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The Korean skincare conquest

A qualitative study about Korean skincare products' popularity in France

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This thesis is the conclusion of five years of studies. It is a milestone, representing both an end to our master and a new beginning towards professional life.

Abstract

France is an important actor in the cosmetic industry with famous brands like Dior, L'Oreal, or Yves Rocher. Hence, the French cosmetic industry attracts consumers thanks to its historical experience, the acknowledged quality of its products, or the luxury image these brands suggest. Other countries also have a leadership position in this industry through their brands. Recently, brands from South Korea appeared in the French market, especially with skincare products. Nowadays, South Korean skincare products are sold in French stores and are becoming popular among French consumers.

This study is focusing on the development of South Korean skincare products and their recent arrival. Through the past years, those products became popular, even if they were in direct competition with historically French competitive brands. We will explain and develop this phenomenon through our research. We will focus on skincare products, that are a cosmetics subcategory that concentrates on the protection and health of consumer skin. Therefore, this study investigates the explanations of this growing popularity in France with the following research question:

Why are Korean skincare products becoming more popular among French Consumers?

During our literature review, we first learned about the global innovation strength of South Korea, including in the cosmetic industry. Also, we discovered the importance of beauty in South Korea, which is part of their culture. One can notice that by analyzing the cosmetic and beauty surgery industry. Finally, previous studies also discussed the consumer side, especially their loyalty to specific brands, resulting in a strong entry barrier.

Our qualitative research aims to fill gaps in the literature review and shed light on the Korean brand's success factors in the French market through a qualitative study. Thanks to the interviews of six professionals and seven consumers, we discovered and analyzed consumer behavior, skincare product perceptions, and Korean brand strategies.

Thanks to both primary and secondary data, we succeeded in bringing together diverse visions and creating a framework to answer our research question.

Findings indicate three positive factors explaining the actual growing popularity. The first factor is related to the Korean beauty culture and the innovation ability of Korean brands, inspiring French brands and indirectly educating consumers. The second factor is related to Korean brand image and distributor strategies. Finally, the profile and expectations of the consumers also played a positive role.

Keywords: French market, Korean brands strategies, skincare, French consumers profile, consumer behavior, skincare product perceptions,

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1.0 Introductory Chapter

The purpose of this chapter is to introduce the reader to our subject choice. We will provide some background to understand the issue tackled better. We support those parts with a lot of data to help the reader better understand the cosmetic and skincare industry. Finally, we will present our research question and explain what the aim of our study is.
What about the eastern vision of French cosmetic brands?

1.1 Subject choice

France is a strong leader in several industries; aeronautics is the first industry leader in France, followed by cosmetics. The cosmetic industry keeps growing, and the analysis firm Zion Market Research stated that by 2024, the worldwide cosmetics market would be 863 billion dollars (Laurent, 2020). France is the first exporter of this industry, with total revenue of 15 billion euros (Laurent, 2020). French cosmetics sales are getting significantly more robust in the Asian market (Laurent, 2020). We created Figure 1. to help visualize the French leaders in cosmetics in 2019. L'Oreal is a worldwide famous cosmetics company that made it in the CAC 40. They had total revenue of 31,8 billion dollars in 2019 (Laurent, 2020). Unilever and Estée Lauder are respectively in second and third position, with total revenue of 22,4 and 13,2 billion dollars in 2019 (Laurent, 2020).

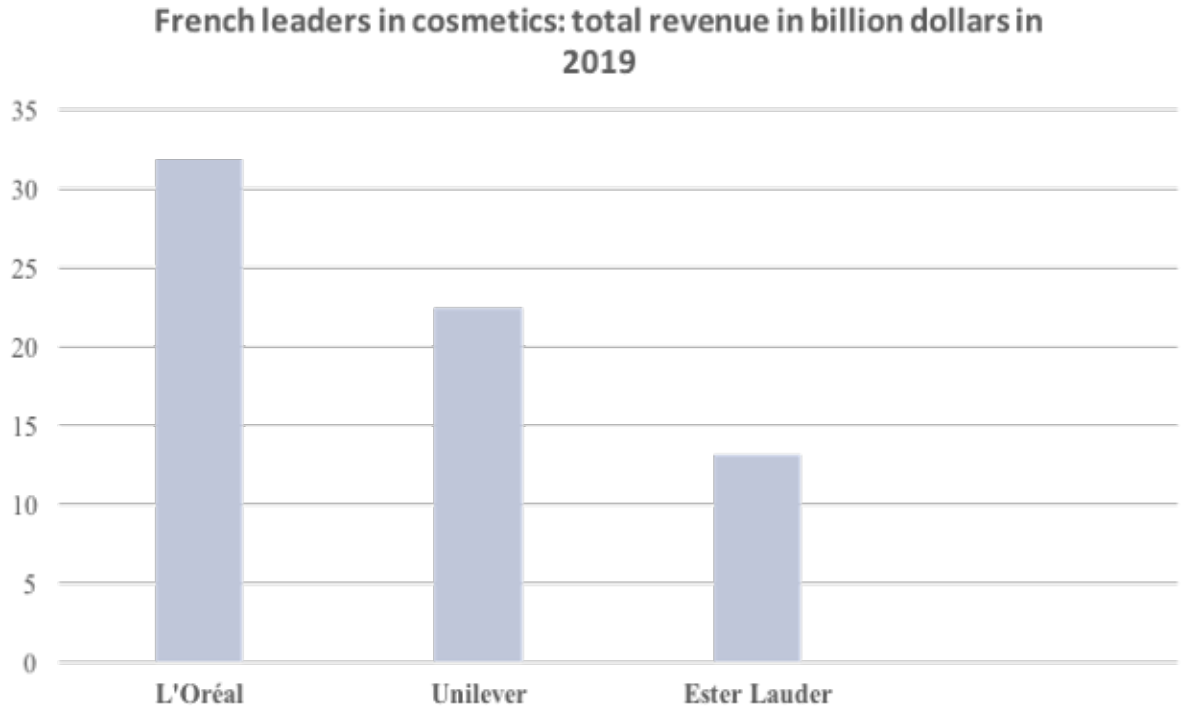

Figure 1. French leaders in cosmetics in 2019 (adapted figure). Source: Laurent (2020)

Through our personal experience and readings, we noticed the emergence of South Korean products in France (we will now refer to South Korea as Korea in the development of our thesis for easier reading). In Europe and also in France, studies highlighted a growing market share of Korean products. In 2018, France was the most significant importer from Korea in Europe (Korean Cosmetic Agency, 2019, p. 59). In 2018, France

imported 67.5 million euros with an increase of 46% from 2017 from Korea (Korean Cosmetic Agency, 2019, p. 59). French Market is the 11th market of Korean cosmetics exports in 2018.

One of their driving and star products is the Blemish Balm cream, usually known as the BB cream. This product provides a skincare lotion and a Sun Protection Factor (called SPF). This product, driven by increasing Koreamania in Eastern countries, caused the positive results of Korean cosmetic companies' implementation. According to the Korean Herald, in 2017, exports of Korean products to Europe represent 92.7 million euros in front of the 9.2 million euros exports in 2009 (The Korean Herald, 2017).

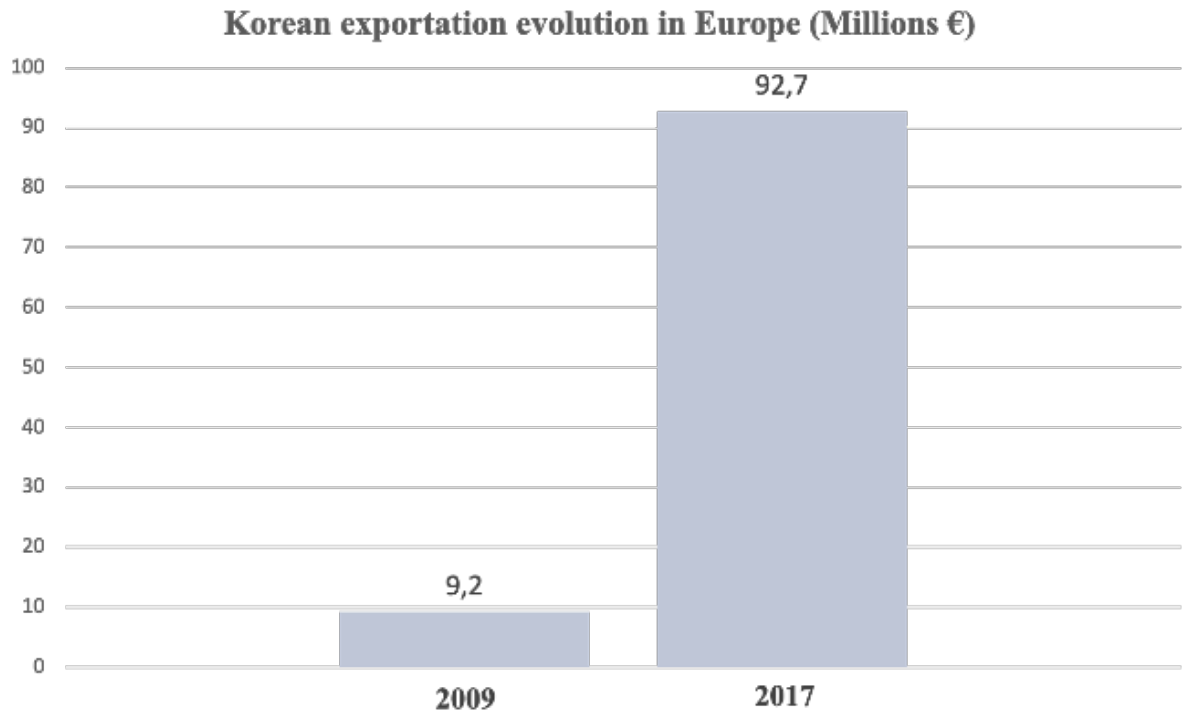

Figure 2. Comparison of Korean product exportation to Europe between 2009 and 2017 (adapted figure). Source: The Korean Herald (2017)

This growing importance is interesting to study on a marketing and consumer behavior scale by the arrival of young companies in a saturated cosmetic market as the French one.

1.2 Problem Background

1.2.1 The cosmetic industry in France and Korea

French cosmetics are a massive success as underlined by the numbers and statistics mentioned before. "Made in France" is a success in the cosmetic industry, be it in beauty shops and pharmacies, both from a famous brand or a small French company. Patrick O'Quin, the president of FEBEA (Fédération des Entreprises de la beauté), which is the French Federation for Beauty Companies, stated that the indicator "Made in France" contributes to raising the price by 30% (Bry, 2020, p. 38). Bry explains in her article that

France can have a competitive advantage thanks to its know-how of the industry and its innovation ability (2020, p. 38). For instance, the concept of dermo-cosmetic, that is, care with some cosmetic action and dermatology, was invented by people like Pierre Fabre. He was a French pharmacist and a cosmetics executive (Bry, 2020, p. 38). He founded Laboratoires Pierre Fabre. Thanks to French expertise and knowledge, formulators can take inspiration from other innovative products, like the famous BB cream mentioned earlier and some Asian beauty rituals (Bry, 2020, p. 38). There is also the aspect of security that needs to be mentioned as regulations are stringent. Therefore, brands would be easily trusted and seriously considered. It is interesting to notice that the most successful products to exportation in cosmetic are skincare products, perfumes, and lipsticks (Le Theuf, 2020)

Korea's economic evolution is a success. They succeeded in a few decades to transform from a low income to a high-income economy. As a result, their Gross Domestic Product (GDP) growth is on average 7.3% annually from 1960 to 2019 (The World Bank, 2021). On top of this, they succeeded in becoming leaders in innovation and technology. Their cosmetic industry also became highly successful as they are the 9th biggest cosmetic market (Korean Cosmetic Agency, 2019, p. 27) for a country of 51.71 million habitants (CIA, 2021). The Korean cosmetics market size in 2017 reached 11.6 million dollars (Korean Cosmetic Agency, 2019, p. 27). It is a market dominated by two major companies with more than 60% of the market in 2013, which are AmorePacific and LG Household & Healthcare (Korean Cosmetic Agency, 2019).

Korea is famous for its skincare products. In 2018, AmorePacific and LG Household & Healthcare were respectively ranked 12th and 15th in the world ranking cosmetic companies by sales with a progression of 0.4% and 16.5% since 2017 (Korean Cosmetic Agency, 2019, p. 39). This is an essential part of Korean beauty. It is linked with the point that Koreans usually have important cosmetic habits, such as the **10-step skincare routine** (Hautala, 2020, p. 5). This consists of applying ten products in ten steps: oil cleanser, foam cleanser, toner, essence, emulsion, serum, sheet mask, eye cream, moisturizer, and sunscreen (Hautala, 2020, p. 5). This daily **routine** is really specific and far more developed than in France. To meet the criteria of beauty, one should aim for fresh and glassy skin. We will often refer to these daily ten steps ritual as a routine in our thesis.

1.2.2 Korean culture and the place of beauty

As part of their economic development, the Korean Wave, also called the ***Hallyu***, clearly participated in popularizing the culture of Korea by exporting their beauty standards (Trofimova, 2020, p. 1). It includes music, TV, dramas, movies, and fashion (Trofimova, 2020, p. 1). This Koreamania started from the beginning of the 2000s and is still increasing (Gélézeau, 2015, p. 5). Therefore, in this thesis, we will often use the term Hallyu when we mention the rising popularity of Korean culture.

According to Kang (2020, p. 24), in 2013, K-pop's economic value was estimated at 5 billion dollars. Consequently, one could also notice an increase in the tourism industry. Later on, the famous music band BTS succeeded in making it at the international level and to be a reference in the Western pop industry. In 2018, BTS produced around $5 billion annually, and $3,5 billion comes from foreign tourists (Kofice, 2018, cited in Kang, 2020, p. 24). Recently, the Korean movie "Parasite" won the Oscars and top prizes

in 2020 (Kang, 2020, p. 25). This last event is another sign of the increasing popularity of Korean culture.

An element to notice through the exportation of the culture is the exportation of Korean beauty. In Korea, physical appearance is essential, especially for the skin aspect. One can argue that their beauty standards come from the westernization of their society. Throughout the popular phenomenon of aesthetic surgery in South Korea, one can notice this importance of physical appearance and the western characteristics of beauty research. Indeed, South Korea is acknowledged as one of the world capitals for aesthetic surgery. South Korea is the 5th country in plastic surgeons regarding the number of interventions. It represents 5.1% of worldwide plastic surgeons - behind more prominent countries such as the USA, Brazil, China, and Japan (International Society of Aesthetic Plastic Surgery, 2019). Those operations are famous for both foreigners and locals. Plastic surgeries are common in Korean culture: in 2008, a survey evaluated that 20% of women and 15% of men already had plastic surgery (Holiday & Elfving-Hwang, 2012, cited in Gelézau, 2015). The most popular plastic surgeries in Korea follow the "Western" idea of beauty as the blepharoplasty or double eyelid operation (Edmonds & Leem, 2020; Gelézeau, 2015). These needs qualifying; it is a matter that is argued by different authors, like Holliday and Elfving-Hwang, that Korean beauty is the construction between the globalized and Korean standards of beauty (Holliday & Elfving-Hwang, 2012, p. 76).

K-beauty has reached the US and the European market. Nowadays, many brands are sold in retail shops. It is the case on Sephora's website where a specific section for Korean care products exists (Sephora, 2021). Sephora is a French multinational retailer of personal care and beauty products. The LVMH firm Sephora also sells many Korean products such as Laneige, or Tony Moly, which show that French companies have an interest in providing these products in the French market. They also succeeded in gaining interest from the rest of the world through the Hallyu, as the rising popularity of Korean culture increasingly had an impact on the beauty market (Trofimova, 2020, p. 1)

1.2.3 Research question

Everything introduced above led us to focus on the effect of Korean skincare products in the French market as our **research topic**. Indeed, our study aims to understand how Korean cosmetics companies reached a French market that is already highly competitive with many companies in this industry. Furthermore, we will evaluate why consumers positively received and purchased these new brands from the French consumer and professional perspective thanks to primary and secondary data. Thus, by studying this research topic, the goal is to have insights from both sides of this thriving new arrival and settlement on the French market. Also, we want to know about the role of the strategy developed by Korean cosmetic companies according to French companies and consumers in this success.

Therefore, we came up with the following **research question**:

Why are Korean skincare products becoming more popular among French Consumers?

1.3 Purpose

The thesis aims to discover how Korean skincare products made it into the French market.

We want to study the different factors that could influence the French market and the consumer's purchasing intention. We will attempt to determine the influence of the Korean Wave in this purchasing decision. Also, we want to determine how "Made in Korea" is perceived in France. For instance, why a Korean skincare product would be perceived a certain way by a consumer. Numerous scientific literatures previously studied the brand power linked to the Country-of-Origin (COO). The nation's branding also had a consistent evolution thanks to the popularity of the Korean culture, thanks to Korean-pop music (K-pop). It participated in giving a positive image to the country, and this had a direct positive impact on the economy of the country. We want to go deeper into the French consumer's perception of the arrival of new companies and products, the way consumer ethnocentrism will affect their behavior. This study area will bring more data on the innovation perception, acceptance, and consumer behavior of Korean products.

Furthermore, we aim to integrate a **professional perspective** on the consumers in our analysis. Through primary and secondary data, we seek to explore the strategy applied by Korean companies to incorporate a market already saturated by leaders of the industry. We believe that this part will bring strategic insights for cosmetic companies and other industries. Typically, we investigate why Korean cosmetics convince French companies to sell them or to imitate their products, like the BB cream.

