MASTER THESIS DEFENSE · MIM-BUSINESS MANAGEMENT

Cultural Influence and Perceived Product Quality in K-Beauty Consumption

A qualitative study of French Gen-Z consumers

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Korean beauty has gone mainstream in the one European market built on their own deeply-rooted beauty heritage

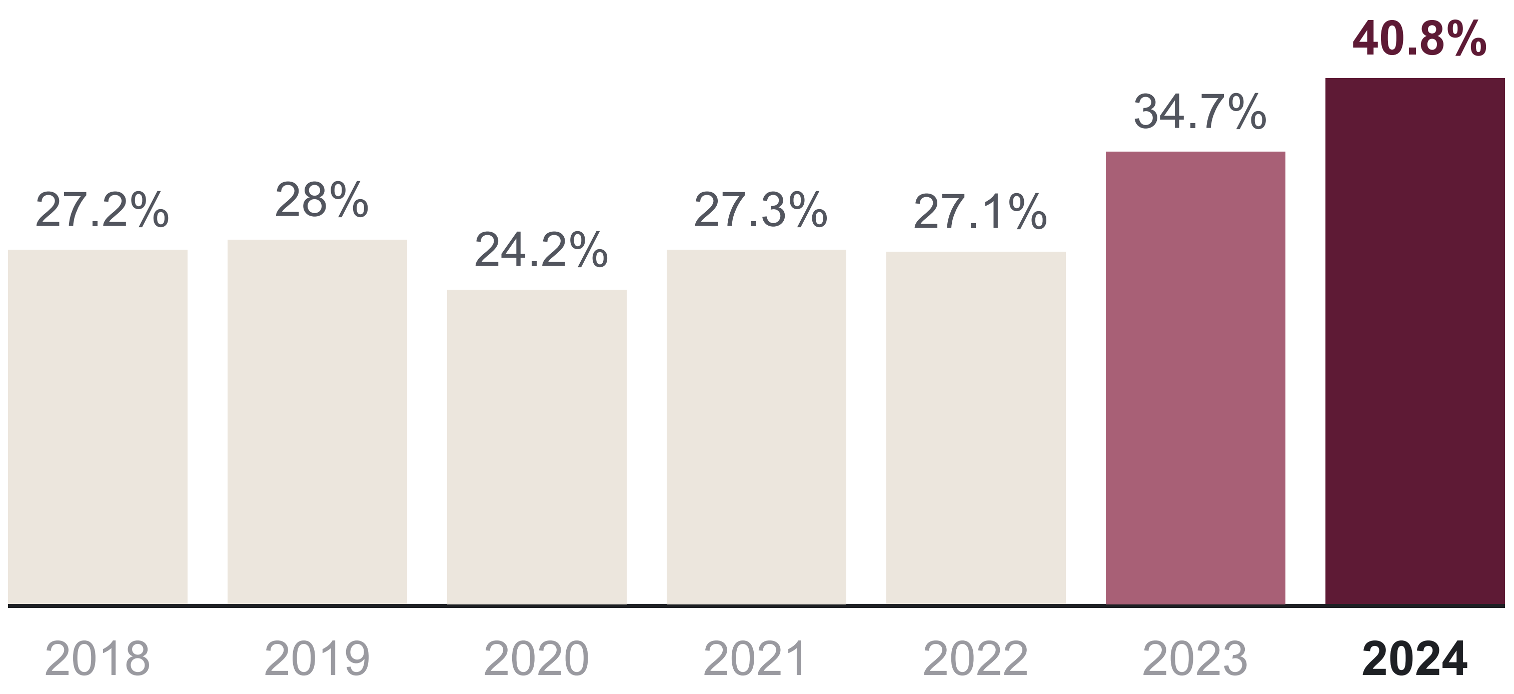
€67.5M France was the **largest European importer** of Korean cosmetics increasing by 46% in a single year.

No. 2 By H1 2025 South Korea **overtook France** as the world's second-largest beauty exporter.

