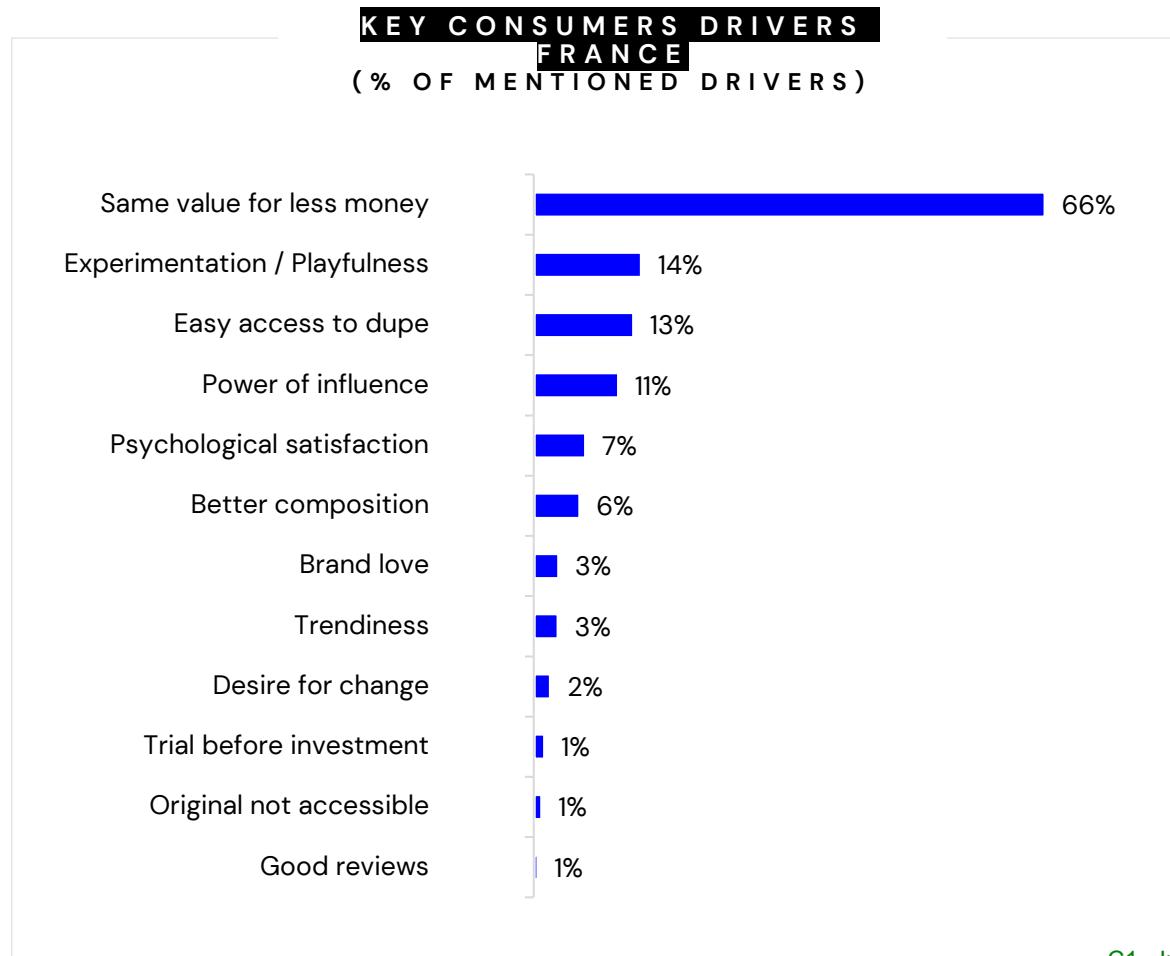


WHAT ARE THE REASONS FOR CONSUMERS TO CHOOSE A DUPE OVER THE ORIGINAL PRODUCT?

IN FRANCE, THE PRIORITY IS FINDING THE SAME VALUE FOR LESS MONEY PERCEPTION, FAR AHEAD OF OTHER REASONS.

OTHER REASONS INCLUDE:

- WILLINGNESS TO EXPERIMENT (TRY PRODUCTS AND COLLECT)
- ACCESSIBILITY OF THE DUPE (EASY ACCESS TO DUPE IN FAVORITE LOW COST RETAILERS)
- POWER OF INFLUENCE (ALLOWING TO CHANGE POINT OF VIEW ON DUPES)
- BETTER COMPOSITION (CHOOSING A DUPE BECAUSE THE ORIGINAL HAS A POOR COMPOSITION)



APPROXIMATELY SAME VALUE FOR LESS MONEY

“ La base hydratante de Bobbi Brown !! Ça coûte chère mais elle est incroyable mais si vous cherchez son dupe celui de Primark est très bien aussi ! ”

EXPERIMENTATION. COLLECTION & PSYCHOLOGICAL SATISFACTION

“ J'adore changer de parfum. le choisir chaque matin en fonction de mon humeur... Mais on ne va pas se mentir c'est un budget! Alors quand je trouve de bons dupes. je suis très heureuse! ”