Finally, we will seek to elaborate a framework regarding critical aspects that lead Korean companies to reach this market. The companies' choice and the consumer perception to give a global insight on this market penetration will be the base of this framework.

Developing this particular framework leads us to build our thesis through a qualitative study with several interviewees. As presented in Chapter 3, we believe that this choice of research in front of a quantitative one will allow us to collect more diverse answers that rely on consumer perception. Even if we know and assume that we will collect fewer consumer insights, we believe that the qualitative study will bring us more specific clues to help us elaborate our framework.

2.0 Literature

In this chapter, we are going to study previous literature on the following topics: the Korean's culture of beauty (2.1), the general globalization of Korea's culture and the French market organization (2.2), brand strategies and their impacts on critical aspects of customer's perception (2.3) and the role the country of origin can have on purchasing intention (2.4). Finally, we will compare the French and Korean expectations related to a product and explain what the consequences are on the overall product acceptance (2.5) This should help us identify essential findings to start building a framework (2.6) that will be analyzed and structured better thanks to our primary data collection: the interviews.

2.1 Culture of beauty

Through our research, we discovered beauty has particular importance in Korean society, essential to mention. Beauty has a central place that directly impacts the everyday life of Korean women in their act of consumption, their daily routine, and their place in society. Based on the previous literature review, we will first present the beauty criteria and habits in Korea and compare them to French ones. Second, we will explain how beauty expectations can lead to social pressure for Korean women. Third, we will introduce some worldwide popular Korean beauty products that changed the cosmetic industry.

2.1.1 Beauty criteria, habits

In Korea, Korean beauty evolved over time: around 2005, Korea would try to imitate Western beauty when now they have their own identity (Yun cited in Estrade, 2015, p. 38). We will later discuss a notion of a hybrid beauty that appears regularly when studying Korean beauty. Regarding Korean beauty criteria, the face needs to be symmetrical, narrowed lower face with an oval jawline, large eyes, and small mouth (Gélézeau, 2015, p. 9). That is why blepharoplasty or the double eyelid operation is so popular (Estrade, 2015, p. 21)

Korean women apply more than five beauty products on their skin (Gélézeau, 2015, p. 4).
A study conducted by Kantar Worldpanel in 2009 underlined that Korean women use on average five products for their skin in the morning and five others for the make-up (Barbery-Coulon, 2013). As underlined in an article of Forbes, Korean beauty care is about meticulous steps that include double cleansing, toning and exfoliating then facial sheet mask (Chung, 2019). Our study will often refer to these Korean beauty rituals by the words "**routine**" or "Korean routine."

In France, cosmetics also have an essential role but in a different way. French cosmetic companies rely on a "French lifestyle", mixing prestige, chic and elegance. (Laurent, 2020). This is also supported by a strong economy of cosmetics with major brands such as L'Oreal with a 31,8$ billion of turnover in 2019 (Laurent, 2020). That affirmation matches the saying of Sarah Laurent (2020) that underlines that mascara and skincare products are the most popular in the daily use of French consumers. It is not about pursuing one beauty type but stressing forward the beauty of one individual.

2.1.2 Social pressure of beauty

In Korea, there is a culture about physical appearance that is excessive through a deep passion for aesthetics with the will to conform to society (Gélézeau, 2015, p. 4). According to Leem Seo Yeon's research (2014, cited in Gélézeau, 2015, p. 9), a solid **social belief** that beauty and **success** are linked exists. It seems to be a decisive factor as much as the economic factor. Therefore, in Korea, one judges' appearance all the time. Thanks to Korean history, one can explain this social belief by the popularity of divination and interpreting physiognomy that used to be common practice (Gélézeau, 2015, p. 9). When you change your appearance, you can alter your destiny (Gélézeau, 2015, p. 9). The last idea is that beauty is perceived as a social ladder; it is also considered a **moral obligation** within the society that shows your respect for others and your status and moral values (Gélézeau, 2015 p. 10).

The importance of appearance can be found and confirmed in **consumption behavior**, with Korea being the third biggest market for luxury goods in Asia in 2011 (Gélézeau, 2015, p. 4). This passion is not only related to goods but also the body and face. South Korean women are the largest consumer group of cosmetics worldwide. Also, as mentioned, beauty rituals take six times longer than French women: when Korean women apply five to nine beauty products on their skin, French women apply only one to three products (Gélézeau, 2015, p. 4).

Beauty expectations go beyond cosmetics as it also involves procedures **such as plastic surgery** (Gélézeau, 2015, p. 4). Advertisements for procedures are easily found in all large Korean cities. In 2014, the ranking published by the International Society of Aesthetic Plastic Surgery revealed that Korea had the 4th most surgical procedures. Even more interesting is that Korea has the highest number of procedures per person (Gélézeau, 2015, p. 4). Among popular procedures, one can find that blepharoplasty, eyelid surgery, and skin lightening are very popular; they are often performed in any beauty salon (Gélézeau, 2015, pp. 4-5). The procedures are also commonly given by parents to celebrate entrance to the university (Gélézeau, 2015, p. 5).

This social pressure of beauty can be analyzed and also **perceived through relationships.** Pointing out if someone looks bad or gaining weight is standard practice and shows that you care for others to improve their physical appearance (Gélézeau, 2015, p. 5). Therefore, the social pressure to conform to society paired with a passion for beauty gives. As a result, a Korean culture is highly consuming cosmetics, and surgery. Yoon and Kim's (2019, p. 233) quantitative study proves that surgery helps increase self-esteem. They explain surgery is not linked to the individual taste but to social-cultural attitude: "'appearance management intention," in which the socio-cultural attitude subscales reflecting individual tastes had little relevance to "self-esteem" (Yoon & Kim, 2019, p. 233).

Finally, a last vital element to consider is that Korea has a **Confucianism** heritage (Gélézeau, 2015, p. 6). Therefore, the position of the wife should be in the house. Even if Korea progressed significantly throughout the year, there is still a solid traditional belief (Gélézeau, 2015, p. 6). Korean women are also looking for empowerment when looking for more outstanding beauty (Gélézeau, 2015, p. 6).

2.1.3 Popular beauty product

As explained previously, beauty is essential in Korea, so crucial that there is a particular worldwide famous Korean beauty skincare routine and a social pressure linked to beauty in Korea. However, one can notice this importance of beauty reflected in the Korean cosmetics industry, where they have trendy products and brands that made it on the international stage.

Hera, a premium brand of AmorePacific, has 50% of its sales in make-up and the other half in skincare (Estrade, 2015, p. 39). This gives a first impression of how popular skincare is in Korea. Korean beauty has expertise on skin as according to a survey by Statista (2021b) *"on the global popularity of South Korean beauty products in 2020, around 43.1 percent of respondents stated that Korean beauty products were very popular in their country"*. This trust of expertise is about skincare, but for make-up, Korean women would prefer other brands, like the French one: Lancome (Lizzie, 2013).

A famous worldwide product is the **BB creams**, including moisturizers, tint, and sunblock (Misery, 2013, p. 74). In 2008, another renowned product came: the **cushion cream** that also became famous worldwide. It is described as *"a liquid foundation soaked in a sponge featuring a makeup base, sun protection, and skin moisturizer all in one product"* (Spillman, 2015, cited in Cosgrove, 2015). One can notice it arrived later in France with some leading brands like Lancôme with the Miracle Cushion Cream in 2015 (Vivat, 2015).

2.2 Globalization and Culture

Korea was not among the first industrialized countries, but it had an awe-inspiring development. It is essential to understand their recent history to understand its impact on their culture and their relationship with other countries. First, we will explain recent Korean history and how it gave birth to a Korean hybrid culture. This history had a direct impact on their rising worldwide popularity and their cosmetic industry. Second, we will discuss the Korean Wave called Hallyu more thoroughly. Finally, as our thesis is focused on the French market, it is essential to provide more details on some aspects of the French market organization.

2.2.1 Korea history and cultural hybridization

The Korean Wave is a global and local phenomenon showing the transformation of culture and the economy (Ryoo, 2009, p. 137). According to Homi Bhabha (1994 cited in Ryoo, 2009, p. 143), the term hybridization locates the margin where cultural differences come into contact and conflict. It is a mix of identity, the adaptation of global to local. This means hybridity is not only a blending but a creation. Hybridization was meant to happen for contemporary and postcolonial cultures like Korea (RyooF, 2009, p. 143). It includes social, political, economic, and cultural elements. This concept is a framework that helps understand better why there is an increase in global cultures (Ryoo, 2009, p. 143). This means hybridization is a form that can take globalization. Therefore, the Korean Wave is a fascinating phenomenon due to different cultural intersections giving birth to its own modern economy and culture. Before the Korean Wave, even the

Korean neighbors did not know more than stereotypes about them. Hallyu succeeded in adapting the Western and Asian culture and got acknowledged (Ryoo, 2009, p. 145).

In terms of economy, Korea faced remarkable growth through the years. There are different methods to measure economic growth: the growth rate and gross domestic product (GDP) (Papava, 2014, p. 3). Some countries may have higher growth rates than some developed countries because they are "catching up." This was the case of Korea that faced a notable change through the years and became a strong country; that is why we can call this quick rise of Korea "the catch-up effect." One can define the catch-up effect as: "due to diminishing capital returns, countries with relatively low levels of economic development find it easier to achieve higher growth rates than countries with more advanced economies" (Papava, 2014, p. 4).

In terms of culture, one could legitimately think of Japan as popular Asian culture. This is because Japan started to export its culture in the 80s; however, the difference comes from the colonial past and life country philosophy (Estrade, 2015, p. 54). Also, Korea was not an important colonizer, so there is no particular reluctance to embrace their culture of other Asian countries. Also, Japan's culture is very individualistic for Western countries. This gives the spot to Korea to be perceived as a mediator between Asian and Western countries (Estrade, 2015, p. 54).

In its recent history, Korea faced important events: Japanese colonization and the division of the country following the Korean war (Gélézeau, 2015, p. 8). With the Japanese colonization, the government started opening up to modernization (Gélézeau, 2015, p. 8). Later on, Korea began its transition from an emerging country to a developed one. In this process, different social classes started to emerge (Gélézeau, 2015, p. 8). One can notice Western influence throughout the importance of education as a sign of wealth (Gélézeau, 2015, p. 8). A way to increase or maintain social distinction would be through appearance, like purchasing luxury goods or work on your physical appearance (Gélézeau, 2015, p. 9). Regarding this physical appearance, one can wonder how hybrid it is, as it seems it embraces Korean and Western beauty codes (Gélézeau, 2015, p. 9).

2.2.2 Hallyu and Koreamania: Korean soft power

South Korea’s culture became a wave: the Korean Wave, called Hallyu in South Korea (Tjoe & Kim, 2016, p. 65). This wave is taking into account several industries such as the movie- and music industry. South Korea is the tenth-largest economy globally (Lambert, 2021) and has enormous entertainment industries with investment capabilities higher than in the rest of Asia (Ryoo, 2009, p. 139).

According to Ryoo (2009, p. 139), it all started with the exportation of South Korean TV dramas equivalent to Western series. Winter Sonata became a massive success in Japan, Taiwan, Vietnam, and Uzbekistan (Ryoo, 2009, p. 139). Other Korean dramas had similar success in all of Asia. It is interesting to notice that Korea influencing other countries is relatively new, as historically, they had to submit to the domination of China and Japan. This success of the dramas can be explained by the fact Asian audiences feel culturally closer to those Korean dramas than some Western productions. Dramas typically focus on family issues, love stories, and filial transformation (Ryoo, 2009, p. 139). As the Korean drama industry is also involved in the music industry, Korean-pop (K-pop) helps attract even more audiences, and K-pop singers are most often working on the

soundtracks of the dramas (Ryoo, 2009, p. 140). One can mention BoA, who became a successful cross-cultural artist. She received the award 'Most Influential Asian Artist' and 'Favorite Artist' prizes at the MTV Asia Awards in 2004 (Ryoo, 2009, p. 140). More recently, BTS succeeded in making it at the international level and to be a reference in the Western pop industry as it was underlined in the New York Times. (Caramanica, 2020).

The movie industry is not only successful in their dramas but also their films. On the Korean domestic market, Hollywood productions do not have a dominant share (Ryoo, 2009, p. 141). For instance, when the Titanic movie had 4.7 million local viewers in 1999, Shiri attracted 5.78 million viewers (Ryoo, 2009, p. 141). The film industry is not only robust at a domestic level, but it is acknowledged on a worldwide level. In 2004, the Old Boy movie won at the Cannes Festival (Ryoo, 2009, p. 141). More recently, there is a Korean movie, "Parasite," which won Oscars and other top prizes in 2020, as underlined by Sotinel in a famous French newspaper (Sotinel, 2020).

One might better understand how the Hallyu grew stronger and how much Korean culture is famous, not only in Asia but also in the rest of the world. To acknowledge the Hallyu phenomenon is essential as it had a direct impact on Korean cosmetics sales. Thanks to it, the rest of the world became more familiar with Korean Products (Tjoe & Kim, 2016, p. 66). This knowledge is extended not only about music but also about fashion and food (Tjoe & Kim, 2016, p. 66).

2.2.3 The French market organization

9th worldwide in revenue, the French Beauty and Personal Care market is substantial with 14 502 million $ in 2020 (Statista, 2021a). Even if the market looks saturated, it is continuously growing each year with an average of +1.1% between 2012 and 2019 (*Appendix 1*). Although a decrease in 2020 mainly because of the Covid pandemic, a rebound is expected for 2021 with a +3.41% growth since 2020 (*Appendix 1*). It is also interesting to analyze that sellings in this market are still mainly offline in France, with a ratio of 77% offline for 23% online in 2020 (*Appendix 2*, Statista, 2021a). On this market, the skincare market represents 28% of the Beauty & Personal Care market. It has a similar growth as the global one with more than +1% of annual growth between 2012 and 2019 (Statista, 2021a).

One specificity of the cosmetic industry in France is the creation of the Cosmetic Valley in 1994 (Cosmetic Valley, 2021). This Cosmetic Valley gathers companies from the cosmetic production chain to improve synergies within the supply chain. This project, of putting together stakeholders, has been a success with the implantation of famous brands such as Dior or Yves Rocher (Cosmetic Valley, 2021). Therefore, this Cosmetic Valley seems to be an attractive spot for cosmetic companies. This is relevant for our thesis to highlight the settlement of the Korean group AmorePacific in this region in 1990. They possess an industry in this area linked to the perfume conception.

2.3 Brands and consumer's perception

So far, we have shed some light on the Korean culture of beauty, their cosmetic industry, and the rising popularity of their overall culture through the Hallyu. In this part, we want

to focus on how the Korean industry capitalized on its culture to build up some robust marketing strategies. Then, we will develop the concept of Customer-Based-Brand-Equity, a fundamental framework for analyzing a brand and the consumer's perception. Finally, we want to discuss the Korean case of AmorePacific. This is a dominant brand in Korea and one of the prominent companies trying to penetrate the French market. They previously tried to penetrate the French market and learning more about that experience should offer us a better understanding of the barriers to face when entering the French market.

2.3.1 Companies' marketing strategy

The market orientation of the companies is also a relevant part to highlight on our thesis. Narver and Slater (1990, pp. 21-22) develop its components: customer orientation, competitor orientation, and interfunctional coordination. Customer orientation is related to the understanding of the company of the buyer. Competitors orientation means the *"seller understands the short-term strengths and weaknesses and long-term capabilities and strategies of both the key current and the key potential competitors"* (Aaker, 1988, cited in Narver and Slater, 1990, pp. 21-22). Interfunctional coordination is about the way the company resources are used to create value for the targeted customer. Another market orientation is underlined by Noble et. al (2002, p. 26), focusing on more promotional considerations and sales. Thanks to this advertising and selling strategy, the customer loyalty would not be very strong but one would expect short-term sales (Noble et al., 2002, p. 26).

Simply put, we will seek to analyze Korean skincare companies' strategy with those elements in mind. When doing so, it is interesting to notice some elements about Korea.The success of Korean dramas, movies, and music, helped Korean brands increase their market share not only in China but also in Western Europe and also in the United States (Lie, 2015, p. 127). A vector that helped the expansion of market share was the use of K-Pop figures for renowned brands. For instance, the main actress of My Love from the Stars wore a Yves Saint Laurent lipstick that made the sale skyrocket. Being a K-pop star is usually not the one role one has. As in Korea, the advertising industry is really developed, K-pop stars can often be a model for advertising in the cosmetic or fashion sectors. This helps the brands gain a more substantial online presence thanks to the fan base.

One cannot deny that the new Korean identity has Western influences, but they also rely on their heritage. According to an interview with Paul Kang, who was the senior vice president of AmorePacific R&D unit (Cosmetics & Toiletries, 2015), they chose typical elements from Korean habits for the development of their products such as. As far as Paul Kang develop his strategy, the goal in 2015 already was to extend the group worldwide with this notion of becoming a "Great Global Brand Company" (Cosmetics & Toiletries, 2015)

This example of the largest group of Korean skincare companies is relevant to highlight expectations and opportunities from them. There is through his testimony a will of spreading a Korean or Asian way of consuming skincares. The goal of Amore Pacific was and still is to grow internationally also thanks to a clear differentiation thanks to their typical ingredients.