2.6M **#kbeauty** posts on TikTok: the channel running ahead of retail and advertising.

K-Beauty popularity in France is climbing

Share of French consumers exposed to Korean content who find K-Beauty popular



Sources: Korean Cosmetic Agency, 2019; Tewari, 2026; Statista, 2026; TikTok figures verified during the research, Jan 2026.

01 · MARKET CONTEXT

France is the toughest test a beauty category can face
which is exactly why it matters

78.2%

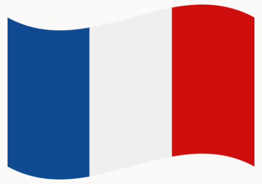
of young French consumers preferred **French-origin cosmetics** in a previous study (the most ethnocentric of eight European countries surveyed)

A culture, not just a category

French beauty institutes have paired science with skincare since **1895** . The pharmacy-led dermo-cosmetics tradition with brands like La Roche-Posay, Bioderma, Avène sets the local definition of "quality".

A label still working against the tide

Prior research finds that "Made in Korea" is no longer a negative but it has **not yet outweighed** the dominant pull of "Made in France".



VS

Sources: Bartosik-Purgat, 2018 (2015 data); Grout, 2024; Menache & Bailleux, 2021.

01 · WHY IT MATTERS

The industry is betting billions on Gen-Z and on owning Korean brands

$12T

projected Gen-Z spending power by 2030. Already **25% of the global population** — and the primary target of global beauty.

MAJORS MOVING INTO K-BEAUTY

- 2008 AmorePacific's air-cushion compact, later copied by Lancôme, Dior, YSL by 2016
- 2019 Estée Lauder acquires Dr. Jart+ which is now reportedly up for sale (2026)
- 2024 L'Oréal acquires Dr.G to capture affordable, effective K-formulations
- 2025 Printemps, Monoprix & Sephora scale K-Beauty into mainstream retail

Normal (Retail France)

Monoprix

Sephora

Sources: NielsenIQ, 2025; Lee, 2019; Garnier, 2025; WWD, 2026; Tewari, 2026.

★ THE RESEARCH QUESTION

Prior research shows the Korean Wave increases *interest* in Korean products, but how the consumers *critically evaluate* these brands and which step actually drives a purchase is much less known

SO

How do French Gen-Z consumers balance *trend-driven cultural influence* and *perceived product quality* when forming purchase intentions toward K-Beauty brands?

The three key themes identified in the literature intertwined behind the purchase decision

01

Purchase Intention & Quality

How intention forms (Theory of Planned Behaviour) and how consumers judge quality through intrinsic vs. extrinsic cues.

Ajzen, 1991 · Zeithaml, 1988 · Dodds et al., 1991

02

Trends & Cultural Influence

Social media and influencers as trend engines, and the Hallyu effect on attitudes toward Korean products.

Flecha Ortiz et al., 2023 · Cho, 2021 · Sokolova & Kefi, 2020

03

The French Market Context

Country-of-origin effects and the higher trust for "Made in France" that any new beauty company entering France must compete with.

Laroche et al., 2005 · Javalgi et al., 2005 · Rebufet et al., 2015

Why these three: the question is not "do people like K-Beauty?" but how a *behaviour*, *evaluation*, and the *French cultural context* interact to turn into a purchase.

What the literature predicted for K-Beauty in France

A With unfamiliar brands, consumers will fall back on **price as the quality signal** and consequently low prices may trigger doubt.

B **Hallyu (Korean Wave)** which includes K-pop and K-drama engagement might be a major pathway into K-Beauty interest.

C **Influencers & parasocial bonds** should be strong predictors of beauty purchase intention for Gen-Z.

D French **ethnocentrism** and **country-of-origin effect** should act as steady resistance to a foreign beauty category.

The interviews confirmed some of these and overturned others. That gap is the study's contribution.