EASY ACCESS TO DUPE

“ On parle d'un parfum à 300€ la bouteille là que tu trouves pas en magasin. Après j'habite pas à Paris au milieu des bobos. Va sur Vinted. ta 30000 dupes à 50€. ”

POWER OF INFLUENCE LEADING TO CHANGING HABITS

“ Hier on m'en a parler on m'a dit c'est des dupes de parfum de luxe avant j'aurais fais des chichi « ah non lidl patati patata » mais mdr 4€ au lieu de 100 pour la MÊME odeur 🤪🤪🤪 ”

BETTER COMPOSITION

“ J'avais eu "My Way" de Armani en échantillon et gros coup de coeur. Sauf que il est noté "mauvais" sur Yuka. avec 2 perturbateurs endocriniens. Je me demande vers où me tourner pour avoir des parfums "safe" mais quand même sympa (si vous avez un dupe safe de my way je prend haha) ”

BRAND LOVE

“ Petite vidéo de présentation d'une marque que j'utilise depuis des années et que J'ADORE, il s'agit parfumsstar.. Super ALTERNATIVE pour avoir des DUPES de grandes marques à des prix supers intéressants ! . ”

TRENDINESS

“ J'me suis laissé tenté par la hype du blush de primark et franchement un vrai dupe du rare Beauty, j'aime troooop ”

REMINDER ALL CATEGORIES- KEY CONSUMER BARRIERS IN THE US

6%

OF TOTAL CONVERSATION



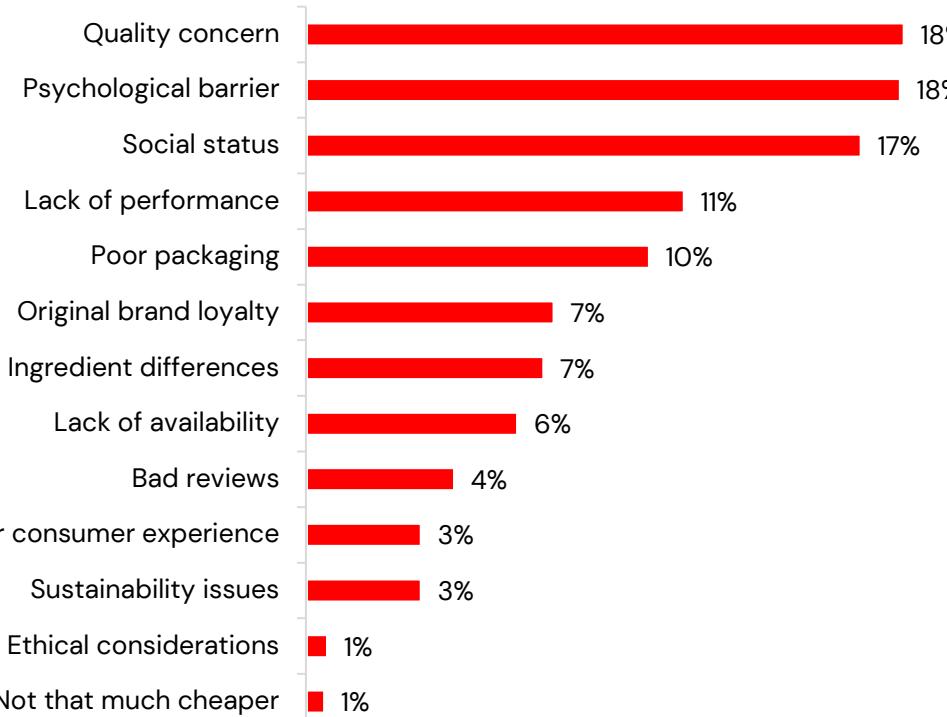
WHAT ARE THE REASONS FOR CONSUMERS NOT TO ADOPT A DUPE OVER THE ORIGINAL PRODUCT?

US CONSUMERS ARE MORE RELUCTANT TO PURCHASE DUPES FOR THE FOLLOWING REASONS:

- **QUALITY CONCERN AS #1**
- **PSYCHOLOGICAL SATISFACTION** NOT TO YIELD TO CHEAPER OPTIONS
- **THE SOCIAL STATUS** BROUGHT BY ORIGINAL PRESTIGIOUS BRAND
- **LACK OF SIMILARITY** IN TERMS OF PERFORMANCE. PACKAGING AND INGREDIENTS LISTS

US CONSUMERS TEND TO BE **MORE LOYAL TO ORIGINAL BRANDS**. EXPRESSING MORE BRAND LOVE IN GENERAL.

KEY CONSUMERS BARRIERS
US
(% OF MENTIONED BARRIERS)



QUALITY & SAFETY

“ As someone who has also tried what feels like ALL the sunscreens. I always come back to Supergoop! Matte mineral sunscreen. I broke out trying the Trader Joe's and Elf Supergoop dupes. and have experienced a lot of the same issues you described but the matte mineral never fails me!