2.3.2 Customer-based Brand Equity (CBBE) theory

Keller offered a great definition to CBBE (1993, p. 1) CBBE is *"the differential effect that consumer knowledge about a brand has on the customer's response to marketing activity"*. The CBBE theory will help us analyze our thesis. To understand it better we need to study first some key terms appearing in Keller's definition: differential effect, brand knowledge and consumer response. First, the differential effect is related to the difference of the consumer's response for the very same service, between the marketing of company A which has a famous brand and the marketing of company's B unbranded. Second, brand knowledge is related to brand awareness, mentioned above, and image. Third, the consumer response is the preferences, perceptions and behavior, originating from activities in the organizations marketing mix. (Keller, 1993, p. 8). To explain the CBBE definition in simple terms, this means that the consumer's knowledge is key because it will be a bias influencing his response to marketing for the same product or service.

The CBBE theory has the following implications: to have a knowledgeable brand shall impact consumers and provide the firm a competitive advantage, convincing the consumers to buy in this firm the product needed and not another one. (Keller, 1993, p. 6). Uniqueness is profitable.

Keller (1993, p. 2) uses the associative network memory model to clarify brand knowledge. In this model, *"Here, the knowledge is structured by information storing nodes which are connected by links."* That is to link with content Aaker also developed in his whole book. First, **brand awareness** is about the buyer's ability to recognize a brand (Aaker, 1991), is to link with the strength of the customer to retrieve information from the memory. Second, **brand image which is to link with associations:** the other ideas coming to mind that are automatically made when thinking of a brand (Aaker, 1991).

Thanks to Aaker, we can also add to CBBE theory other important features. The third one would be, the **perceived quality i**s about the perception of the quality of service or product (Aaker, 1991). Finally, the fourth one would be brand loyalty is about the intention and action of a consumer to buy a brand and keep buying from the same brand (Aaker, 1991).

Those are all essential notions when analyzing the French consumers and their relationship to some Korean products. One can wonder about how French consumers will perceive Korean brands and how they influenced their choices. It is an element we will seek to discover during the interviews. We will also seek to know how the brand associations consumers make can change their choices. We wish to understand better the French consumer visions of quality. For instance, we wonder if French consumers will test their perceived quality with some analytical data. Lastly, it is crucial to understand if loyalty was a lever to the Korean skincare success in France. Overall, the CBBE notion and its concept will be a great tool to design questions for the consumers and analyze their answers.

2.3.3 CBBE model pyramid & Specific Case: AmorePacific French Venture

The CBBE model pyramid should help us later in the analysis to understand the loyalty, awareness, and association of the consumers (Keller, 2009, p. 144). This model is the development of thought and link of a potential consumer in front of a company. Split in four different stages, the CBBE model pyramid is developed by 1) the identification of the company by the consumer 2) the identification of the proposition of the company and how products respond to the consumer needs 3) the feeling or answer of the consumer in front of the product or the brand 4) the relationship between the brand or the product with the consumer.
Level one has already been introduced: it is **brand awareness**. Level two is about **performance**: the functional need like the price of the skincare, and **imagery** which is about social need: like the desire to look young as long as possible. Level 3 is about **judgment** and **feeling**. Judgments are about the opinion created based on level 2. The feeling is more about the emotion the brand can transmit to the consumer. In our thesis, it will be interesting to understand what types of judgment and feeling French consumers had about Korean products. Level 4 is regarding the brand resonance, based on Level 3 and 2 (Keller, 2009, p. 145). It is about how much fit and feel there is between the customer and brand (Keller, 2009, p. 144). The four features are behavior, loyalty, attitudinal attachment, sense of community, and active engagement. It will be interesting to analyze Korean skincare success from the consumer's perspective.

As AmorePacific is the most prominent Korean cosmetic company, it is interesting to also focus on the French market's market penetration. This AmorePacific venture is interesting for our thesis as it reveals some barriers the Korean group encountered in the French market. Some of them can be summarized by the consumer loyalty of skincare products and the consumer recognition of the brand and Korea globally as a cosmetic producer. Therefore, we will lean on this case to evaluate the consumer perception today of Korea and skincare Korean products for this perspective. Also, it will be interesting to assess the importance nowadays of the consumers' loyalty for skincare products.

They decided to enter the French market with their "Soon" skincare products, but it was a failure. French consumers were not attracted by this brand, mainly because of the country origin product (Min & Kim Jung, 2004, cited in Lu, 2020). As a first consequence of our thesis, we can seek out from this story the impact of the Country-of-Origin effect (COO) developed below on the companies selling in the 90'. Therefore, the group decided to hold its position in the French market but with new strategies. As the first market penetration was led by selling skincare products and faced a lack of brand and country recognition from French consumers, AmorePacific oriented its strategy on two central pillars: a change of selling products and an image modification (Lu, 2020, p. 40; AmorePacific, 2021).

First, AmorePacific decided to switch from selling skincare products to perfumes. Indeed, French consumers' loyalty differed between these two products. French consumers had lower brand loyalty regarding perfume which eased the market penetration of AmorePacific. On top of switching products, AmorePacific decided to establish a licensing contract with French fragrances Lolita Lempika. Through the image of French female designer Lolita Lempika, they succeeded in expanding their activity in France and

also to export to other European countries. This "foot in the door" technique allowed them to develop other brands such as Sulwhasoo skincare. Indeed, this luxury brand succeeded in penetrating the French market, especially with the rise of corner shops of the brand in the Galeries Lafayettes (Ahssen, 2018). Although this venture was seen as a success, recent years show another aspect of the AmorePacific European venture. Lolita Lempika decided to end the licensing with AmorePacific in 2016 to remain under the family activity (Frachet, 2016).

2.4 The country image

Previously, we explained the recent economic and cultural evolution of Korea. That evolution has a crucial role for brands. Indeed, brands have their own image they strategically choose to put forward, but the image of the country they belong to can have a role. First, we will explain this concept of nation branding that will be highly important for building a framework and preparing the interviews. Second, we will develop the concept or country of origin that directly impacts purchasing intention. Third, we will discuss the notion of ethnocentrism that can be a barrier when trying to penetrate a foreign market. Finally, we will explain the way those notions can be linked to the Korean case.

2.4.1 Nation Branding

The Nation Branding emerged through Keith Dinnie's book "Nation Branding: Concepts, Issues, Practice" in 2008. The notion of Nation Branding is defined by "the unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all of its target audiences" (Dinnie, 2008, p. 15). Through this concept, a nation is like a brand, much like a company. The branding of a nation's image mainly attracts different stakeholders: companies, investors, consumers, tourists, etc... In other words, the aim is to develop a positive image of a country to develop businesses where the country is involved. A country may have several levers to improve and monitor its image to leverage this nation's branding. The two most essential elements that we want to focus on in our study are: the national companies' influence worldwide and the soft power generated thanks to the cultural aspect.

On the one hand, the notion of "soft power" theorized by Joseph Nye in 1990 is the phenomenon in which "*one country gets other countries to want what it wants (...) in contrast with the hard or command power of ordering others to do what it wants"* (Nye, 1990, p. 166). Hence, a cultural dimension is here a critical element of this soft power. Well-known with the cultural soft power of the United States, the Korean soft power is also increasing through its culture: the Hallyu. We explained that more in detail already in part 2.2.2.

On the other hand, companies play a fundamental role in the image of a country. Indeed, its image is influenced by its national representation, which is how the international companies sell their product abroad (Dinnie, 2008, p. 22). This changes stakeholders' way of seeing a country, clichés, and stereotypes that are in part correlated to companies' images. For example, the identity of Germany is often associated with quality and rigor because of the parallel with automobile companies such as Volkswagen or Mercedes, whose slogan is "The best or Nothing" (Joseph, 2013, p. 4). In Korea's case, some big

company names make the country better-perceived thanks to Samsung, Hyundai, LG Electronics which are internationally famous brands.

In our thesis, the notion of Nation Branding will be considered and discussed. Indeed, as Korea became influential in consumers' minds, it could affect the purchase intention process of a foreign product. The role of Nation branding will be to evaluate the impact of Korean cosmetic firms on the Korean brand. Furthermore, thanks to Korean cosmetic leaders, such as AmorePacific or Tony Moly, it will be interesting in our study to evaluate the perception of French consumers and professionals of the Korean brand and if they see this country as a reference in cosmetics production.

From a business perspective, the fact that the goal is to attract stakeholders, one can hardly deny Nation Branding can improve international sales and foreign market penetration of national companies by the influence of the country name. Thus, as a virtuous cycle, there is an interconnection between the country's image and the company's image and vice versa. This phenomenon of the impact of a country's image on the company's performance abroad is conceptualized as the Country of Origin (COO).

2.4.2 Country-of-origin

The **country-of-origin** means the brand or the manufacturer's product is associated with its home country (Saeed, 1994, cited in Tjoe & Kim, 2016, p. 67). COO effect has been mentioned and studied through plenty of research (Khang, 2020; Chryssochoidis et al., 2007; Magnusson et al., 2011; Verlegh, 1999). The country-of-origin effect can be summarized by the potential matter of the product's origin for the purchase intention. This can be translated by the question, *"How can the specific product origin impact the **purchasing intention** without considering the product performance?".* Several elements can provide hints to the consumers; the most common one is the inscription "*made-in*" written on the products. Still, companies can improve their country-of-origin effect by linking their image to their country of origin more robustly. Ikea opted for this strategy by adopting the blue and yellow colors for their shops, which are the two colors of the Swedish flag, or by giving their products Swedish names, even if they are challenging to pronounce abroad.

According to Chryssochoidis et al. (2007, p. 1520), the country-of-origin effect *"is an obscure, intangible obstacle that a product (or service) confronts when entering a new market."* In other words, the COO effect is the impact of a country's image on a product. This is interesting to link the COO effect to the Nation branding one mentioned above. Indeed, it is clear that there is a strong interconnection between these two effects. As a virtuous circle, the Nation's branding impacts the sale of its national company by the notoriety this country may have. Vice versa, the Nation branding relies in part on the fame of its national companies to promote their image. When one has country-of-origin knowledge, it contributes to providing a more positive behavior to the consumer who intends to purchase a foreign product (Heidarzadeh & Khosrozadeh, 2011, cited in Tjoe & Kim, 2016, p. 68).

In our study, we will use those two effects in the Korean cosmetic industry. The aim is to evaluate if Korean cosmetics have a competitive advantage because of their country of origin. In other words, the goal is to assess if, in the consumer perception, a Korean

cosmetic product is considered as qualitative, innovative, or if the Korean image may have a bad image in their perception.

2.4.3 Ethnocentrism

The concept of ethnocentrism is usually defined as *"the universal proclivity for people to view their own group as the center of the universe, to interpret other social units from the perspective of their own group, and to reject persons who are culturally dissimilar while blindly accepting those who are culturally like themselves"* (Booth, 1979 cited in Shimp & Sharma, 1987, p. 280). One can extend this ethnocentrism to consumer behavior, which is what Shimp and Sharma did by creating the "CETSCALE" (Consumer Ethnocentrism Tendencies Scale) (1987, p. 281). Consumer ethnocentrism has some characteristics: a superior feeling for their country's product and prejudgment against imported products (Tjoe & Kim, 2016, p. 66). In the beginning, the term "consumer ethnocentrism" was created to represent the beliefs of American consumers (Shimp & Sharma, 1987, p. 280).

Consumer ethnocentrism is an exciting notion to consider when studying French consumers as it can reflect the level of discrimination towards foreign products (Baughn & Yaprak, 1996, cited in Tjoe & Kim, 2016, p. 68). Therefore, we will try to understand if ethnocentrism can influence the purchasing intention of Korean products.

2.4.4 The Korean case and the Hallyu: country image, COO and purchase intention changed

Thanks to the Korean Wave, Korea's image changed people's perceptions. Korean products like cosmetics, electronics, and those related to mobile phones were adopted more easily (Yu et al., 2012, cited in Tjoe & Kim, 2016, p. 68). Tjoe's and Kim's study analyzed the impact of the Korean Wave on the purchase intention of Korean products in India (2016). Through their quantitative study, they got the result that the Korean Wave positively impacted the purchasing intention as consumers got a greater perception of Korea. This is explained by the fact the country was perceived more positively, which implies that Korea as a country of origin became more attractive.

Tjoe's and Kim's study is quantitative and also based on the Indian market (2016). We want to inspire ourselves from this study and analyze the French market. We wonder how Korea as a country of origin is perceived in France and the consumer's ethnocentrism. Tjoe and Kim also faced a limitation: they had very few variables as they were doing a quantitative study. As we will be doing qualitative research, we will have a broader and better understanding of other impacts of the Korean wave on French consumers.

2.5 Product acceptance and Consumer Behavior

In this part, we seek to compare the French and Korean expectations related to a product. Furthermore, there is the notion of product acceptance that is key to understanding a purchasing intention. Tjoe & Kim (2016, p. 67) explain that the purchase intention refers to: "the consumer's deliberate plan to buy or purchase a product in the near future." Those notions will help us understand some brand strategies and shed light on why Korean products succeeded in the French market.

2.5.1 Company positioning and competitiveness

To enter a new market, companies need to develop a business strategy to ensure the well-development of this new journey. Many authors developed the notion of business strategy and proposed a framework for it. Whittington et al., (2020, p. 205) focused on four big pillars of **strategy orientation**: 1) cost leadership strategy 2) differentiation strategy 3) cost focus strategy 4) differentiation focus strategy. The cost strategy and cost focus strategy rely on getting a competitive advantage in front of competitors by always offering the lowest price on your products or in a range of your products. Several examples of companies can be identified such as Easy Jet which offers low-cost flights. There are also food retailers such as Lidl or Aldi which mainly created a low-cost brand of food products they sell in their stores. On the other hand, the differentiation strategy and focus differentiation strategy bet on getting a competitive advantage by providing a specific aspect of their product or service that competitors cannot provide (Whittington et al., 2020, p. 209). This differentiation can be wide and made on the product itself, the services companies bring to consumers, or add-on around the initial product. For instance, luxury companies will provide products of excellent quality (such as Hermes with the Carré). In other words, there are several ways to outstand competitors in a specific market and reach new shares of it.

The differentiation strategy can result in the focusing on a **blue ocean** theorized as a *"new market spaces where competition is minimized"* (Whittington et al., 2020, p. 85). This categorization is a response of **red oceans,** which are shares of a specific market with strong competition and difficulties for companies to enter or keep their shares. Completed by Kim et al., the blue ocean allows companies *"to escape from intense competition over the same market space"* (2008, p. 502). Indeed, this strategy is based on the identification of a specific part of your market where competition is not that intense or even the creation of an extension of your market. By accessing the new part of this market earlier, companies can earn competitive advantages and create new needs from consumers.

Our qualitative study will seek to evaluate the Korean skincare companies positioning. For now, we can already see that the creation of new types of products such as the BB cream and the cushion cream is a result of a differentiation strategy. Even more, the BB cream innovation can result in the creation of a blue ocean by the production of a product that encompasses two others: a sun protection cream and a skincare lotion.

2.5.2 Self-image congruence model and consumer expectation

It is interesting to notice that some successes rely on the fact that consumers believe that the qualities of a product will be integrated into their life (Solomon et al., 2013, p. 5). In this context, one can understand the **self-image congruence model**: consumers are choosing a product because they want to match its attributes or qualities, they want those to be theirs. This implies that there is a special bond being developed, similar to the one that can be created between two people (Solomon et al., 2013, p. 159). This model is useful to understand why brands try to make sure they have a strong identity, so they can attract the consumers accordingly, as it is also advised as a marketing strategy by Kressmann et al., (2006, p. 962)

In Korea, there is a high consumer expectation in terms of quality and creativity. This explains why there is such effort on the packaging aesthetics. They usually try to give the

feeling that the product is a luxury one. One can have a first grasp of the importance of luxury and brand recognition when reading an article in the KoreaTimes (Hyo-jin, 2020). This article describes how students are showing off their high-end products more and more on social media because of peer pressure (Hyo-jin, 2020). Based on this, one can wonder how this good practice was exported internationally by Korean brands. We will try to study this further when collecting primary data.

In France, the name of the brand does have importance for consumers when buying a product. Indeed, a Mintel study in Europe revealed that only 30% of the French population trust the cosmetic industry (Bruel, 2018, p. 33). It is a barrier to overcome Korean brands, mainly because skincare products are not as popular in France as in Korea. Therefore, switching from one brand to another would not be easy, which implies that the lack of knowledge of Korean brands would be a barrier to face to convince French customers. This also suggested, as explained previously, that the increased popularity of South Korean culture directly affected consumption. Regarding the packaging, the design does not seem to have a decisive importance for French women compared to products in Korea but it is more about giving a reason for the purchase. Korean consumers are ready to pay the price to have the best appearance they can when in France, the price is not especially the only incentive. For French consumers, as underlined in IndexPress, the product needs to offer qualitative, different, and added value (Carrel, 2018, p. 14)

2.5.3 Product acceptance and social media

Zara explained that a brand is based on different components (1997 cited in Aiello et al., 2009, p 5). **Recognition** has a crucial role in consumers' purchasing intention. Indeed, the identificational component that helps the customers to distinguish this very brand from another one brings brand awareness, as we mentioned before, and therefore brand recognition. (Zara, 1997 cited in Aiello et al., 2009, p 5). Social Media has a new very special importance now for consumers. As underlined before, it is important to stay in the customer's minds and new technologies brought our new possibilities to do so. We already mentioned some marketing strategies to foster attraction and sales. As part of a company's strategy, one can identify influencers (Brown & Fiorella, 2013, p.78). Nowadays, you have different levels of influencers that are not just at a macro-level (actors, other brands) but also a smaller one like family, friends…). Social media is also a place where the product can be placed around a person and benefit from its image and audience. This is important to underline this phenomenon so one can understand the different strategy and therefore affect consumers and product acceptances. Cornewell & Maignan (1998, p.12) underline that advertising is about reaching a large number of viewers when sponsorship will focus on attracting active viewers.