A qualitative design was built to discover the deeper meaning behind consumer intentions and let patterns emerge from real consumer data

PHILOSOPHY

Interpretivist

Understanding how consumers personally interpret K-Beauty.

APPROACH

Inductive

Theory developed from emerging patterns in the data.

METHOD

9 interviews

Semi-structured, standardised open-ended; purposive sampling.

ANALYSIS

Thematic

Braun & Clarke's six phases; Gioia data structure.

Deliberate design choice: participants had to be French Gen-Z beauty users but *not* necessarily K-Beauty users so the sample would not be pre-loaded with favourable attitudes.

Sources: Saunders et al., 2023; Braun & Clarke, 2006; Gioia et al., 2013; Patton, 2015.

Nine French Gen-Z women who deliberately varied in their K-Beauty engagement: active users, non user and discontinued user

ID	Age	Location in France	K-Beauty experience	Korean-content consumer	Status
P1	25	Paris	Since 2020; nearly all skincare K-Beauty	Limited	Active user
P2	23	Paris	Since 2023; buys every 3 months	Former	Active user
P3	22	Paris	Since 2023; beauty consultant	None	Active · professional
P4	23	South of France	Since 2023; mixes Korean & European	Limited	Active user
P5	22	Paris	Since ~2021; discovered via BTS	Active (2020)	Active user
P6	25	South of France	Since ~2024; analyses every ingredient	Active (2017)	Active user
P7	24	South of France	Tried ~4 yrs ago; did not repurchase	None	Discontinued · professional
P8	23	North of France	Has not tried K-Beauty	Former but limited (2018)	Non-user · professional
P9	23	South of France	Since 2023; first tried abroad	None	Active · professional

7 active users · 1 discontinued (P7) · 1 non-user (P8) · 4 beauty-industry professionals

Recruited via LinkedIn; interviews in English.

The Theory of Planned Behaviour provides the analytical spine to base this study

Attitude
How favourably the consumer evaluates buying K-Beauty

Subjective norms
Perceived social pressure from important others

Perceived behavioural control
Confidence the purchase can actually be carried out

→

Purchase intention

↓

Behaviour

Why TPB: it separates wanting to buy (attitude), feeling expected to (norms), and being able to (control) which are three distinct levers that can be interrogated one by one. Ajzen, 1991; Fishbein & Ajzen, 1975.

From participants' own words to four aggregate dimensions

01 **First-order concepts** Grounded in participants' language		02 **Second-order themes** Researcher's analytical abstraction		03 **Aggregate dimensions** The four pillars of the findings
"Saw it on my For You page"	→	Algorithmic discovery	→	Discovery & influence
"I check the ingredient list"	→	Ingredient-led evaluation	→	Evaluation & quality
"I don't trust 'gifted' posts"	→	Distrust of sponsorship	→	Trust, risk & resistance
"No K-Beauty shop near me"	→	Channel-access barriers	→	Purchase & behaviour

Figure 1 · data structure adapted from Gioia et al., 2013. Representative concepts shown

Four dimensions trace the journey from user’s social media feed to purchase

1 **Discovery & influence**
How they first encounter and warm to K-Beauty

2 **Evaluation & quality**
The cues they use to judge whether it is good

3 **Trust, risk & resistance**
The scepticism and loyalties that hold them back

4 **Purchase & behaviour**
What finally converts intention into a purchase

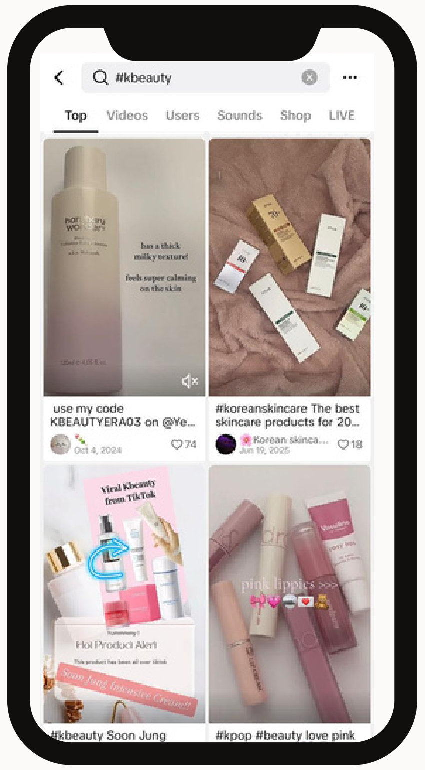
Social media is the universal gateway for K-Beauty introduction while Korean culture is a narrower path than assumed