PSYCHOLOGICAL BARRIER: MISSING BRAND DNA

“ I agree on what you said. I also value the idea. the concept behind a scent and the history of the brand; all of this cannot be offered elsewhere but at the source. I prefer not buying something rather than getting a dupe/clone. same as with clothing

SOCIAL STATUS: THE EXPERIENCE OF LUXE

“ I started buying more quality makeup when I decided to bite the bullet and pay the price for a makeup by mario soft pop plumping veil blush that I've been drooling over. Ever since then. I realized how much I loved the experience of wearing my luxury items and stopped wasting money on drugstore dupes.

LACK OF PERFORMANCE

“ I tried the makeup revolution dupe and it was not the same even close

POOR PACKAGING

“ The whole clip was me trying to make an Unboxing /first impression video of this lip balm in excitement as they're being claimed to be a RHODE's dupe. 😱 Who knew that I was going to dislike them so much. These really have to be the worst lip balm I have ever tried. 💋 The packaging is cute but cheaply built the applicator broke in two minutes if opening the lip balm.

REMINDER ALL CATEGORIES - KEY CONSUMER BARRIERS IN FRANCE

WHAT ARE THE REASONS FOR CONSUMERS NOT TO ADOPT A DUPE OVER THE ORIGINAL PRODUCT?

9%
OF TOTAL
CONVERSATION 

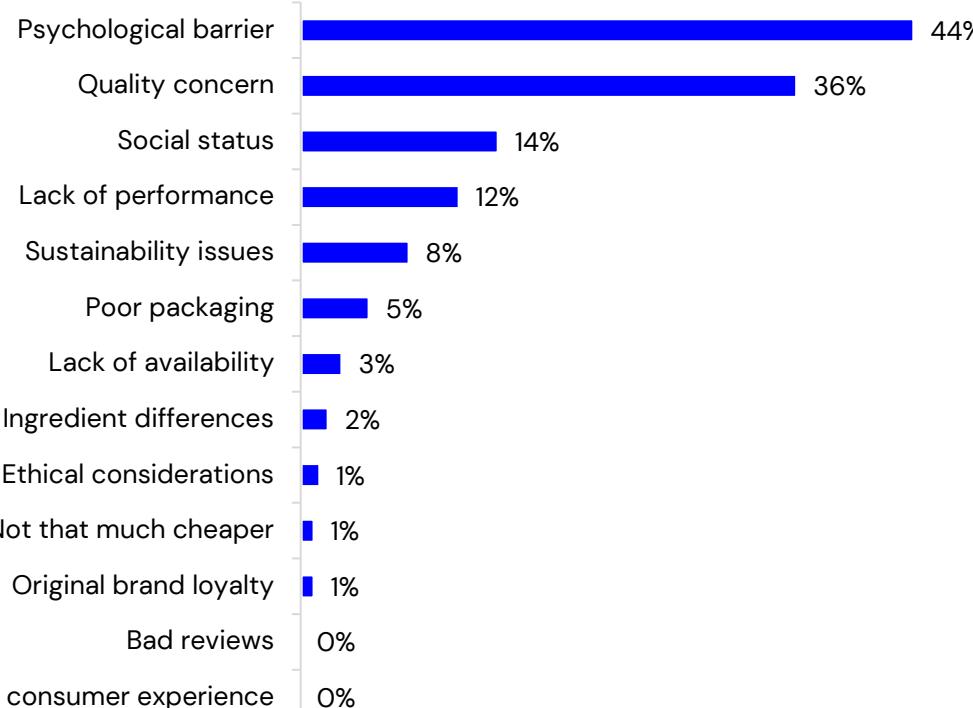
FRENCH CONSUMERS HAVE A STRONGER BIAS NOT TO PURCHASE DUPES. AND EXPRESS MORE SATISFACTION NOT TO YIELD TO CHEAPER PRODUCTS. OFTEN MENTIONING THE VALUE BROUGHT BY THE ORIGINAL CREATOR.

THEY ARE ALSO TWICE AS CONCERNED AS US CONSUMERS ABOUT LOW QUALITY.

WHILE THEY ARE ALSO CONCERNED BY THE LACK OF PERFORMANCE. THE PRIORITY IS ON FORMULA RATHER THAN PACKAGING.

SUSTAINABILITY ISSUES ARE MORE DISCUSSED THAN IN US CONVERSATIONS.

KEY CONSUMERS BARRIERS FRANCE (% OF MENTIONED BARRIERS)



PSYCHOLOGICAL BARRIER: MORAL CONCERN S

“ Oui effectivement je ne parlais pas du point de vu légal mais plutôt moral avec les parfums niche qui coûtent plusieurs centaines d'euros. avec des créateurs qui se cassent la tête pour créer des recettes qui se démarquent et se font copier par des spécialistes des dupes qui eux...

“ On a comme l'impression de se faire voler par les distributeurs !!! Ok pour un bon dupe. ceci dit "acheter un parfum de marque reste la seule et unique façon de rémunérer son créateur" comme dit Sarah Bouasse auteure de Par le bout du nez ed. Calmann-Lévy

QUALITY CONCERN

“ Tiens j'ai jamais essayé de dupes . j'en ai un mauvais apriori concernant la qualité je me trompe peut être

SOCIAL STATUS: DUPES ARE FAKES

“ les "dupes". ces produits qui copient parfums. bijoux ou articles de luxe et sont une forme "tolérée" de contrefaçon 😊 Je ne peux m'empêcher de faire le parallèle avec la viande végétale Ces pratiques signent la mort de la création. du beau et du bon

LACK OF PERFORMANCE

“ J'ai voulu faire la moins chère. j'ai acheté l'anti cernes Maybelline soit disant le dupe du Tarte que j'utilise habituellement. Il est vraiment nul. J'ai essayé le fixateur Révolution. il me fait des boutons pourquoi? L'alcool. Je vais rester avec les marques chères.