Also, one shall not underestimate ambassadors and influencers. Internet influencers are also becoming especially popular when it comes to Generation Z, those who are born between 1996 and 2010 (Carrel, 2018, p 42). Even Sephora tried to use the community feelings created by social media to foster fidelity and sales, through a new website "Generation Sephora" (Carrel, 2018, p 42). Therefore, it is a critical phenomenon to take into account. Since the pandemic, products sold online have increased. In the future, maybe the importance of influencers will become a more powerful strategic tool for Korean brands in France.

Partnering with a recognized and acknowledged brand can also be a great strategy, and it is an approach considered through different angles by some brands. It is the case of AmorePacific Corporation that successfully made a partnership with Christian Dior regarding the use of cushion technology, according to Premium Beauty News (2015).

Social media is not the only way to attract consumers, there are also variables. For instance, French consumers give great interest to parapharmacies to buy skincare products as underlined in IndexPresse (Carrel, 2018, p 24). Indeed, it gives the product some qualitative aspect and some legitimacy as there is a medical aspect (Carrel, 2018, p 24). Hence, it is an exciting element to take into account. First, regarding the **distribution strategy,** it can be adapted and used as a lever by Korean brands. Second, as it shows a preference towards a medical environment to buy skincare products, distribution can be a significant strength for the marketing of Korean brands as they enjoy using traditional medical ingredients in their formulation (Carrel, 2018, p 19).

As part of some Korean brands' strategy, gaining recognition can be essential. However, at some point for some Korean brands, not being recognized as Korean was part of the strategy. As mentioned before, there is the case of Lolita Lempicka that chose a **segment** strategy to gain recognition. They successfully focused on the fragrance market, where there is less strong loyalty (김주현, and Kim, Joo H, 2003 cited in Lu, 2020, p. 45). Also, the brand was trying to hide its Korean origin as Catherine Dauphin, director-general of AmorePacific's European operations underlined it (Kim Jung cited in Lu, 2020, p. 43).

Understanding the way Korean companies made their choices about the distribution place, but also in terms of a media strategy to create a brand awareness should help us understand better the success of their skincare products.

2.6 Conclusion and framework

Through our secondary research, we came up with different conclusions to understand how Korean brands succeeded in making it on the highly competitive French market.

Regarding Korean skincare products, we now understand how they became so popular but also so advanced. Even though Korea used to be a country late in its economic development process, nowadays it is the 10th economic power. One of the new strengths of Korea is its beauty industry. In Korea, there is **a social pressure** of beauty, related to their history and religion. Looking good and young is not only about individual satisfaction, it is a mandatory element to succeed in your career and love life. One can even change their fate. This has a direct impact on the Korean consumer that uses five to nine products to take care of their skin and on the Korean brands that keep progressing on their products. This social context led Korean brands to become very **innovative** and acknowledged worldwide with some famous products like BB cream. *Thanks to our interview, we want to understand why those products especially became so popular in France.*

Having good products does not mean one can make it on the international market. There is an important element that made the difference: the **increase of Korea's soft power.** Thanks to the rise of the Hallyu, not only in France but worldwide, Korean brands became stronger including the cosmetics ones. This gave brands some great advantages as they

could **brand their nation** and not only their products. It is providing an element of **differentiation** in the mature French market. This had a direct impact on the French purchasing intention as the **country of origin is now recognized** by the consumers. An element that Korean brands will keep having to face as a barrier will be the **ethnocentrism** of the consumer: the preference towards French brands. *Through our interview, we wish to understand better why a consumer could be attracted by a Korean brand and how noticing this country of origin could influence their purchasing intention. We will also make use of the CBBE theory to build our questions and help us analyze.*

Korean soft power and qualitative products are great elements to reach success but this is not all. Korean brands adopted different **strategies** to make sure to gain a market share. It includes partnering, working on brand recognition…Also, **French consumer behavior** is different from Korean one. The importance of the recognition of the brand, the ambassador, and the packaging plays differently. *We want to understand better how Korean brands tried to adapt to the French market and consumers, be it through their strategies but also through their products.*
To summarize all the discoveries from our literature review, we created Figure 3. On the left side, one shall find all the sections studied in this chapter. In the middle column, one shall find the main findings from our secondary data. Finally, on the right side, there is the element we wish to investigate during the interviews to help us answer our research questions.

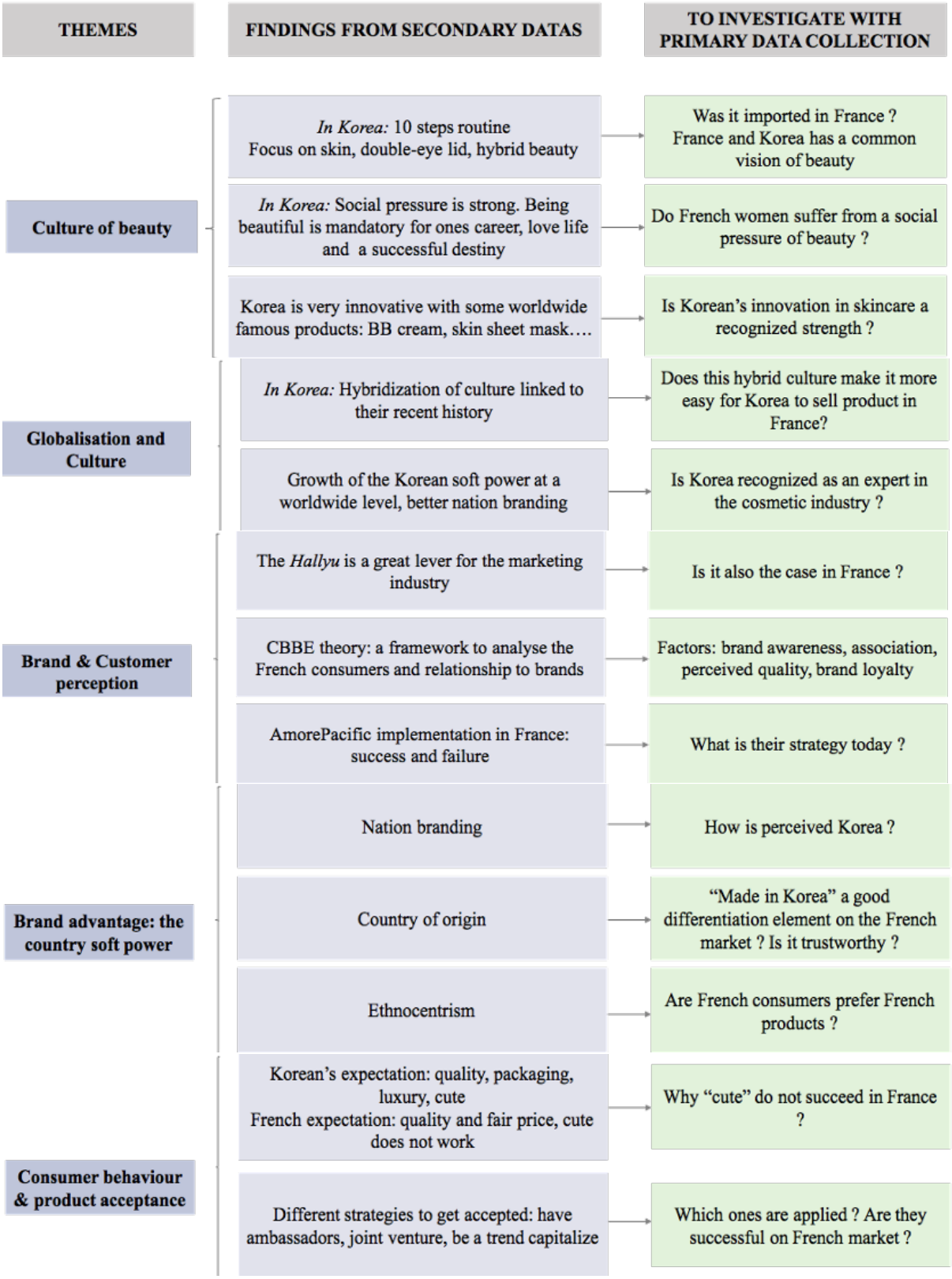

Figure 3. Secondary data finding and elements to investigate with the primary data collection

3.0 Scientific Method

This section will present the different types of philosophical assumptions and select the ones we believe relevant for our thesis. Then, after explaining the key concept of the different paradigms, we will explain deeper the interpretivist paradigm and the reasons why it is the one chosen for our thesis. Finally, we will explain our choices regarding theory and methodology.

3.1 Philosophical assumptions

The purpose of research philosophy is to understand better the findings of our study. Therefore, when starting a research project, it is essential to put forward what we know. Philosophical assumptions include different concepts: epistemology, methodology, and axiology (Eriksson & Kovalainen, 2011, p. 4). Those assumptions will be the basis of our research.

Ontological assumptions settle on the nature of reality, the relationship between people (Long et al., 2000, p. 190). One can categorize ontological approaches into objectivism, constructionism, or subjectivism (Eriksson & Kovalainen, 2011, p. 14). Objectivism considers that a phenomenon exists independently, in multiple realities, they cannot be influenced by other actors, whether they are conscious of it or not (Long et al., 2000, p. 191). Therefore, it becomes possible to explain any universal phenomenon and replicate the study method (O'Gorman & MacIntosh, 2015, p. 57). Subjectivism is focused on a reality based on the experience and perception of one person (Long et al., 2000, p. 193). Constructionism would consider that reality results from social constructions; it is built up through social interaction (Eriksson & Kovalainen, 2011, p. 14). In our thesis, they are different realities as individual perception can change according to their perception of the world and their interactions. Therefore, we believe our assumptions are subjectivism. We believe that consumers have a perception of skincare products different from the professionals' perception.

Epistemology is about the process of obtaining valid knowledge and transmitting it (Long et al., 2000, p. 190). It helps to be able to check the validity of a statement. As researchers, we will try to connect assumptions we already know (ontology) with some we will develop (epistemology) (O'Gorman & MacIntosh, 2015, p. 59). In our research topic, we know that South Korean products are successful in France, which is surprising as France is a significant leader in the cosmetic industry, and we will try to explain why it is the case. Epistemological assumptions can vary with the paradigm chosen: positivism or interpretivism (Collis & Hussey, 2014, p. 47). First, epistemological assumption can be foundationalist or not, meaning obtaining some definitive knowledge (Eriksson & Kovalainen, 2011, p. 16). Second, the role given to the researcher can also be considered differently depending on if one should consider him as part of the process, or, on the contrary, if he is detached from the process (Eriksson & Kovalainen, 2011, p. 16). Third, the relationship between an idea and an object can take different directions and change epistemology (Eriksson & Kovalainen, 2011, p. 16). In our case, knowledge comes from consumers and professionals' perception, so they are subjective evidence. As we both also are French consumers, we are part of phenomena studied, so interpretivism seems to be the paradigm in accordance with our research.

Finally, the **axiological assumption** deals with the role of values (Morgan, 2007, 58). The positivist approach would consider the researcher is independent of the study (Collis & Hussey, 2014, p. 47). In our case, an interpretivism paradigm appears as a better approach. We deal with consumer behavior in France, results might be relatively different depending on the interviewees and their acceptance of Korean skincare products.

To summarize our philosophical assumption for this thesis we created Figure 4., which you can find below.

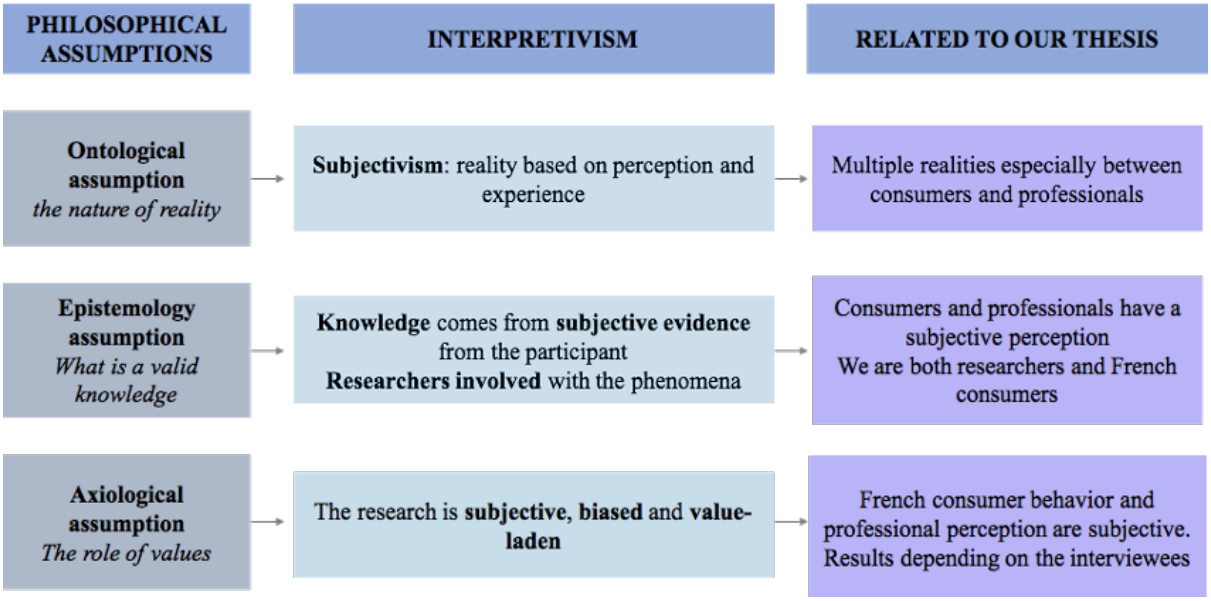

Figure 4. Assumptions of the interpretivist paradigms (adapted figure). Source: Eriksson & Kovalainen (2011, p. 14)

3.2 Paradigms: an interpretivist view

According to Collis and Hussey, to develop our study, we must select a philosophical framework to elaborate our study, called *paradigm* (Morgan, 2007, 49). As we previously explained, philosophical assumptions go in pair with a paradigm. By introducing the different types of assumptions and explaining which ones we select for our studies, an interpretivist paradigm already appears as a viable solution for our research. We will now develop deeper the two main paradigms: the positivist and interpretivist one and their different philosophical assumptions.

On the one hand, a **positivist** approach relies on empirical testing. Positivism is often associated with natural and social sciences (O'Gorman & MacIntosh, 2015, p. 60). Furthermore, methodology procedures are central and can be applied to the study of human social action (O'Gorman & MacIntosh, 2015, p. 60). In other words, a positivist approach tries to produce knowledge by testing hypotheses or principles through experimentation. According to Saunders et al., the aim is to develop unambiguous and accurate knowledge (Saunders et al., 2019, p. 144). Through this paradigm, the research is value-free, which implies objectivism from the researcher (O'Gorman & MacIntosh, 2015, p. 60). This paradigm is often favored as data are exact (O'Gorman & MacIntosh,

2015, p. 60). With this approach, researchers' goal is to extract *"pure data and facts uninfluenced by any human interpretation or bias"* (Saunders et al., 2019, p. 144). In other words, this approach tends to bring general laws based on data collection that are not interfered by bias.

On the other hand, **interpretivism** is a paradigm that was conceptualized in response to the positive one (O'Gorman & MacIntosh, 2015, p. 64). It is considered that: *"social sciences seek to 'understand' social phenomena in terms of 'meaningful' categories of human experience. Therefore, the 'causal functional approach of the natural sciences is not applicable in social inquiry"* (O'Gorman & MacIntosh, 2015, p. 65). Therefore, contrary to the positivist paradigm, interpretivism is subjective as it aims to understand the population they are studying. The most crucial element is to understand the behavior. Researchers would be implicated in the research, and their beliefs would influence the interpretation (O'Gorman & MacIntosh, 2015, p. 65). This implies there are multiple realities. This philosophy relies on the assumption that the social world cannot be studied the same way as phenomena are studied (Saunders et al., 2019, p. 148).

Our study focuses on the confrontation of French consumer behavior with the purchasing opportunity of a new cosmetic product produced by new entrants in the market. This disruptive arrival of companies from a different country - which is here from South Korea - may imply different realities in the consumer perception because it deals with their affinity with this new culture and their acceptance of new solutions. This means they can have different perceptions and, therefore, different realities. We seek to try to *understand* French consumer points of view and to see through their eyes. It is not about measuring a natural phenomenon, but more studying social behaviors. Also, the phenomenon studied here is the consumer behavior, and our investigation will be different depending on the subjective affinity of interviewees (Collis & Hussey, 2014, p. 44). This choice is linked to one of the criticisms of the positivist paradigm because *"People cannot be understood without examining the perceptions they have of their own activities"* which is here consumer habits (Collis & Hussey, 2014, p. 45). That is why we believe the **interpretivism paradigm** is the most appropriate to develop our thesis. Indeed, this approach will help us create and build a framework regarding reactions and consequences of this phenomenon through the consumer behavior aspect. As consumer behavior can vary depending on each consumer, we believe that adopting an interpretivism paradigm is the most relevant for our thesis.

3.3 Research approach

After explaining our philosophical assumptions and our paradigm selection, we will now focus on theoretical aspects of our research. To build our research, we can choose three different approaches of research: **the deductive, inductive, and abductive approach**. Selecting one of them is an essential step as it will influence the way of gathering data and interpreting them (Saunders et al., 2019, p. 157). Also, it includes selecting a general methodology and our research strategy (Saunders et al., 2019, p. 157). The specificity of those three types of research is about the method we want to develop in our primary data collection.