9/9 discovered K-Beauty through TikTok, Instagram or YouTube. No one through traditional advertising or in-store browsing.

2/9 were drawn in by **Korean culture** (K-pop, K-drama). For the rest, the cultural link was absent or explicitly denied.

> *“My For You page is very made for me… I remember VT Cosmetics, the Reedle Shot. I saw it on TikTok and I directly purchased it.”*
>
> P2 · Paris, active user

Peer recommendation then acts as a **validation bridge** : social media creates awareness, a peer’s personal experience or recommendation converts it.



Consistent with Flecha Ortiz et al., 2023 (passive TikTok exposure drives engagement) and Martin, 2024.

For French consumers it’s ingredients, not price or brand name that decide perceived quality

> “When I think of Korean products, I always think of clean ingredients and results-above-marketing products.”
>
> P1 · Paris, active user

Ingredient list is the primary cue

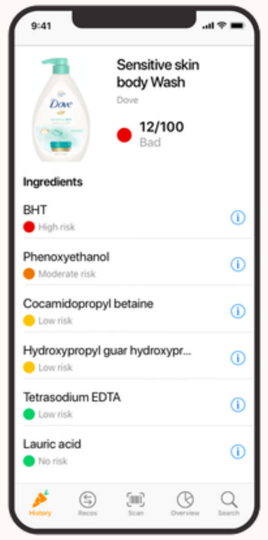
Scanning apps (INCI Beauty, Yuka) let consumers grade products directly and some even abandon brands that score poorly.

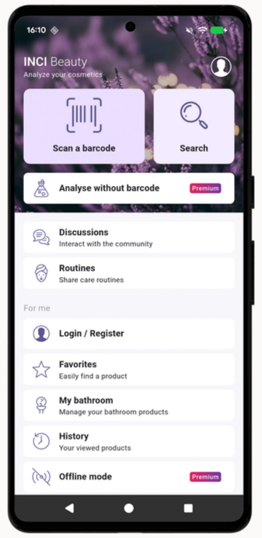
K-beauty perceived as more innovative

Formats, ingredients and routines seen as ahead of French skincare "more innovative; R&D, new complexes" (P7).

French & Korean = complementary

French for treatment & pharmaceutical authority; Korean for prevention & innovation. Mixed routines, not substitution.





Contradicts the price-as-quality heuristic (Zeithaml, 1988; Dodds et al., 1991); echoes Bensussan, 2025 on ingredient-scanning apps.

Consumers avoid trusting any content online that looks paid for

- **Distrust of sponsored content**

  A categorical rejection of "ad", "gifted", "partnership", trust is redirected to non-commercial users.

- **Hype fatigue & trend scepticism**

  Viral ingredients (PDRN, snail mucin) are researched and questioned; viral buys caused problems for some consumers.

- **Default French loyalty**

  Consumers hesitate because of the switching-cost threshold, not ethnocentrism. K-Beauty must clearly outperform the current routine to win.

> “*Whenever I see a product labelled 'ad' or 'gifted', I don't trust the results are real. But if I see regular people talking about it, that influences me.*”
>
> P1 · Paris, active user

Aligns with Wang & Lee, 2021 and Djafarova & Bowes, 2021; challenges Sokolova & Kefi, 2020 on parasocial influence.