SUSTAINABILITY ISSUES

“ Les dupes bon marché m'éner�ent un peu. On voit souvent des produits moins chers proposés par des influenceurs. En général. ces alternatives sont moins clean. Les produits de base ne sont déjà pas top. Alors leurs alternatives. c'est pire. Si tu as un budget serré. ne réduis pas la qualité de tous tes cosmétiques. Réduis plutôt la gamme de produits que tu utilises. Sélectionne un produit vraiment bon pour ta peau.

CONCLUSION : CONSUMERS PRIORITIES & BARRIERS WHEN CHOOSING A PERFUME DUPE

**PERFUME IS THE MOST DUPED CATEGORY DUE TO THE BENEFIT
"SAME SCENT FOR MUCH CHEAPER"**

#1

WHEN PURCHASING PERFUME DUPES, THE CONSUMERS' KEY PRIORITY IS OBTAINING THE SAME SCENT FOR LESS MONEY, FAR AHEAD OF ANY OTHER REASON. THE PRICE OF NICHE FRAGRANCE BEING PARTICULARLY HIGH, THE PSYCHOLOGICAL SATISFACTION LINKED TO FINDING A SMART WAY TO SPEND LESS IS PARTICULARLY STRONG.



SIMILAR SCENT
PACK INSPIRED BY
ORIGINAL

#2

A LARGE PORTION OF CONSUMERS REALIZE DUPES ARE CLONING HEAD NOTES, AND TEND TO DISAPPOINT IN LASTINGNESS. THIS IS A SACRIFICE THEY ARE USUALLY WILLING TO MAKE.



SIMILAR SCENT.
PRICE.
PACKAGING

#3

CONSUMERS ARE ALSO ATTRACTED BY PEER RECOMMENDATIONS, INCLUDING THEIR FAVORITE INFLUENCERS COMPARING PRODUCTS. VIRAL ORIGINAL PRODUCTS TRIGGER VIRAL DUPES.

#4

WHEN THE ORIGINAL BECOMES VIRAL AND IS NO LONGER AVAILABLE, CONSUMERS ARE ATTRACTED TO DUPES TO REPLACE IT.

#5

CONSUMERS ARE REVIEWING DUPES, RATING THEIR OLFACTIVE LIKENESS TO ORIGINAL. SPECIALIZED WEBSITES ARE TRUSTED SUPPORT TO CHOOSE ALTERNATIVES (IE: FRAGRANTICA).

#6

PACKAGING IS MENTIONED IN LOWER SIGNAL, WHEN THIS ONE LOOKS PARTICULARLY CHEAP.

#7

BETTER COMPOSITION AND ETHICAL CHOICES ARE ALSO DISCUSSED, WITH AN INTERESTING BIAS FROM FRENCH CONSUMERS DEFENDING NICHE CREATORS, REFLECTING THE IMPORTANCE OF SOCIAL STATUS ON THIS CATEGORY.



ORIGINAL LACK
OF AVAILABILITY
DUE TO SUCCESS

“ Alors absolument pas : y'a tj un dupe parfait moins cher (skincare ou makeup). C'est juste plus compliqué pour les parfums pck il faut qu'ils tiennent autant que les + chers ”

KEY BARRIERS OVERREPRESENTED IN PERFUME VS OTHER CATEGORIES INCLUDE: SOCIAL STATUS BROUGHT BY ORIGINAL PRODUCT, PACKAGING DIFFERENCES (ESPECIALLY CHEAP BOTTLES) AND SUSTAINABILITY ISSUES (LESS CLEAN FORMULA).



PART 3: KEY CONSUMER PROFILES

EMPOWER YOUR BRAND

C1 - Internal use

semantiweb

PERFUME TARGETS WITHIN THE DUPE CONVERSATION

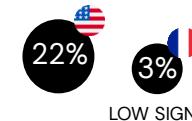
WHILE COST EFFICIENCY REMAINS THE MAIN DRIVER OF DUPE CONVERSATIONS IN BOTH MARKETS, DUPES ARE DEEPLY EMBEDDED IN TREND CULTURE IN THE US, CREATING A VARIETY OF CONSUMER TYPOLOGIES BEYOND AFFORDABILITY—RANGING FROM VIRAL TREND ENGAGEMENT TO EXPERT-DRIVEN EXPLORATION.