In a **deductive approach**, the aim is to select a framework and then test it with empirical data (Thomas, 2006, p. 238). In this approach, one would explore relationships between

several phenomena. For instance, through correlation analysis, factor analysis… (O'Gorman & MacIntosh, 2015, p. 51). The logic is to confirm or modify an existing theory through rigorous tests to check the validity of a proposition (Thomas, 2006, p. 240). This approach helps to build up a general law which explains this phenomenon. They are usually six steps to a deductive approach: having a hypothesis, deducing a proposition to test via existing literature, comparing it with the existing theory, testing the premises with collected data, and finally, relatively to the result of the test, the theory is corroborated, rejected or modified (Saunders et al., 2019, p. 154). If the theory is changed, the process has to be redone. To summarize it, this approach requires a highly structured methodology to facilitate replication (Saunders et al., 2019, p. 154). It is also an important matter to guarantee validity. This implies that another characteristic of this method is a generalization (Saunders et al., 2019, p. 154). It is necessary to be able to generalize a sample. Therefore, it is often associated with quantitative data analysis (O'Gorman & MacIntosh, 2015, p. 71).

On the contrary, the **inductive approach** is a reverse approach. The goal of this approach is to start from the specific to then try to establish general conclusions. Indeed, researchers begin with empirical findings; then, they develop general laws and frameworks through primary observations (Collis & Hussey, 2014, p. 7). Simply put: theory follows data. This approach is interesting to understand better the nature of a problem (Saunders et al., 2019, p. 155). It is most often used when analyzing qualitative data (Strauss & Corbin, 1998, cited in Thomas, 2006, p. 239). In the end, conclusions made through interviews will usually take the form of a conceptual framework (Saunders et al., 2019, p. 154). Even if the final theory developed in this research matches an existing one, the process is different because researchers start from collected data and then conclude with a theoretical framework. The inductive approach is a response to the deductive method, and this for several reasons. The main reason is the rigidity of methodology implied by the deductive approach (Saunders et al., 2019, p. 154). With an approach that relies firstly on the data collection and the interpretation of human beings, the inductive one allows researchers to potentially reach new ideas and classify causes to fulfill their framework.

The last approach is the **abductive one.** A common point of the deductive and inductive approach is that the methodology is very linear: from "*theory to data*" or "*data to the theory*" (Saunders et al., 2019, p. 156). The abductive approach is different. It merges those two former approaches; it is about moving back and forth between data and theory (Saunders et al., 2019, p. 156). Abductive approach starts with observations (Saunders et al., 2019, p. 156). Then, one would obtain a significant amount of data to study the phenomenon and identify patterns (Saunders et al., 2019, p. 156). Next, these explanations would need to be integrated into a framework. Finally, one would test it to accept it, reject it or revise it (Saunders et al., 2019, p. 156).

Our literature research as secondary data appears as an essential element for selecting an approach. We noticed the amount of previous research covering this topic is low. Studies showed the importance and development of Korean skincare products in the past, but new studies observing this phenomenon are not enough. Also, the perspective of the French consumer behavior approach through the Korean skincare companies' strategy still needs to be developed. Finally, we also highlight the lack of study regarding specificities of the French market. Indeed, too few articles deal with the market penetration of new Korean cosmetic companies in a historical cosmetic market as the French one: the market is composed of historical leaders of the global cosmetic market. In that sense, **inductive**

research appears as the most efficient way to deal with our topic. Indeed, inductive research *"describes a study in which theory is developed from the observation of empirical reality"* (Collis & Hussey, 2014, p. 7). This approach makes sense to elaborate and develop a framework from gathering our primary and secondary data to explore this phenomenon.

The literature will help us extend our knowledge. However, until now, we noticed the articles are not very recent or specific enough. Even though there is a gap identified, we can capitalize on this to prepare our interview guide and our primary data collection. Then our secondary data will help us to develop our theoretical framework and build our interview guide. After leading our interviews, we believe the gathering of primary and secondary data will lead us to establish a framework explaining the Korean phenomenon in the French cosmetic market and its acceptance by the population

3.4 Methodology: a qualitative study

Our research can rely on a qualitative or quantitative study and in this section, we will present to you those two methods (Gephart, 2004, p. 455). We concluded that the qualitative study is appropriate for our research by presenting our philosophical assumptions, paradigms, and approach. As explained previously, **qualitative research** fits as we have an inductive approach and an interpretivist philosophy (Saunders et al., 2019, p. 155). We will explain why this is the case for our research.

On the one hand, the **quantitative study** can be transcribed as a statistical analysis of a larger pool of answers (Collis & Hussey, 2014, p. 6). Also, answers are usually fresh ones and come from a survey spread to a population targeted. Then, the aim is to link several variables to explain variations of different phenomena. This is common in a thesis targeting consumer behavior to have this type of study. Thanks to it, the pool of answers is more extensive, and findings can lead quickly to larger generalities.

On the other hand, **qualitative study** means interpretative methods (Collis & Hussey, 2014, p. 6). This approach aims to understand the "why" of a problem and interpret the subjectivity (Merriam, 2015, p. 126). We can go deeper with the interviewees, which we could not have had with statistical analysis. Therefore, this opens a wider field of possibilities and understanding of one's perception. The questions are more open and lead the interviewee to develop his mind and explain his thinking about a specific topic (Merriam, 2015, p. 128). On top of that, we can get them more comfortable to share their perception truthfully and entirely by interviewing people. Relatively to the type of interview we run, we can develop a conversation with the interviewees, giving them the possibility to mention a maximum of information they could forget to mention by themselves in other circumstances.

As we explained before, choosing a qualitative study follows the logic of an interpretivism method. We realize that studying the consumer behavior area through qualitative research is not usual. Still, we believe that a qualitative study is the best answer to the existing literature for this specific topic. Indeed, there would be a risk of missing some answer elements by making a quantitative study. We are not experts in this industry, and we believe that building quantitative research to orient interviewees through a survey may let us miss some critical data. This thesis will then open several answers and elements

to explain the phenomenon that appears in the French market. Leading qualitative interviews of consumers and cosmetic professionals will help us broaden the topic and bring new and fresh insights from the arrival of Korean cosmetics in the French market. Also, studying consumer behavior involves different ways of consumption and so a subjectivity of reality. This argument drives us to develop an interpretivist study and collect the perception of people studied through interviews.

3.4.1 Type of sample: French consumers and professionals

To realize research with a collection of primary data, it looks hard or impossible to gather everyone's opinion of a global population. These difficulties are mainly because of the time restriction. Although it would be more accurate to collect data from a whole population in terms of data's veracity, researchers have to restrain the data collection from studying phenomena of their study then. To solve this issue, researchers sample a population. As described by Collis and Hussey, a sample is a *"subset of a population"* (Collis & Hussey, 2014, p. 51). In other words, the technique is to select and study only a part of a studied population. We are running an interpretivist study, so we will investigate a small sample (O'Gorman & MacIntosh, 2015, p. 60). We decided to have two categories in our sample: the professionals and the consumers.

Professionals would be individuals working in the cosmetics industry in France or the French sector. We are interested in getting their perspective because we believe they perceive the market differently from the consumers. Also, we wonder about their perception of Korean skincare products: maybe they perceive Korean cosmetics companies' strategies that could be valuable for our research and analysis when comparing it with the consumers' answers. **Consumers** will be French individuals buying cosmetics products. We are interested in getting their perception to understand how they feel about those new types of products they have access to. For example, we can discover why they would choose a product over another one and how they feel about a Korean product: if they trust the quality, what they think about the packaging, or what is their perception of this foreign brand.

3.4.2 Methodology to contact the interviewees

We explained that we aimed for a small sample made of French professionals and consumers. The next step is to decide on who we are going to interview. Several processes are possible to reach interviewees for a thesis: **snowball sampling, purposive sampling, and natural sampling** (Collis & Hussey, 2014, p. 132).

We can define snowball sampling as selecting the first round of participants and finding new ones thanks to the interviewees' network (Collis & Hussey, 2014, p. 132). This type of sampling is applied when researchers need interviewees with experience and not random ones. This sample is also adequate when the researchers do not have an extensive network to answer with an expert vision on their specific topic. To solve that, the researchers will start with experts and then snowball on their respective networks to reach other experts. The purposive sampling is also based on a selection of interviewees. The differentiation with the snowball sampling is that there is only one selection of interviewees initially, and researchers do not rely on the interviewees' network to find more respondents (Merriam, 2015, p. 129). Natural sampling occurs when inside a targeted population, researchers do not influence the selection of interviewees (Collis &

Hussey, 2014, p. 132). This technique is based on the principle that interviewees are easily accessible, and there is no need for specific people to answer the interview.

Regarding our objectives and the current resources we have, we decided to adopt a **snowball sampling**. Thanks to our network, we do have relatively easy access to consumers. However, having access to some professionals working in the cosmetics industry is more complicated. For example, our network allows us to interview a worker in Sephora: a leading company in the cosmetic retail industry owned by the group LVMH. This interview is interesting because we can get a very operational perception of cosmetics products and customers' purchases. Our network also offers us the opportunity to interview a seller working for X company: the world's leading specialty chemical company. This person is in charge of selling raw materials for cosmetics companies in France. Her perspective is interesting as she has previous experience as a skincare formulator. She can give her a professional view of the demands of the market and the strategy of the French company facing Korean products. However, as our network in the professional industry has its limitations, to get the opportunity to interview more relevant people, we will ask them if they agree to put us in contact with someone in their network. As it is someone in their network, we also make sure to have an almost certain probability of answering our request. This means finding interviewees should be smooth this way. That is why snowball sampling is an appropriate method for us.

Regarding professionals, we originally had two contacts that agreed to share their network with us. We were especially successful because they all wished to help us and share their contact with us. We sadly had to refuse more interviews in order to have a proper time to analyze the data and interpret it. **Regarding consumers**, it was an easier process to find some interviewees. Still, thanks to the snowball sampling, we got the opportunity to interview two more people and to integrate them in our focus group.

3.4.3 Methodology of the interview

There are several ways of leading an interview in a qualitative study; one can run: **an unstructured and a semi-structured interview** (Collis & Hussey, 2014, p. 133).

On the one hand, the unstructured interview is based on the principle of not preparing questions. The aim is to let the interviewee speak as freely as possible. By asking open questions, the interviewee will not be able only to answer "yes" or "no", and this pushes the interviewee to develop his thoughts and take a position on several subjects (Easterby-Smith, et al., 2012, p. 132).

On the other hand, semi-structured interviews bring other processes. In this type of interview, researchers prepare an interview guide. Then, interviewers build the interview guide on different main topics they want to approach with the interviewees (Turner, 2010, p. 755). A semi-structured interview aims to let the interviewees express their thoughts and position about chosen topics. That is why using open questions is also recommended and usual (Turner, 2010, p. 756). Although there are some prepared questions thanks to the interview guide, researchers are still free to modify their questions, change the order or add more questions regarding the evolution of the interview (Creswell, 2007, cited in Turner, 2010, p. 758). The strength of a general interview guide approach is that it improves the interviewee's opportunity to freely explain his positions to have more insights for the researchers (McNamara, 2009, cited in Turner, 2010, p. 756).

We decided for our thesis to opt for a **semi-structured interview** with the elaboration of an interview guide. It will be the basis of our discussion and will help us to lead the interview. We believe that our literature review as secondary data allows us to select several main topics to develop with interviewees to be then able to answer our research question. As we also know that we are not cosmetic industry experts, the semi-structured interview will allow us to elaborate and adapt our questions throughout the interview.

Regarding the professionals' side, we decided to run **private interviews**. Thanks to this, we believe professionals would be more comfortable to share their knowledge and insights from their companies. For instance, some information could be shared anonymously, however this very same information could be uncomfortable for them to share if in the conversation we were discussing with one of their competitors. Therefore, we believe that doing another type of interview, with a focus group for example, would have raised less insights than private interviews. This is why we decided to run only private interviews with professionals.

Regarding consumers's interviews, as we explained, the aim of this data collection is to have their subjective perception of the market. When individuals start interacting, there is more information being shared, because participants react to what everyone is saying. On top of that, as they are not professionals, there is no hard knowledge to share. In our view, a **focus group** would stimulate imagination and bring more insights on the matter. This perception we just explained before is also based on our previous interviewing experience, when we notice how hard it could be for the interviewees to have inspirations and for the interviewers to try helping them answer without influencing them. Therefore, for those reasons, we decided that focus groups would be more relevant to collect data. As we plan to interview 8 consumers, we decided to split them into 2 different focus groups. The first aim of this separation is to facilitate the data collection and the flow of these focus groups. Indeed, we do believe that it is not an efficient idea to have too many interviewees inside one focus group. The main reason is the potential lack of participation of every interviewee or a too long interview and a diminution of relevant insights due to a interviewees' tiredness.
The second opportunity was the difference of knowledge of the interviewees about this topic. Additionally, to the opportunity to reach casual French consumers, we had the chance to reach French consumers with a certain knowledge of the Korean skincare products. Thanks to that, the division into two focus groups with one of casual consumers and the other with amateurs made sense.

To summarize our scientific method, we created Figure 5., which you can find below.

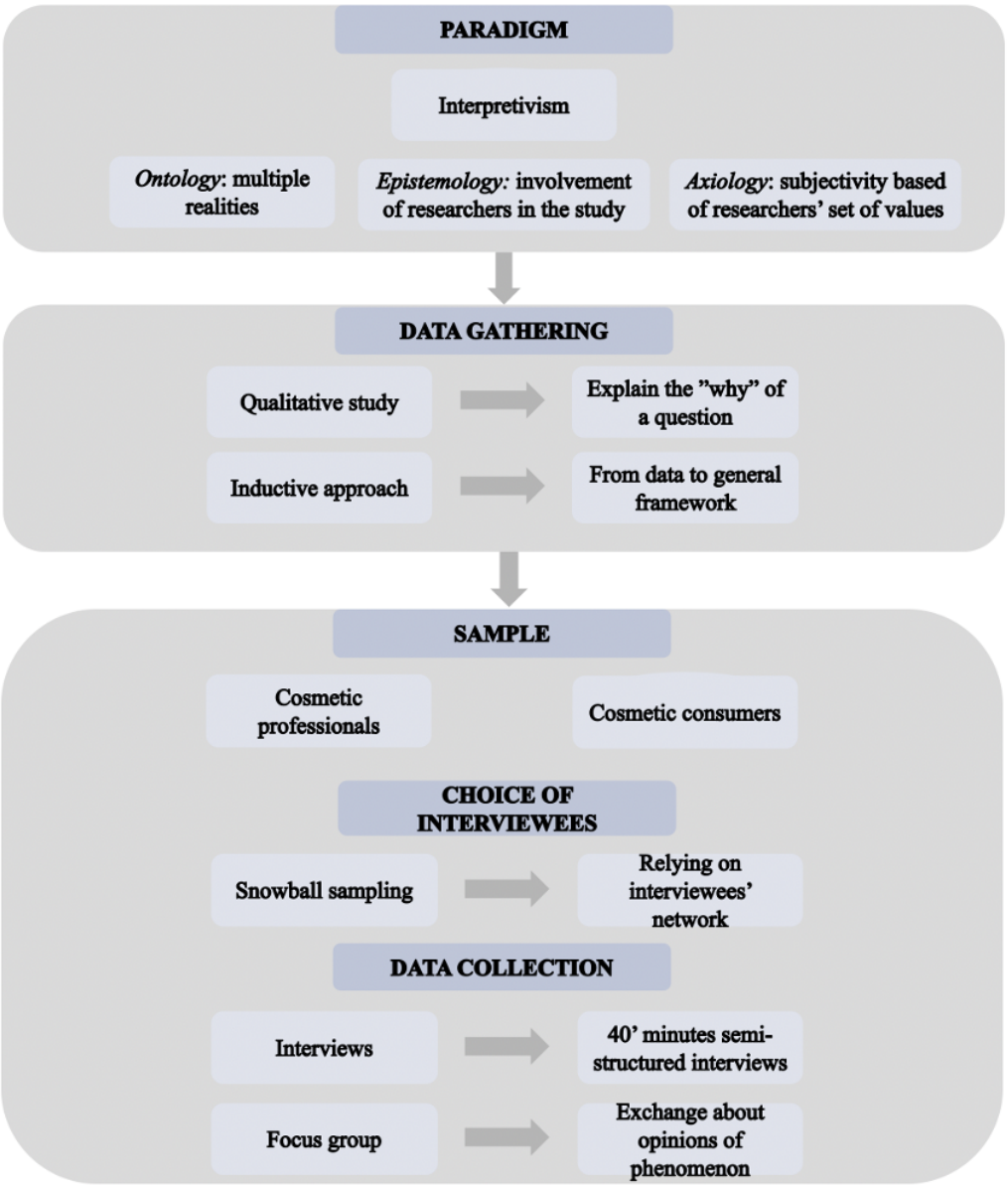

Figure 5. Philosophy and processes of the thesis

3.5 Ethical consideration

Morality and ethics *"represent a set of interconnected principles and ways for making choices."* (Weathington et al., 2012, p. 24). Ethical considerations are essential to ensure that the rights of the participants in our study are respected. There are some common principles we are going to put forward. We will also explain how we applied them in our research.