Shelf access, not desire, is the real bottleneck to purchase

> “
> *We did not have this shop with a lot of K-Beauty in stores. It was mostly online and I didn't want to buy online. So I just stopped.*
>
> P7 · South of France, discontinued
> ”

Channel access is decisive

K-Beauty retail is concentrated in Paris; consumers in other regions faced a real access gap that shaped behaviour.

Price decoupled from quality

Whether consumers compare K-beauty to French affordable pharmacy skincare or luxury matters to form their price perception

Acquisitions ≈ neutral

Ownership by L'Oréal or Estée Lauder is irrelevant if the formula stays the same but this changes when original brand authenticity is in doubt.

Retail integration into Sephora & parapharmacies also signals implicit EU regulatory compliance.

· THE CORE FINDING

Trend and quality are not opposing forces, instead they act *in sequence*.

Cultural influence opens the door; perceived quality decides whether the consumer walks through it.

The door is awareness
Algorithmic social media exposure, Korean cultural engagement creates initial interest.

The threshold is conversion
Ingredient analysis, peer validation and shelf access determine whether interest becomes a purchase.

Re-reading TPB: the framework holds, but each lever bends in this context

ATTITUDE

Ingredient transparency shift

Attitude formed not through brand familiarity or price signals, but through ingredient transparency with apps like Yuka

SUBJECTIVE NORMS

Convergence, not pressure

Consumers rarely felt pressured to buy. Instead, low-intensity signals like a friend, a review, a feed **accumulated** into a decision. eWOM extends the norm beyond close referents.

PERCEIVED CONTROL

Promote it for new categories

For a *foreign* category entering a market, channel access may predict purchase more than attitude. A consumer can want K-Beauty and still never buy it.

BEYOND TPB

"A Korean brand but made by German people" (P2). Whether a brand is genuinely Korean is an identity question TPB and COO theory do not capture.

Argument: the price-quality heuristic broke because *ingredient-scanning technology* gave consumers a capability that did not exist when these theories were written. The model needs updating for a digitally literate consumer.

05 · IMPLICATIONS

What this means for the beauty industry (in France)

K-Beauty entrants	**Win the shelf.** Wider Physical distribution in Sephora, parapharmacies, beyond Paris is the single biggest lever, and it signals EU compliance.	**Promote UGC, don't sponsor.** Fund organic user generated content (UGC) and distinctive packaging over paid influencers; lead with ingredient transparency.
French incumbents	**The risk is redefinition** not direct complete substitution. K-Beauty is normalising new criteria: ingredient transparency and innovative formats.	**Pair heritage with transparency and innovation.** Combine pharmaceutical authority with the openness and creative innovation consumers now expect.
The market	**A parallel category.** French and Korean skincare coexist by function, expanding the routine rather than splitting a fixed pie.	**Regional demand exists.** Outside Paris, there is interest and demand for K-beauty which is not met with enough supply so it’s a clear expansion opportunity.

Contribution: industry-facing insight into how French Gen-Z actually convert K-Beauty interest into purchase.

Limitations of this study and where the research should go next

Limitations

- Small, educationally homogeneous sample (9 business/engineering students); exploratory, not representative.
- All participants women; recruited efforts for men were unsuccessful.
- Interviews in English biased the sample toward the internationally confident; nuance may be lost.
- Geographic access findings rest on uneven regional representation.

Future research

→ Study of the **complementary** French - Korean positioning at scale.

→ Consumer-side study of **ingredient-scanning apps** reshaping evaluation.

→ Larger, French-language, gender-balanced sample across regions.

→ Test whether **Hallyu-as-awareness** holds beyond this sample.

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· IN CLOSING

For French Gen-Z, K-Beauty is not a trend they fall for but it is a category they *scrutinise, then adopt on their own terms*.

Culture brings them to the door. Ingredient transparency, trusted peers, and a shelf within reach decide whether they walk through. For the industry, that reframes the contest from *"Korea vs. France"* to *"who earns the scrutinising consumer."*

Thank you.