FANCY ON A BUDGET



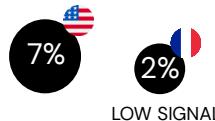
TREND HUNTERS



LAYERING QUEENS



SCENT COLLECTORS



GEN Z TO YOUNGER MILLENNIALS (18-30)

PREDOMINANTLY GEN Z (18-24)

GEN Z TO MILLENNIALS (18-35)

MILLENNIALS TO EARLY GEN X (25-45)



URBAN & SUB-URBAN

URBAN

URBAN & SUB-URBAN

URBAN

AFFORDABILITY
INSPIRATION
DESIRE FOR LUXURY
SELF-CONFIDENCE.

FOMO
CURIOSITY
PLAYFULNESS
TREND ENGAGEMENT

CREATIVITY
EXPERTISE
PERSONALIZATION
INDULGENCE

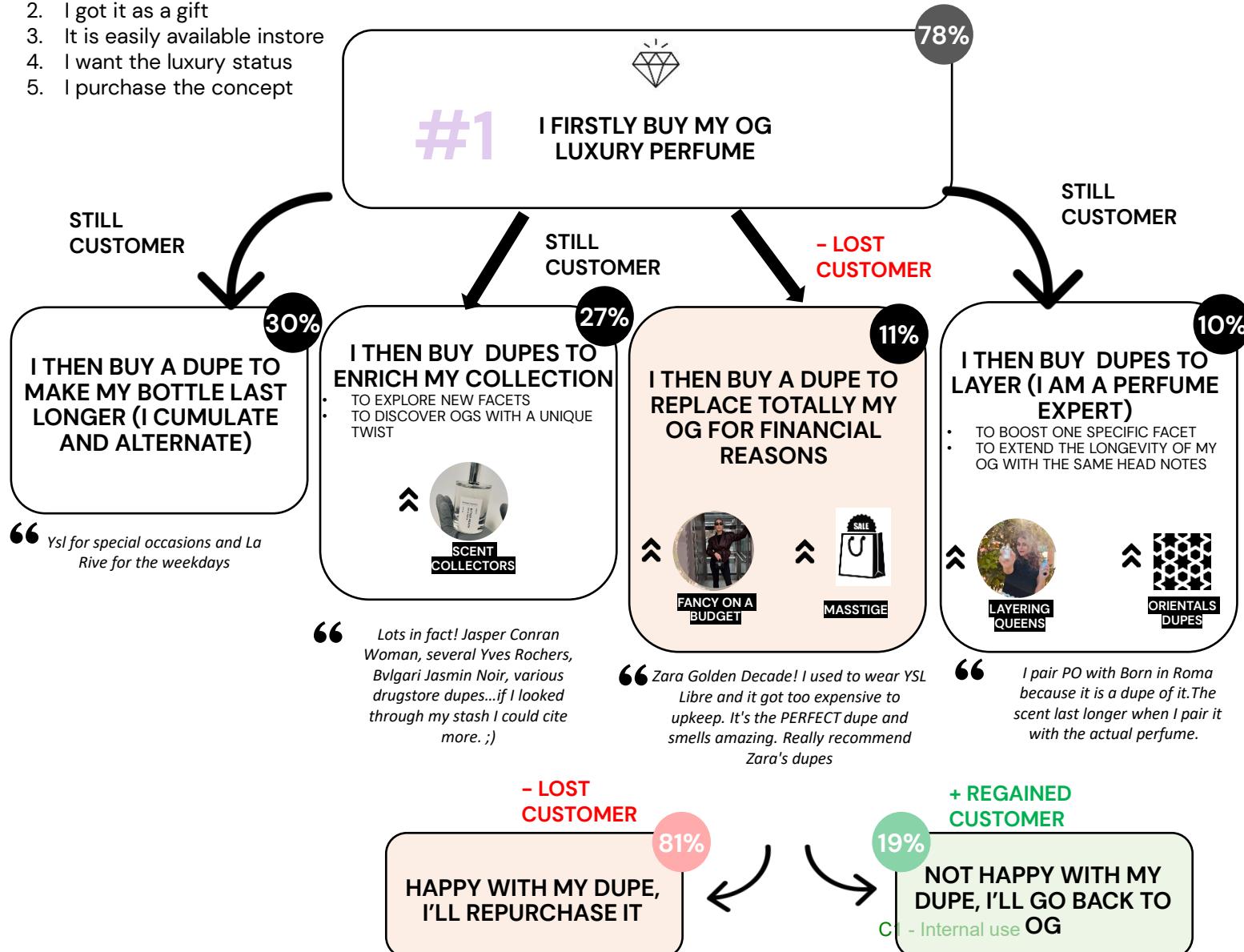
COLLECTION / VARIETY
AFFORDABILITY
OLFACtORY EXPLORATION
NOTE DISCOVERY



DUPE CONSUMER JOURNEYS – MAIN DRIVERS AND ENTRY POINTS

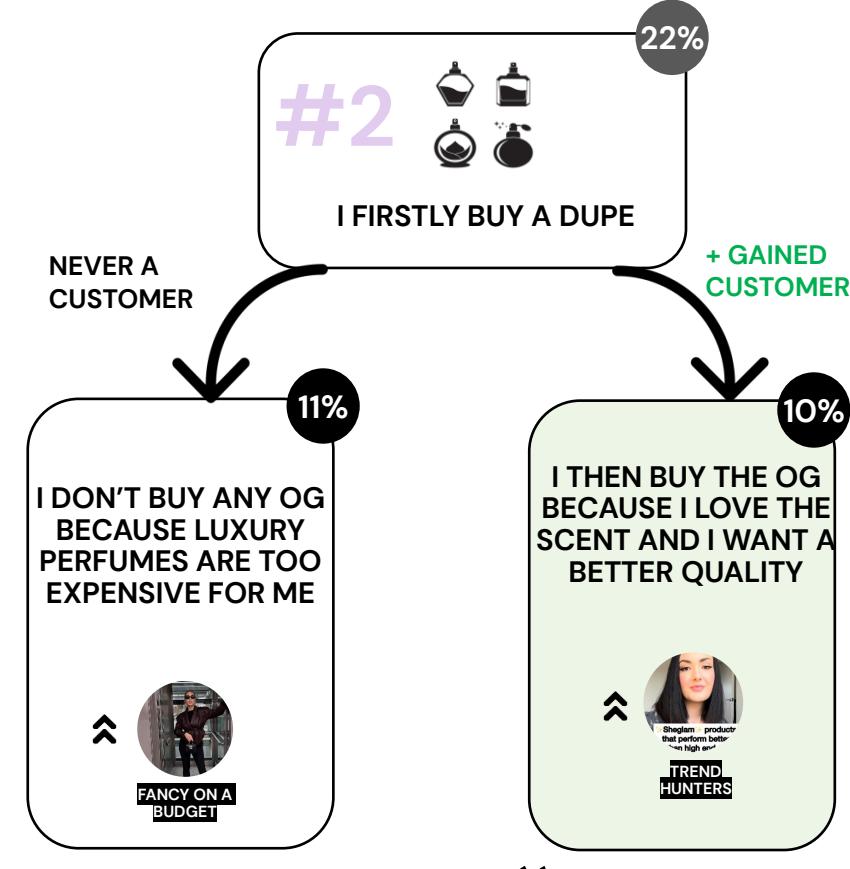
TOP REASONS FOR BUYING THE LUXURY ORIGINAL FIRST?

1. Looking for a perfume → higher awareness (thanks to communication)
2. I got it as a gift
3. It is easily available instore
4. I want the luxury status
5. I purchase the concept



TOP REASONS FOR BUYING THE DUPE FIRST?

1. I am explicitly looking for fragrance for a small budget
2. I wanted the OG but can't afford it and it was recommended as a good dupe by trusted influencers
3. It was viral on social media & I have FOMO



FANCY ON A BUDGET

45%

87%

OF DUPE CONVERSATIONS

In a nutshell