First of all, our primary collection data through interviews will be based on the ethical consideration of volunteering. In other words, we will ensure that interviewees will agree to do this interview without any pressure or stress that could force them to do it. As presented by Collis and Hussey, and to make sure to avoid them feeling any pressure, there is a need to *"giving enough information to ensure informed consent and avoid*

jeopardizing the purpose of the research" (Collis & Hussey, 2014, p. 32). More precisely, voluntary participation will also be applied during the interviews. Interviewees will have the right to decline a question and not answer it at any time of the meeting.

For our interview process with our participants, we agreed on absolutely following some moral principles. As underlined by Weathington et al. respecting their well-being is critical (2012, p. 25). To do so, we made sure they would have no questions that could harm the participant in any way. Also, we ran a test interview to make sure to get external validation. The aim of testing our questions here is not to understand if our questions are relevant but to make sure no questions are uncomfortable for a participant. In that sense, we will not need to have an expert on this topic to test our interview. In the context of an interview, making sure they do not feel harmed and respect their well-being includes making them feel they are listened to and that their perception and point of view is valuable.

Another essential principle to lead our research ethically was to record our participants' rights (Weathington et al., 2012, p. 29). We record their right to confidentiality. This means that if they wished to, they could be referred to as an anonymous participant in our research. This also means we asked them if they would agree we record them to help us transcribe and analyze their answers. The confidentiality can be total or incomplete. Regarding the name of their company, data they can provide, we assure them at the beginning and the end of the interview that they can, if they want, turn in anonymous information.

Tracy agrees that ethics is a crucial element for a good study (2010, p. 837). She underlines other essential criteria for a qualitative quality study: credibility and sincerity (2010, p. 837). She also said that criteria are critical because they are guidelines for research; it is a structure equivalent to the basic chord structure for a musician (Eiseberg, 1990 by Tracy, 2010, p. 837). Regarding credibility, it is about bringing enough description and concrete details. However, we are going to record the interview if possible and always transcribe them. If needed, we can provide our note, and with the agreement of the participants, we can also provide the audio file. This shall guarantee the validity of our findings. Regarding sincerity, even though we are implied in this research as discussed earlier in this section, we will be self-reflective towards our biases. To guarantee sincerity, we will also make sure to be transparent about our methods. We will also put forward our challenges and limitations in a paragraph dedicated to it.

3.6 Interview guide

When preparing for the interview, we personalized the questions to the type of profiles we were interviewing. To do so, we made a first differentiation between the professionals and consumers. In total, we interviewed 12 people and we prepared five semi-structured interview guides: three different ones for professionals and two different ones for consumers, to make sure to optimize all our interviews. We created Figure 6, an interviewees map representing their specificity and visualizing how we methodologically interviewed them.

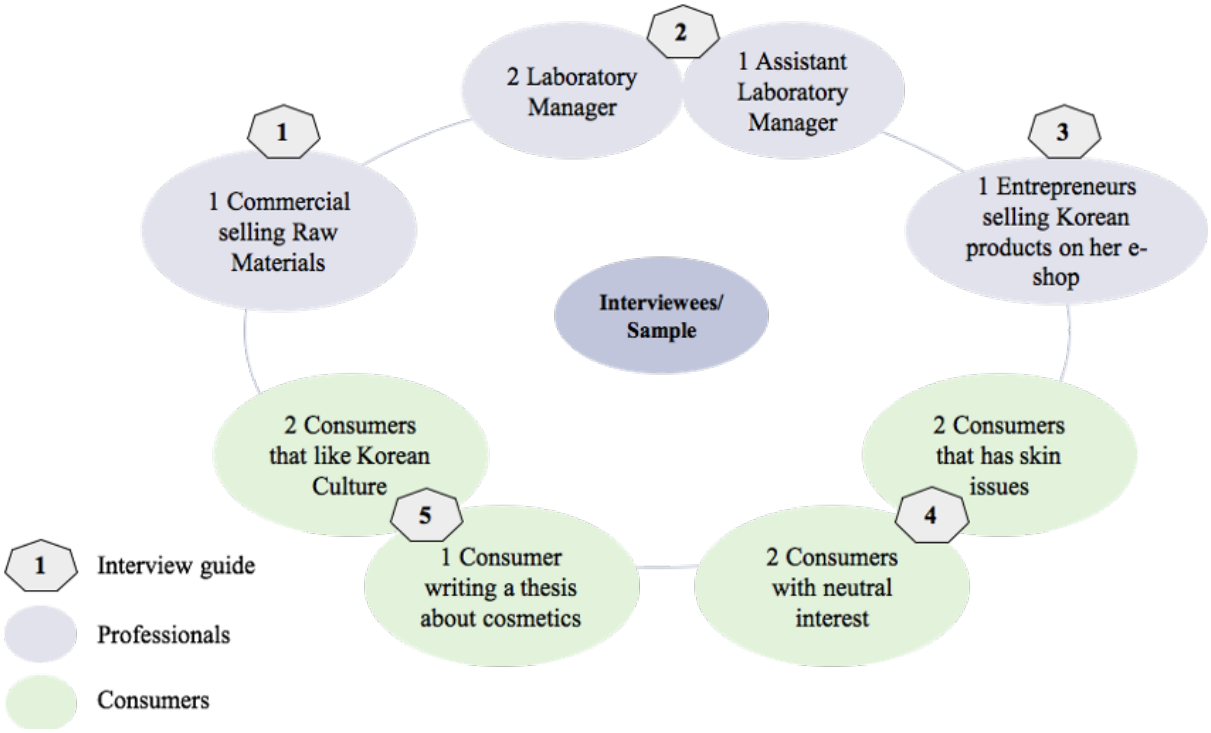

Figure 6. Variety of profile of interviewees and interview guides designed relatively

Regarding the professionals, we separated our questions into 3 main categories. First, we had questions directly about their professional experience, like *"is it a new trend to use Korean raw materials and study their trends?"*. Those questions are designed to help us understand the rising popularity of Korean products and the vision the professionals have regarding Korean products. Then, we had questions regarding their perception of the French market and factors that could influence it. For instance:*"why do you think the BB cream was a success in France ?"*. Those questions are designed to discover why Korean brands made it on the French market through the professional perception. Finally, we had questions about trends and products. With those questions, we seek to find some links between nowadays trends and Korean products.

As you can see in Figure 6., we had very different profiles to get the more complete and broad view possible. Therefore, we adapted the best we could the questions to fit their experience. For instance, the person who runs an e-shop was more focused on the marketing sides and trends. On the other side, questions asked to the Laboratory manager were more regarding the active use, for instance. We designed in total three semi-structured interview guides for our five professional interviews.

Regarding consumers in the focus group, we selected seven people to interview. We decided to separate them into two groups. The first group A was consumers more "expert" regarding Korea or the cosmetic industry. The second Group B were more "average" consumers with different levels of awareness and involvement regarding skincare but without any knowledge regarding Korean skincare. We first asked questions about them and their relationship with skincare products and routine in terms of questions. With those questions, we seek to understand the French consumer better. Then, we also asked about factors that could influence their purchase intention. As Focus group A had more knowledge about the cosmetic industry and Korea, we had more technical questions

asking for some analysis and perception of strategy. On the other hand, Focus Group B had more questions on their global perception as consumers.

To contribute to the success of the focus group, we prepared a PowerPoint with several questions or games. This PowerPoint was good support for the questions. It was also a good ice-breaker as the interviewees did not know each other and could get more comfortable with it. For instance, we had a slide on which there were three skin sheet masks, and they should explain why they would prefer one over the other (*Appendix 5*). This question helped us better view the way they think, perceive products and their needs.

Finally, as all our interviewees were French, we interviewed in their mother tongue to make sure they could express their opinions the best way. Also, as announced before, we started all our interviewees by recalling our interviewees. They had the right not to answer a question and to be anonymous.

4.0 Qualitative empirical findings

In this chapter, we will present the empirical findings obtained from our 12 interviewees. We want to explain the new knowledge we gained from our discussions. The structure and organization of this part is a reflection of our first findings with the literature review and will also include some new elements.

4.1 Profile of interviewees

This thesis aims to collect primary data from two types of interviewees: professionals and consumers of the French cosmetic market. If we consider knowledge like a puzzle, we are trying to assemble each piece of knowledge and perception of interviewees to obtain a global vision. We interviewed a total of 12 French individuals: 7 consumers and 5 professionals.

Regarding French consumers, we want to evaluate their perception of the market and Korean products. For that, we developed two focus groups, respectively of three and four interviewees. Consumers interviewees are women settled in France between 20 and 25 years old. To make sure to represent in the best way the consumers, we interviewed different profiles. Some interviewees had knowledge of the skincare industry on the cosmetic side or the skincare/medical side, some were aware and interested in Korean cultures and products, and some did not have any specific knowledge or interest in Korean skincare.

Table 1. Profile of interviewed consumers

Status	Focus group	Ref	Experience
Consumers	**A**	**1**	Graduated from university in cinema. It has been 10 years since she has been interested by Korean culture and Asian culture in general.
		2	Graduated from an engineering school. It has been 10 years since she has been interested by Korean culture.
		3	Business School Students. Realizing a thesis about cosmetics.
Consumers	**B**	**1**	Graduated from University in Biology. Interested in using "serious" products for her skin condition.
		2	Graduated in Business School in Supply Chain. She is a consumer not aware of Korean cosmetics.
		3	Business School Student in France, interested in the cinema industry. She enjoys using cosmetics products but does not have any specific knowledge about it.

		4	French student in Political Sciences. Lived in China for 1 year. No specific knowledge about Korean cosmetics. Aware of skincare products due to her skin condition

Regarding professionals in the skincare industry, we tried to interview a diversity of professionals. We had the opportunity to interview young and experienced professionals: 25-35 years old and 50-60 years old. We interviewed a commercial selling raw materials, laboratory managers or assistant and e-shop entrepreneur.

Table 2. Profile of interviewed professionals

Status	Ref	Snowball method	Experience
Professional	**1**		Business commercial at a world leading specialty chemical company selling raw materials to French cosmetics companies.
Professional	**2**		Business school student passionate about Korean culture. She lived in Korea. She managed an e-commerce business for 3 years to sell Korean cosmetics products.
Professional	**3**	Provided by subject 1	Laboratory Manager at Uriage Dermatological Laboratories that have designed dermocosmetic products recommended by dermatologists and pharmacists around the world.
Professional	**4**	Provided by subject 1	Laboratory Manager at Naos, a major international figure in skincare with 3 brands: Bioderma, Institut Esthederm, Etat pur
Professional	**5**	Provided by subject 3	Laboratory assistant for a French skincare company. She has great interest in the Asian skincare innovation.

For the sake of our interviewees' privacy, we will not use any names during our discussion and analysis. We will refer to our interviewees by using their reference numbers highlighted in the green column. For instance, we will write: Professional 1 or Consumer FA-1 (consumer in the focus group A with 1 as referenced number).

4.2 Market and French consumers analysis

In this part, we wish to present our findings regarding the French market and the consumers of Korean products. We learn some specificities about their profiles that are important to explain before we go further regarding the findings. We will develop their profile through different aspects: the global brand loyalty of French consumers, their awareness and methodology of purchase, and their purpose when using skincare products. We will then finish by discussing the French market trends.

4.2.1 French consumers of skincare products

A few years ago, French consumers of Korean skincare products were of two kinds. Professionals 2 shared that her customers in 2016-2019, on her Korean products e-shop

were: *“80% fans of Korean culture and the other 20% were consumers looking for some technical products”*. Nowadays, Korean skincare consumers are still two types of consumers, but the separation changed a bit. They are consumers who appreciate Korea or have some knowledge about it and those who do not know about Korea or its soft power (Professional 3). During our interviews, we did notice this strong cleavage between our Focus group A that had more knowledge about Korea, than Focus group B that did not know anything about Korea. This different degree of Korea awareness was used as a tool by the companies, which we will develop that idea later, in part 4.7.

In terms of loyalty, age can be a factor. Our interview with Professional 5 differentiates consumers into two parts: "*older generations and Millennials*." The loyalty to a brand differs from her. On the one hand, older generations are loyal to a brand and a specific product, they are not favorable to change. On the other hand, younger generations are less predictable, they usually change and test new products. Our interviewed consumers also confirmed this in both focus groups, highlighting that they enjoyed looking out and trying new products. We only had exceptions with consumers like Consumer FB-1 and Consumer FB-4 that had some skin issues requiring special effort and attention when selecting a product. In other words, the younger generation would have stronger purchasing intentions towards new products like Korean ones.

This needs qualifying, loyalty is not only about age. We also discovered the **notion of community** and Korea Mania involvement as a positive lever. As explained earlier, our interviewees in Focus group A have some affinity with the Korean culture. They confirmed that this affinity is most often linked to Korea's entertainment industry, and they are fans of K-pop. Professional 2 explained that she was gaining customers thanks to this sense of community: *"fans were really enthusiastic and kept on sharing with each other information."* As part of their interest in Hallyu, they like to follow Korean trends and imitate their idols; therefore, they would be loyal to buy the new trendy Korean products.

Hence, this means: Korean products are especially more attractive to younger generations, more open to discovering new products, and consumers who are fans of Korean culture.

4.2.2 Awareness and methodology before purchasing

There is a difference between buying a product directly because you need it, or trying to look out for some information to make sure it fits your needs, expectations and ethics. This is what we are interested in this part. We wondered how much research efforts French consumers would put before buying and trying a new product. This is important to better understand difficulties a Korean brand could meet when facing French consumers.

First, there is a lower form of awareness from consumers where they would easily give their **trust thanks to the distribution channel.** This is an idea supported by Professional 5, that underlined that buying a new product in a distributor like Sephora, a famous French multinational retailer of personal care and beauty products. As the distributor is trustworthy, the products and brand are trustworthy. The level of awareness is low because it only focuses on the distributor but not on the brands or products.

The second form of low degree of awareness is the one linked to the **recommendations of your relatives, professionals, or influencers**. This is an element that came back but not in the majority. It was the case for instance of Consumer FB-2: "*When I want to buy a new product, whether I know already which one I want, or, I will follow the recommendation of the seller*." However, interviewed consumers were not comfortable with this method as they would not trust the seller's advice objectivity. Trust is complicated to give away by French consumers, even to some famous Instagram or youtube personality, like underlined by Consumer FA-2: "*A lot of influencers will only recommend to you a product they do not know about because they get paid.*". Therefore, it seems very strategically tricky for a brand, like a Korean one, to gain trust this way. On the contrary, interviewed consumers mentioned the importance of relatives' advice as family circle or friends recommendations.

Third, a recent phenomenon appeared in France: **the rise of grading applications for skincare.** One of the most famous ones is Yuka, which can also grade food. Those applications aim to help consumers to better choose products for their health by grading each product and its composition. This changed the skincare industry for professionals and consumers. Professional 1 underlined that those applications made the consumers more aware of their purchase. All the professionals strictly confirmed the impact of the application. Professional 3 explained: *"Now we have to create and use different products based on Yuka grading, as consumers blindly follow the recommendations."* In the same idea, Professional 5 underlined: "*every time I am formulating a skincare product, I have to check if Yuka grades it well*." Some of our consumers confirmed it could be part of their process to check if they should buy a product like Consumer FB-2: *"packaging is the element that attracts me when buying a product, but I try to check the product on Yuka to make sure it is recommended."* Consumers using this application have quite a higher awareness of products, but not so high.

This needs qualifying because, in our discussion process, we noticed Yuka was a **controversial application.** All the professionals interviewed confirmed that the application grading and scientific basis could be discussed; therefore, the recommendations were not entirely correct. For instance, Professional 5 explained: "*no scientists are working for this application; this is more about marketing*". We noticed some consumers were aware of that and would therefore not trust those applications, like Consumer FB-4: *"I do not know who invested money in Yuka, I do not trust this application*".

All the discussions we had regarding the process before buying a product show that the French consumer is involved in its purchasing action. They look up for some qualitative products with their own methodology of research to help them. Contrary to Korea, the role of ambassadors and influencers is not a differentiating element to make the purchase intention higher.

4.2.3 Purpose for using skincare products

It was interesting to learn more about why French consumers wanted to use some skincare products to understand why Korean brands and products succeeded in the French market

A key element is **efficiency and price.** Professional 5 underlined: "*we formulate skincare products relative to the requirement of the consumers*." Every consumer expects some

results from the skincare product they use. It was the case of Consumer FA-3, who highlighted that: *"Price is my first criteria, then the origin and efficiency."* Consumer FB-3 had a similar statement. Another essential element that we heard was the aspect related to **routine**. Consumers enjoy taking care of their skin every morning, like Consumer FB-3 explained: "*I like applying a cream every morning and night, I like the perfume, the routine aspect*…."

4.2.4 Market trends

Knowing more about France's trends appears essential to better understand how the Korean skincare products made it. When asking professionals about it, the results were all matching.

One of the trends is the **minimalist** one. Every professional confirmed it, especially Professional 2 who said: "*at the beginning, brands tried to make it by focusing on the cute aspect of the product, but now they focus more on the minimalist aspect.*" Minimalism is at several levels. True, the packaging is appreciated when it is simple. It also appears for the product's composition. Professionals are highly advised to put less than 10 raw materials in a skincare product. Professional 5 highlighted during the interview: "*an actual trend is to realize skincare products with less than 10 raw materials*".