"I use dupes because they let me taste the luxury lifestyle I aspire to without breaking the bank. Dupes help me replicate the look, feel, and vibe of high-end products, letting me feel glamorous and put-together, even on a budget. For me, it's about achieving that 'luxury aesthetic' now while I work towards the real thing in the future."

DRIVERS

- AFFORDABILITY
- ASPIRATION
- DESIRE FOR LUXURY
- SELF-CONFIDENCE.

SOCIO-DEMOGRAPHIC

- GEN Z AND YOUNGER MILLENNIALS (18-30).
- PREDOMINANTLY FEMALE.
- HIGHLY ACTIVE ON TIKTOK AND INSTAGRAM.

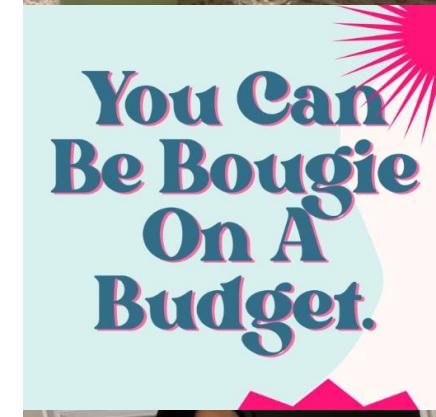
EXPECTATIONS

- LUXURIOUS FINISH
- COMPARABLE PERFORMANCE TO PREMIUM BRANDS AT A FRACTION OF THE COST

CATEGORY AFFINITY

1. FRAGRANCE
2. MAKEUP
3. SKINCARE

“The best accessory a girl can own is CONFIDENCE!
 You don't need to break the bank to look and dress well. Just invest some time to look for the right dupes and you can get that exact same look. Fake it until you make it right?
 Follow for more #luxurylifestyle secrets!



#miimmiicgoddess
#dupelife #highendforless
#glamgoals #luxuryvibes
#bougieonabudget
#fakeittillyoumakeit
#miicmiicqueen

TREND HUNTERS



OF DUPE CONVERSATIONS

In a nutshell

"I use dupes to be part of the latest beauty trends without overcommitting financially. Dupes let me experiment with what's viral and share my discoveries with friends and followers. They help me keep up with the buzz on TikTok while satisfying my curiosity about products everyone's talking about."