This minimalist aspect trend can be related to the **environmental trend** which is an important trend for French consumers. They prefer ecological products from brands with a strong Corporate Social Responsibility (CSR). That can be a reason why professionals are asked to put less raw materials in their products. It can also be linked with the importance of efficiency, mentioned earlier, for French consumers. They want less product and at the same time a high quality. The importance of respecting the environment was confirmed by Consumer FA-3, saying, for instance: *"I do not like to use a skin sheet mask, you only wear it once for 15 minutes, and then you throw it away, this is not respecting ethics.*"

During the interview, we learned that some Korean products and brands succeeded in respecting that minimalist aspect, which was the key to success. We will develop that point in parts 4.4.2 and 4.7. Also, we discovered that even if Korean products do not seem to take advantage of this ecological trend, they learned to focus on the efficiency aspect by focusing on one active ingredient. We will also develop those ideas later in part 4.7.

4.3 Culture of beauty

During our interviews, we analyzed that the cultural aspect was a topic of discussion around the application of skincare products and, more generally, around the culture of beauty. This part will transcribe interviews' perceptions about the differences in beauty culture between Korea and France. Then, the focus will be on the "cute" notion and the Korean routine.

4.3.1 Differences in needs and culture

When collecting secondary data, we wondered whether Korean hybrid culture might be close to the European and French one. That could be an explanation why Korean products were more attractive to French consumers. Therefore, during the interview, we tried to dig further into this matter.

When asking professionals if there were the same **beauty criteria** between France and Korea, we learned none. Professional 2 answered, "*Beauty criteria are very different; for instance, Korean women want white skin when it is not the case in France (...) Korean women want to look like occidentals, but the V-shaping is a notion that does not exist in Europe"*. It was also confirmed by Professional 2 that the social pressure of beauty was stronger in Korea than in France. "*South Korea is the first country to have beauty surgery; they have higher standards of beauty*." Therefore, the hybridity of their beauty culture is not why Korean products penetrate the French market with some ease.

We also investigated if the difference between the two countries would require an important product transformation to **adapt them to the French market**. Of course, the European norms are an external element to respect, which will be developed in part 4.6.3. It was confirmed that some factors were necessary to take into account. The **Asian skin** does not grow older the same way. Professional 1 explained: *"Asian skin grew older with aging spots, not wrinkles."* Also, weather is important to consider; the products need to be lighter as their **climate** is more humid. For hybrid products like the BB cream, an adaptation must be made on the **shades** to fit the European consumers. However, apart from that, there is no need to adapt the Korean product formulation to the French market. Still, even with those differences, the key is not about adapting the product but getting **inspiration** from it. For instance, Professional 1 underlined: *"the whitening Asian products were used differently in France."*

4.3.2 "Cute": a controversial trend

When completing the literature review and discussing with professionals, we could not help but notice the importance of "cute" in the Korean skincare industry. The brand Tony Moly is a perfect example of it, with a packaging that used to be unseen in France *(Appendix 3)*. One of the first brands to come on the French market was Tony Moly, and it was quite a shock for French consumers that were not used to those types of packaging or product. Professional 2 underlined: *"they started at first with some standard cute skincare products, but now they changed the focus."* It is an element of differentiation that could have been advantageous when Korean products started on the French market.

However, this element of differentiation can also be a hindrance. Cute products are not taken seriously by French consumers. When asking consumers about their perception of different skin sheet masks, they all agreed that the fun/cute aspect of Tony Moly's one was probably cheap and not very qualitative. Consumer FB-1 stated: "*I would grade Tony Moly mask last because it looks cheap*," or Consumer FB-2: "*it looks very playful, so it does not seem to be of good quality*." We will develop this idea in part 4.5.2 on the consumer side and 4.7.3 on the strategic side.

4.3.3. The importation of Asian routine

As explained previously in part 2.1, there is a strong culture of beauty in Korea. When discussing with professionals, we learned how this culture of beauty became an inspiration for French brands. In part 2.1, we explained that there was a famous 10-steps care routine. However, French women are not as dedicated as Korean women, and Professional 4 stressed: *"putting 10 products on your face is something very Asian, I do not think French women spend or want to spend that much time on it."*

However, French brands succeeded in importing a part of this routine in France. Professional 2 revealed, for instance, that popular products are: *"products inspired from the Korea routine like the double cleaning: the use of oil and cleansing balm."* Having longer routines makes the client use the product more often and develop needs for more different varieties of products. The importation of this routine gave rise to some new types of products. Professional 5 confirmed: *"The skincare product range became wider in the last years."*

Therefore, by inspiring themselves from the Asian routine, French brands made it easier for Korean brands to make it on the French market. As a result, French consumers did not have to learn something new from foreigners but were educated by French brands to use more product types and more often.

4.4 Historic of penetration

This section aims to report the interviewees' perception of the arrival of Korean skincare products in the French market. Interviewing both professionals and consumers provided us with insights regarding the Korean brand's perceived strategy and its effect on French consumers.

4.4.1 Several waves of penetration

Throughout the interviews with professional and consumers' focus groups, several elements were brought to explain the successful penetration of Korean companies on the cosmetic French market.

First, several interviewees agreed on the role of the distribution channel as a factor of development. Professional 2 presented challenges French consumers used to face to find Korean products. Indeed, Professional 2 presented us the struggle of French consumers who used to have to find Korean skincare products: "*My competitors were French websites selling on the French market and Asian websites which were selling from Asia to France. Asian e-store had a favorable price but big paying delivery delay while French websites had less choices and higher price"*. However, the actual distribution of numerous Korean products in famous French stores is a positive aspect of the penetration of the French market. This is also a key factor highlighted by interviewees: "*the fact that Korean brands are sold by famous stores in France improves the French consumer's trust toward them"* (Professional 2). The notoriety of brands through the distribution channel has also been mentioned by consumers like Consumers FB-1 and Consumer FB-4 who knew brands Tony Moly and Laneige because they noticed them in a Sephora store (*Appendix 3 & 4*).

Another element which was in every interviewees' mind is the original packaging design of some skincare products that made a clear difference. To describe this originality, most of the interviewees used words like "cute" or "fun". Indeed, every interviewee agreed on this specificity of packaging as a disruptive arrival on the French market. On the consumer side, Consumer FA-2 took the exemple of Tony Moly: *"it is cute, it is coloured, products have funny designs and when you arrive in a cosmetic store, these aspects will catch the attention".* Professional 5 also presents the importance of the cute aspect of the Tony Moly brand: *"Tony Moly offers a playful aspect and texture to their products. They are not afraid of a potential ridiculous effect, it catches the attention and you want to test it"*

Every interviewee mentioned the cute aspect as a differentiation point and a potential part of the strategy of Korean brands. Also, some of our interviewees noticed consumers' profiles buying Korean brands became more diverse. Professional 2 examined the example of the Korean group AmorePacific: *"AmorePacific is trying to target every type of consumer. I don't know their strategy, but they clearly have one specific target per brand"*. This example is confirmed by Consumer FA-3 *"Tony Moly and Holika Holika are really cute with funny packaging representing the Korean cosmetic industry whereas Laneige and Skinfood look more reliable like the French brand Clarins. They are for different types of consumers".*

Therefore, from our interview, we identified two waves of penetration in the French market. The first one began with some "cute" products that were essentially successful with Hallyu's fans. The second wave followed with some more diverse Korean brands harder to identify and targeting all types of French consumers.

4.4.2 The K-pop effect

As we highlighted during our literature, the development of Hallyu, mainly through K-pop, is an interesting factor. Therefore, we sought to evaluate how this had a potential impact on the Korean skincare development on the French market.

First, it is interesting to notice that every interviewee knew about a K-pop effect as they mentioned it through words like "Koreamania," "K-pop," or "Hallyu." Three professionals affirmed that K-pop was a favorable factor in Korean skincare development abroad, including in France. Professional 1 explained that *"K-pop brings a dynamic image of South Korea." At the same time,* Professional 2 added: *"The Korean soft power has never been as strong as it is today. If at that time, I was able to sell Korean cosmetics thanks to EXO merchandising with great success, you can imagine how successful it would be with the band BTS".* The importance of K-pop has also been noticeable during focus group A that was gathering interviewees interested in Korean culture or aware of Korea's soft power. Consumer FA-2 described her first sheet mask experience the following way: *"The first time I tried it, it was a sample given to me with a famous Korean idol on the packaging on it. I accepted this one because of the packaging".*

Still, even if interviewees were aware of the K-pop influence, most of them had no particular interest in its music or culture, except for Consumer FA-1, FA-2, and Professional 2 and 5, which were interested in Korean culture. Indeed, the other interviewees had an external vision of the K-pop effect and its impact in France. For

example, Consumer FB-2 and FB-3 shared the feeling that K-pop music was increasingly becoming more popular, but they had no particular knowledge of the matter. As explained in part 4.3, Korean fans are the initial consumers of Korean skincare products, but they are no longer the main and only target.

4.4.3 Specific integration case: BB cream recognition in France

The BB cream's case is relevant in our study as it is a hybrid product: both skincare and cosmetic one. The BB cream brought a change in the cosmetic industry.

This product inspired every French brand that started to formulate their BB cream. It was a product demanded by the consumers. Professional 4 highlighted: *"all the French brands had to formulate their own BB cream because the consumers asked for it."* At that moment, Korea was interesting for both professionals and consumers. Furthermore, it was a turning point for professionals who started to look more intensely for inspiration in Korea.

At the innovation level, the BB cream was also an important change. As previously explained, BB cream is a skincare lotion and with a Sun Protection Factor (SPF). Professional 1 underlined: *"in the cosmetic industry, brands are always trying to be innovative in terms of texture and trends, and it was an innovation."* It was primarily an innovation as it is two products in one. Hence in one action, you were doing two, which is very appreciative. Professional 4 confirmed that one reason the BB cream was famous was that *"it was two skincare steps in one."*

Regarding the consumers, it was also a significant change. On the one hand, all the fans of Korea knew it was an innovation from Korea and were happy to buy it on the French market. On the other hand, French consumers with no interest in the Hallyu were intrigued by this new product. This last category of consumers mentioned have two sub-categories. Consumers who are very curious about innovation in cosmetics are the first sub-category. Those ones were especially interested in BB Cream in this regard. The second sub-category is regarding consumers who do not appreciate spending too much time on self-care, as in one action, you were doing two, which is very appreciative.

The BB cream is a pioneer product and a symbol of what would happen next. As explained previously, in part 4.4.1, French brands started studying more intensively the innovation in Korea for inspiration and to realize them in France. This constant inspiration from Korean products by the French brands contributed to educating the French consumers. As a result, they became more prepared and open to Korean brands and products on the French market.

4.5 Korean nation image

This section aims to evaluate the way South Korea, as a nation, is perceived on the French market. As we highlighted during our literature review, the country-of-origin effect and Nation Branding impact are important factors to take into account. We will report here the vision of both professionals and consumers regarding South Korea's image.

4.5.1 The South Korea innovation image

When asking about South Korea's perception, every interviewee answered they saw this country as an **innovative and technological land**. Professionals even made the parallel with neighboring countries such as Japan or China: *"East Asia is an innovative region. China's strength is to copy and do a little more than copying while Japan and South Korea try to focus on the question: what is not done yet?"*. Interviewees' visions also relied on the fact that other industries such as the car industry or mobile phones like Samsung were powerful.

Focusing more on the South Korean cosmetic industry, every professional agreed that **innovation was the first advantage of this country.** Professional 5 describes this aspect: *"Asia has always been known to be the first in the innovation area, then there is the United States, and finally there is France which adopts a "Me too" strategy. As they already have a great brand image, they only pick up what is working and replicate it under their name."*

Furthermore, every interviewed professional agreed on the innovative Korean's strength, not only regarding the product development but also on what they develop around it. Indeed, professionals highlighted that they **imported from Korea a product, a routine, and a trend**. For example, Professional 1 explained the will of looking at Korean products and at *"new concepts, trends, and rituals about the beauty routine."* Professional 2 also presents the arrival of new products thanks to a part of Korean routine exportation: *"There are also products that arrived from the Korean routine as for the double cleaning face's process: oil and make-up balm."*

4.5.2 Perception of Korea under social aspect

When asked about Korean products, some interviewed consumers also discussed their vision of **Korean beauty**. For example, on both focus groups, consumers believe Korean have "perfect skin." It is the case of Consumer FB-4: *"Korean men use make-up, and it's not shocking. Korean men and women always look their best, and to me, the fact their products are qualitative is the reason their skin looks good.*".

Professional 5 shared her opinion about the BB cream's arrival in the French market: *"Before, because of foundation, the skin could not breathe, and it was a global fact. In parallel, we were wondering how Asian skin could be that perfect and smooth. Then, we discovered their routine and especially the BB cream potential".* Therefore, on the one hand, the perceived perfect skin of Korean is attracting aware French consumers towards Korean skincare. But, on the other hand, the professionals' view explained one of the reasons for this perceived perfect skin as explained by-products like BB cream.

4.5.3 "Made in Korea" effect: not scaring away anymore

A joint agreement emerged during all our interviews. Everyone underlined that the "Made in Korea" tag was **not negatively perceived anymore** on the French cosmetic market.

Interviewees and consumers stated that if it is not a unique advantage to mention "Made in Korea," and it is not a disadvantage either; it is neutral. Still, Professional 2 described a potential scenario where a non-Asian consumer would mistake the Chinese image and

products with Korean ones. This "Made in Korea" label interpretation **depends on the consumer's knowledge**. As it is highlighted by Professional 3: *"it can shift from a consumer to another. An aware consumer will know about the highly qualitative Korean products. On the other hand, you may have the other types of consumers less aware of it".* Another aspect underlined is that "Made in Korea" is **synonymous with exotism for most interviewed professionals.** This exotism includes the fact that brands also use specific raw materials to bring out some differentiation elements. Professional 5 stated: "*We developed a range of products around Asia. We used Centella Asiatica, commonly known as "tiger herb." This refers to the tiger balm, which is renowned among final consumers, and this exotism will attract them."*

Finally, interviewees relativized the "Made in Korea" effect, especially **in front of the "Made in France"** on the French market. This latter has a stronger impact, as mentioned by Consumer FA-2: *"The fact that I now know that the brand L'Occitane en Provence owns Erborian brings more reliability for me to this product.".*

4.6 Korean product perception

This section will present the professional's and consumers' perception of Korean skincare products. It is interesting to notice the gap between the professional's and consumers' vision; their perceptions are not similar. Also, we will report the perceived challenges in the future highlighted by interviewees for Korean products.

4.6.1 For professionals: an innovative advantage

It is interesting to notice that both professionals and consumers have a different perception of Korean skincare products. Therefore, we will focus now on the professional perception of Korean skincare and brands.

First, professionals all agreed to describe Korean products as innovative and disruptive. We discussed before the case of the BB cream, a product innovation. There are other innovations such as skin sheet masks, which appeared as a clear difference in front of what was usually made in the French market.

Other types of innovation were discussed, such as the ones about **compositions and textures.** For example, professional 5 mentioned the "*Centella Asiatica*" perceived in France as an exotic active. Professional 4 also developed the innovative texture aspect "*they are the ones who developed the transformation texture. So, when the consumer uses the product with her finger, the hole will recap itself, and the product will become perfect again."*

Professional 4 also presented the innovative aspect through **the product appearance or packaging** *"they recently developed a product which is a transparent bulb. There is a red drop in the middle that gathers the product's actives, and the consumer will have to shake it before using it, and after use, the drop will form itself again. It is gorgeous."*

Finally, all the professionals agreed on the Asian **innovative abilities,** especially the Korean one, inspired by their **beauty rituals**. Those rituals contribute to bringing new creation, which we already discussed in part 4.5.1.

4.6.2 For consumers: a packaging differentiation

Still, a point of differentiation appeared between consumers and professionals regarding their perception of Korean skincare products.

First, all consumers, fans or those aware of Korea's abilities underlined the innovative aspect. For instance, Consumer FA-1 and Consumer FA-2 both agreed on the **product and texture innovation** skill.

On the other hand, consumers without any specific knowledge about Korea have a different opinion. Indeed, they only notice Korean products when they are **atypical** and **mostly cute,** as discussed above. When we showed them Korean brands (such as Laneige) or Korean products that do not have a funny or cute design, consumers were mainly surprised about the Korean origin. They were not aware of the Country-of-origin of this product as Consumer FB-4 confirmed it: *" I knew Laneige, but I thought it was a Swiss product!"* or FB-2: *"I already saw Laneige in a Sephora store, but I never expected that it was a Korean brand" (Appendix 4)*. As Korean skincare products are associated with the idea of "cute," some mistakes can be made. This association is not the rule and can mislead consumers such as Consumer FA-3. She started the interview by describing Korean skincare as cute and for funny use. However, when asking her about her favorite product on a slide, she pointed out a Korean product from the brand Vitamasque because of its *"serious and natural aspect."*

This cute and funny perception brings out some other consumer's insights. These products were described at first as **cheap and affordable**. We showed them four skin sheet masks from four different brands: two famous French brands and two Korean brands, including Tony Moly. They had to guess the price of each. Every consumer ranked Tony Moly in the last position. They all described Tony Moly products as *"playful",* and some of them said they were *"low-quality products"* (Consumer FA-1, Consumer FB-1, Consumer FB-2, Consumer FB-3).

4.6.3 Challenges of Korean products

During our interview with French consumers, we also investigated elements that could be a barrier to the development of Korean skincare products.

First, professionals mentioned the **norms** as inevitable to take into account when creating a product. Indeed, that was explained by Professional 5: *"Sometimes Korean products sold in Korea inspire us, and when we look closer at their composition, it often happens that there are unauthorized components in France, in the formula. So, for us, that means we have to develop products inspired from Korea but with other constituents to have them accepted in the French market".*

Also, when two products are compared, one is "Made in Korea" and the other **"Made in France,"** the effect is disproportionate and positively stronger on the French side. Several interviewed professionals agreed on the following idea: *"French brands have such a strong position in this market that they can adopt a MeToo strategy, which consists of picking only the success story from other markets and creating them for their famous name"* (Professional 5).