DRIVERS

- FOMO
- CURIOSITY
- PLAYFULNESS
- TREND ENGAGEMENT

EXPECTATIONS

- VISIBILITY AND SOCIAL PROOF
- HIGH PERFORMANCE ON TRENDY LOOKS AND SCENTS

SOCIO-DEMOGRAPHIC

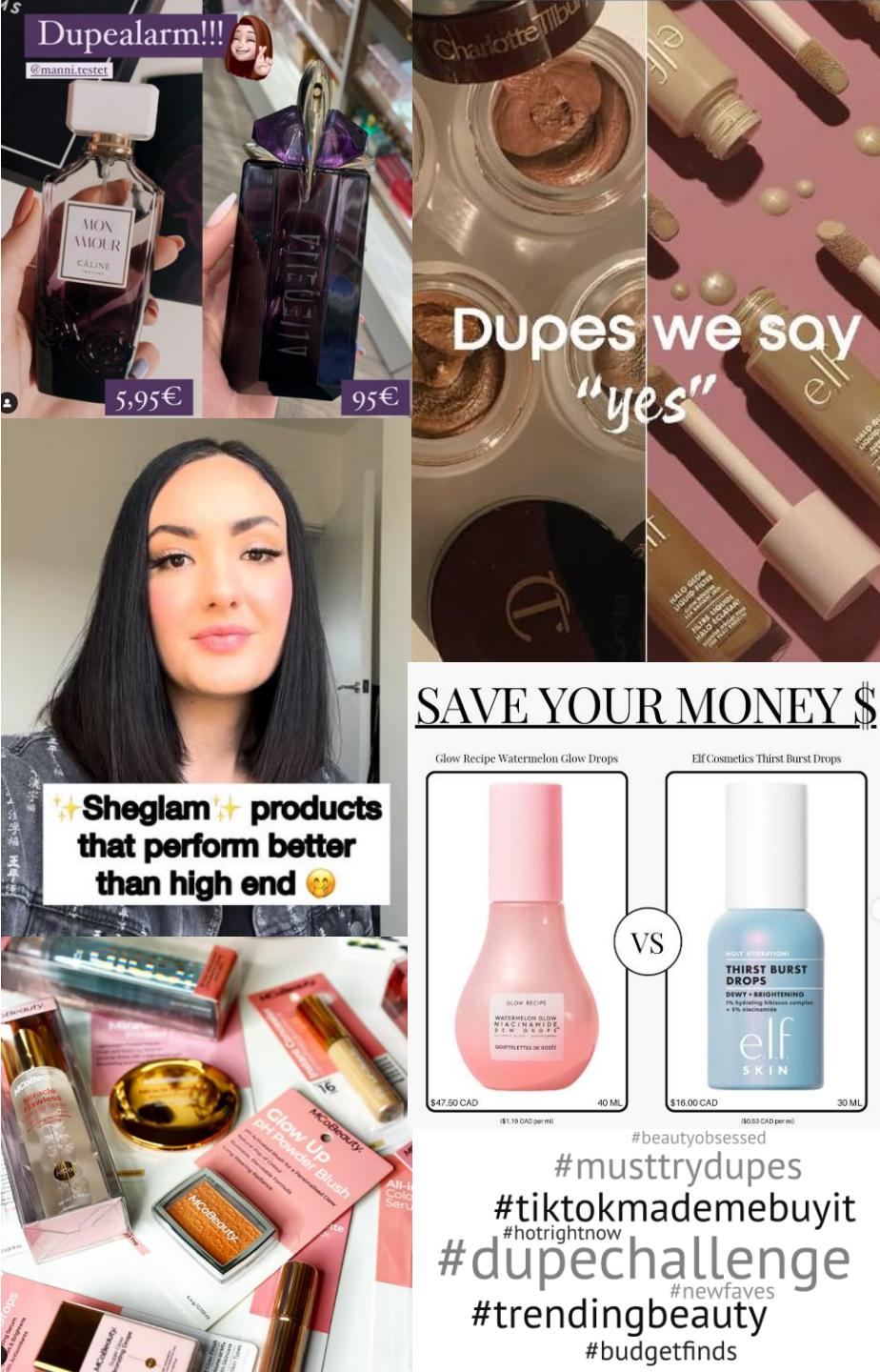
- PREDOMINANTLY GEN Z (18-24).
- HEAVY SOCIAL MEDIA USERS.
- INFLUENCED BY VIRAL CONTENT

CATEGORY AFFINITY

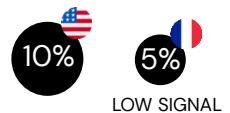
1. MAKEUP
2. FRAGRANCE
3. SKINCARE

“ After months of testing... I FINALLY found a dupe for my beloved @drjart Ceramidin Cream. 🌻 This cream has become one of my holy grails and while this bad boy isn't a perfect texture dupe, it still is incredibly hydrating and occlusive. This gives me an instant glow and leaves me with a dewy, not oily, finish all day. Now I actually get to save some \$ for new products coming out soon.

C1 - Internal use



LAYERING QUEENS



OF DUPE CONVERSATIONS

In a nutshell

"I use dupes to express my creativity and individuality. Whether it's layering fragrances to create my own unique signature scent or combining skincare products for the best result. dupes allow me to explore without the fear of wasting money and allow me to single out ingredients and play with them— Dupes make indulgence affordable and fuel my passion for personalization and discovery.

DRIVERS

- CREATIVITY
- EXPERTISE
- PERSONALIZATION
- INDULGENCE

SOCIO-DEMOGRAPHIC

- GEN Z TO MILLENNIALS (18-35).
- HIGHLY ENGAGED ON TIKTOK WHERE THEY SEEK CREATIVE IDEAS.

EXPECTATIONS

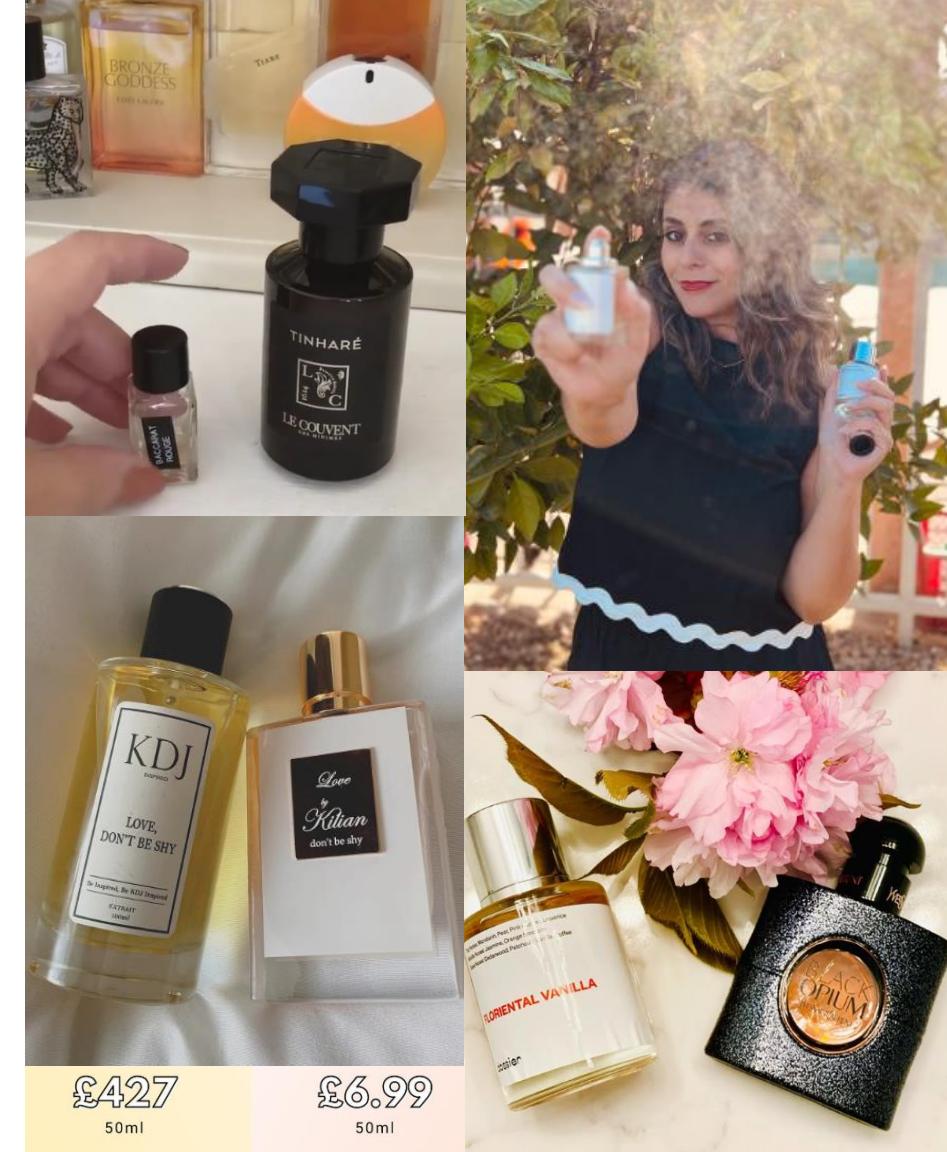
- PRODUCTS THAT OFFER EFFICIENCY ON SPECIFIC SCENTS & INGREDIENTS.
- INNOVATIVE FORMULATIONS FOR DISCOVERY.

CATEGORY AFFINITY

1. FRAGRANCE
2. (SKINCARE LOW SIGNAL)

// I finally got my hands on some @dossierperfumes in the scents ambery cherry and ambery saffron. I love notes of amber and jasmine. but oh my the saffron one is divine. If you haven't heard of them before. Dossier began its mission to make luxury fragrances accessible. Each scent is crafted of the highest quality. sourced from Grasse. France. the perfume capital of the world (which I did not know!). They pretty much recreate popular high end fragrances at an affordable price and in today's society. who's not going to love that approach?! 🌸😊 The ultimate DUPE!

C1 - Internal use



£427
50ml

£6.99
50ml



LA PRAIRIE SKIN CAVIAR LUXE CREAM



LACURA CAVIAR NIGHT CREAM

#mixandmatch
#signatureglow

#signaturescent #scentlayering
#beautymyway
#creativeroutines #perfumeplay