Finally, as explained before, the association between **Korean products and cute** products is powerful in consumers' minds. Still, except for the consumers with some knowledge about Korea, consumers do not associate Korean products with the innovation aspect. *"I have the feeling that Korean cosmetics are mostly funny-orientated; I have the impression that we could buy it more as a gadget."*. (Consumer FA-3). This gap of vision is a challenge that professionals have to overcome.

4.7 Marketing strategies

Now we understand the French market and the Korean products better. So we are going to focus on some strategies that some Korean brands applied. We learned more about four types of strategy: choosing to focus on a Korean origin and hiding the Korean origin to look more European. Also, Brands can choose to focus on a pharmaceutical aspect of their product. As parapharmacy is the first place to sell skincare in France, it could attract more consumers. Finally, stressing the "cute" is unique and differentiating in France is also an approach.

4.7.1 Emphasizing the Korean image

Being a Korean brand or product is **exotic** on the French market. To put that forward means deciding to use this element of differentiation. We noticed two types of approaches. There is the marketing strategy that will choose to only focus on a Korean active in the product or the approach that will put forward the fact all the brand has a Korean identity.

When a brand chooses to **put forward the Korean origin** of the active, like the ginseng, they often focus on the storytelling and the medical aspect that can be very strong. Professional 1 highlighted: *"As Asia has a very exotic image, marketing can create a story around the medical activity and plants you are going to use in a product."* Also, for instance, Consumer FA-2, who mentioned a product focusing on Jeju products. This strategy to focus on the active is especially strong as it can also be linked with another trend. Indeed, French consumers look for efficient products with a small number of components.

The brand can also choose to put forward **Korea as part of her identity**, like Sulwhasoo or Erborian, claiming their Korean identity. Professional 2 underlined: *"Sulwhasoo really staged it at the distributor place to make you feel in Korea."*

In both scenarios, brands can use the exotic side of the origin as an element of differentiation, but it is not all; they can also rely on the Hallyu effect. As explained before, Korea's soft power grew stronger in many areas, like the entertainment, smartphone, or car industries. So, on the one hand, this means consumers are not afraid of Korean origin anymore and will not be shy to trust a product. On the other hand, brands can also attract the growing community in France of all Koreanmania.

4.7.2 Hiding the Korean image

Some Korean brands can choose to be more assimilated on the French market and "hide" their Korean origin. From an external point of view, it is easily perceived when looking at the packaging and marketing.

This perspective was confirmed when asking our second focus group. First, we asked interviewees if they knew about Korean cosmetics brands, and they answered they did not know any. Then, when we told them about some famous names distributed in France, they replied they did not realize and notice it was a Korean brand. For example, Consumer FB-2 explained: *"I knew Laneige, but I thought it was a Swiss product! I did not perceive it as Korean"*.

Professionals confirmed that hiding their Korean origin could be part of their strategy. For example, Professional 1 underlined: *"I don't think the average French consumer is aware they are buying Korean products."* Professional 2 shared this view: *"Laneige tries to hide their Korean origin*."

4.7.3 Other leverages: the pharmaceutical and the cute aspect

The **"medical" aspect** of skincare can attract customers. As explained in part 2.5.2, French consumers tend to prefer first parapharmacies to buy skincare products. Some Korean brands could have chosen to stress on this aspect to attract some customers. Indeed, one can see a real difference in the marketing of a product between a product like Laneige and Tony Moly (*Appendix 3*). In Focus group 1, Interviewee 2 explained: *"Tony Moly and other brands really focus on the cute aspect when other Korean brands choose to be minimalist."* Interviewee FA-1 added: *"Some brands like Laneige also have this medical aspect."* However, we noticed that if Korean brands try to obtain this "medical" image, highly aware consumers, paying particular attention to the skin products, cannot be misled only by packaging. As we explained in part 4.2, French consumers try to be aware and have some information about their buying product even if it is not all to the same degree. Consumer FB-1 highlighted: *"the distribution place is essential to me; I know that in parapharmacies, more tests are demanded on the products, so I will buy it there."* Therefore, giving a medical image to a product is not always enough.

The **"cute" aspect** is a significant element of differentiation in the French market. Consumer FA-2 underlined: "*Tony Moly products are cute, colorful, one cannot miss it in a store whereas a product like Laneige, they look like all the other products."* As already explained earlier, in part 4.3, the "cute" marketing was not the most successful in France, but it had some profits. Even if today, those products may be more appropriate for Millennials and younger ones, those "fun" products are still brought for some special event regularly. Consumer FA-3 underlined: *"I am not even sure skin sheet masks are working on me, and I don't use them regularly enough. I like to use it for movie night."*

5.0 Analysis

This chapter will answer our research question: ***Why are Korean skincare products becoming more popular among French Consumers?*** *To do so, we will analyze the results of our interviews and will connect those answers with our secondary data.*

5.1 How the Korean products success started

First, before understanding why skincare products became so popular, we need to **understand the first successful steps.** In our literature research, we discovered how Koreans were innovative and how the BB cream changed the cosmetic market. The interviews we held confirmed the theory. We heard many comments regarding the **Korean BB cream** from our interviews: the cream is an innovative and disruptive product: half skincare and half cosmetic. In 2008, another famous cosmetic product was introduced: the cushion cream that also became famous worldwide: *"a liquid foundation soaked in a sponge featuring a makeup base, sun protection, and skin moisturizer all in one product"* (Cosgrove, 2015). From our research (Vivat, 2015; Gélézeau, 2015, p. 6; Korean Cosmetic Agency, 2019; Misery, 2013, p. 1), we learnt those two products were a great source of inspiration for the French market. Our interviews confirmed that almost every French brand is now proposing a BB cream of their own to their clients. The interviews also gave us more detail about the arrival of the BB creams on the French market. For instance, we learnt that it is more or less at the same time that some retailers started to sell some Korean products and brands. This period was the beginning of the success of Korean skincare products and confirmed the literature review with the creation of a blue ocean with a differentiation strategy from Korean skincare companies (Whittington et al., 2020, p. 84). On the professional side, Asia was already studied, but Korea became essential to keep an eye on because of their innovation ability. On the consumer side, the arrival of this product was mainly spread to several types of consumers. Early fans of Korea could buy a product they knew was inspired by Korea. Consumers passionate about cosmetics could buy a new innovative product. The BB Cream, for the average woman consumer, is an opportunity for her to take care of her appearance without spending time on it (Gelezeau, 2015, p. 6; Vivat, 2015).

As we learned in our literature, review, at the same time, **the rise of the Hallyu,** the Korean Wave, kept on getting stronger and getting more fans. Indeed, as explained in our literature review, in part 2.2, South Korea's culture became a called-now "wave": the Korean Wave, called Hallyu in South Korea (Tjoe & Kim, 2016, p. 65). This wave takes several industries into account, such as the movie industry or the music industry. Thanks to it, the image of Korean products extends itself internationally (Tjoe & Kim, 2016, p. 66). This effect impacted from the music industry to fashion and food (Tjoe & Kim, 2016, p. 66). This is an element we can link as well with Keller's theory that explains associative network memory models to clarify brand knowledge. Indeed, thanks to the Hallyu, Korean awareness is stronger. Naturally, brand image is to link with some brand association and everyone is associating Korea with this cultural (and economical) success. Therefore, the Hallyu had a direct impact on consumer knowledge. The interview confirmed that French consumers who also are Korean Wave's fans were looking out to buy some Korean products they could watch from dramas or other Korean entertainment. They were reaching out for the products through Asian websites but had to face high delivery fees and long delivery times. French distributors noticed the opportunity and

started selling brands in 2016 like Tony Moly, as our Professional 2 underlined. As explained in our literature review with the CBBE theory, in part 2.3.2, those consumers had high brand loyalty, as we use the definition of Keller "*the differential effect that consumer knowledge about a brand has on the costumer's response to marketing activity" (1993, p. 1)*. On top of that, they are like a community bringing new fans to new consumers. They were a solid base that contributed to Korean products to benefit from a great start. Thanks to the literature review, we understood that Hallyu played a role in the cosmetic market and partly why: the familiarity of Korea. The interviews confirmed it and went deeper and the understanding: the changing mentality of the consumers and how retailers identified it and changed their strategy thanks to it.

The importance of cute appeared thanks to the interview, it is an element we did not identify in the literature review. As explained, Korean brands, like Tony Moly, can often have cute packaging. This attractive packaging is something mainly unseen on the French market. However, thanks to the literature review, one can analyze this phenomenon with the CBBE theory perspective. Brand awareness is about the buyer's ability to recognize a brand as Aaker explains it in his whole book (Aaker, 1991), and it became powerful for French consumers that were highly aware that "cute" means "Korean" brand in the cosmetic market. Their ability to identify Korean brands this way, in a sense, helps French consumers get used to seeing Korean brands and then buying those types of products. However, this cute aspect is not an asset in every situation and we will develop this ambivalence of the French consumers' feeling about the cute aspect in 5.6 part. Indeed, as we explained with the CBBE theory: to have a knowledgeable brand shall impact consumers and provide the firm a competitive advantage. Therefore, the fact that Korean products are "cute" could also become a profitable uniqueness.

5.2 Culture of beauty: difference between France and Korea

Through the literature review, we learned that Korean hybridization could be a vector of market penetration of Korean skincare products in France (Yun, 2015, cited in Estrade, 2015). Hybridization happened for contemporary culture and postcolonial culture like Korea (Ryoo, 2009, p. 143). Indeed, the global history of Korea led to the development of a hybrid culture through several aspects, like the Hallyu that succeeded in adapting the Western and Asian culture and got acknowledged (Ryoo, 2009, p. 145). When we tested if this hybridization was an advantage for Korean products during our interviews, we could not confirm this phenomenon as a positive advantage from our interviews. Ideas emerged primarily from cosmetic professionals' side that **cultures regarding beauty are different from the two countries.** Therefore, we tried to understand if Korean products should be strongly adapted to the French market and explain the success of those products.

Some elements were analyzed but did not contribute to link cultural aspects with the reason for the success of Korean products. First, professionals examined the cultural differences through **external** phenomena. They explained that the **difference in climate** impacts the way of taking care of consumers' skin. For instance, the high humidity of Asian countries means products need to be lighter, for example (Professional 3; Professional 4). This suggests an evolution of products from Korea to make them fit the European and French climate. Second, professionals also mentioned **skin** differences as an element of adaptation for skincare companies. Professionals explained a need for adaptation because skin aging usually leads to different effects. They mainly said that

Asian skin usually ages by the appearance of stains, while European skin usually ages by wrinkles. This general difference of skin types leads professionals to adapt their products and activities to answer different challenges for consumers' regions. Finally, based on literature about the Korean hybrid culture (Gélézeau, 2015, p. 5; Ryoo, 2009, p. 143), we wondered if France and Korea shared the same vision of beauty that contributed to the success of Korean brands. Thanks to the literature review, we were able to understand that Korean culture is not as far from the European ones as one could have thought and that they are westernized. With the interviews, we were hoping to understand better why Korean products would be attractive for a French consumer. We failed to have a clear understanding at this level, that could be the focus of a new study. Our interview results showed that **beauty expectations** are different between France and Korea. Highlighted by some professionals, French consumers usually want to tan their skin. In opposition to this vision, East-Asians are generally looking to whiten their skin and avoid sun tanning. This divergence of beauty perception involves a difference of products where whitening products will not be the top sellers in France.

We did find some common ground between Korea and France regarding the culture of beauty. The interviews confirmed that both France and Korea are **lands of cosmetics** and skincare, as we could read in the literature review. The interviews brought new elements to light and helped us to understand some essential differences between those two leaders in skincare. Indeed, every interviewed professional concluded that France and Korea are **important actors** in this industry. France is one of the major ones thanks to its famous brand and its image of luxury. Professionals see Korea as an innovative country and a trend creator (every interviewed professional). Through the **consumer aspect**, both French and Korean consumers are involved in using these types of products but at different levels. On the one hand, there are the very involved habits of the 10-step routine from Korea. On the other hand, French interviewees mentioned their pleasure in skincare products and a short routine. They also said different levels of involvement when looking out to buy a new product. Both Korean and French women want healthy products that will protect their skin. Transparent products, giving a beneficial aspect to your skin, are popular in France and Korea. All of this can partially explain some Korean brands' success.

5.3 Innovation and its impact on the French market

In the literature review, Bry explained in her article that France can have a competitive advantage thanks to its "know-how" of the industry and its innovation ability (2020, p. 38). Interviews confirmed this but brought more elements to light regarding the role of innovation. Indeed, we knew thanks to the literature review that the quick evolution of Korea contributed to making them also leaders in innovation and technology. Interviews from professionals of the industry highlighted and emphasized how much **innovation** is a really key aspect of the Korean market's skincare, not only on some few products we previously identified in the literature review like the BB cream. We understand now that an excellent reason for Korea's success in the French market lies down on its ability to **innovate**. Regarding the innovation ability of Koreans, it is interesting that this perception was coming from the professionals interviewed first and foremost. This innovative aspect has been mostly mentioned during the professional interviews, especially by Professional 5: *"Korea and Asia have always been at the innovation forefront."*. This perception of innovation is in direct link with our literature review: the

development of new products and new habits of consumption led the Korean cosmetic market to become the 9th biggest worldwide in 2019 (Korean Cosmetic Agency, 2019, p. 27). The consumers were able to perceive some differentiation about Korean products they would see as originals and different. However, they would not mention the innovative aspect as a clear strength of Korean cosmetic companies.

French brands noticed Korea's strength to innovate and started to keep an eye on it. The innovation is not just in the formula but also in the packaging, texture, and utilization as highlighted in our literature review with the example of the 10-step routine process (Hautala, 2020, p. 5). **French brands started to inspire** themselves from South Korean innovation, and their culture of beauty that we said in part 2.1, is powerful. By doing so, two phenomena explanations appeared during our interviews. First, the notion of a **beauty routine** started to rise in France even though it is lower than in Korea. This had a direct impact on the French cosmetic world that started producing more diverse types of skincare. Second, this inspiration from Korean beauty and culture started educating French consumers. When Korean brands came onto the French market, product acceptance was facilitated by consumers. Also, consumers would understand better how they were supposed to use products. Therefore, the ability to innovate in Korea has inspired many products to French brands and **educated the French consumers**, contributing to a stronger purchasing intention of Korean products. Therefore, this contributed to the success of Korean brands.

5.4 Korean brands strategies to fit the purchasing criteria of the French consumers

AmorePacific is one of the skincare leaders in Korea. AmorePacific and LG Household & Healthcare are respectively ranking 12th and 15th in the world ranking for cosmetic companies (Korean Cosmetic Agency, 2019, p. 39). Through our research and our discussion, we noticed how large these brands were. Thanks to the interview, we believe a lever that contributed to the Korean brand's success was to target all types of consumers. This idea was supported by Professionals 2. We named this global lever: ***catch them all***. If we picture this, it will mean having several brands which each target a specific consumer profile. This *catch them- all strategy* includes two sub strategies. The second lever is regarding distributor channels.

Regarding the lever one ***catch them all***, on the one hand, there is the strategy we called: ***the shadow strategy***. As we explained earlier, not all consumers are even aware they are buying Korean products, like underlined Consumer FB-3. Laneige, a brand which belongs to the AmorePacific group, is one example of national identity hiding. This is because the Korean brands chose to embrace the European aspect that prefers more minimalist products. The purchasing criteria of these consumers are mainly focused on their needs and an analysis on which product would fit their needs the best. Therefore, the consumer would buy the minimalist product without knowing much about its Korean origin. This *shadow strategy* highly contributed to the success of Korean brands on the French market that can reach broader types of consumers.

On the other hand, we called the second identified strategy: ***the light strategy.*** This one is the opposite of the other mentioned above and does not seek to hide Korean origins.

As highlighted in our literature review by Chryssochoidis et al. (2007, p. 1520), this strategy is in link with the country-of-origin effect as they explain by *"an obscure, intangible obstacle that a product (or service) confronts when entering a new market."*. There are several degrees. The brand can claim its **entire identity of Korean products**. As developed in the literature review, the Korean brand Sulwhasoo, a luxury brand, has ginseng and traditional medicine ingredients and packaging as qualitative as its products (Cosgrove, 2015). For instance, as underlined by Professional 2, they can put **stress on their Korean origin**. Sulwhasoo made a corner at the distributor place to make the consumer travel as they shop. There is also a lower degree, where the focus would be on **Korean actives used in a product**. Instead of showing their national identity, brands mention their potential exotic active ingredients cultivated in Korea. This is an element that comes to confirm our findings regarding brand strategies we had found in the literature review in part 2.3.1 regarding some brand strategies. On top of that, as French brands follow the trends to use specific active, this exotic differentiation tends to get softer and even disappear. It helps attract three types of consumers. First, the consumer fan of the Korean Wave will buy this because of the country's origin. This one need qualifying because of the fan's knowledge; they can also purchase from Korean brands using the shadow strategy because they know it is Korean. Second, there are the consumers who are passionate about Korean cosmetics and know about Korea's quality and innovation capabilities. Like Korean consumers' fans, they could buy from Korean brands in the shadows, as they have strong knowledge about their identity. Finally, there are the consumers that look out for exotism or fun.

The second lever used by Korean brands focuses on the **distributor channel** in France. In the CBBE theory, we mentioned the *perceived quality* about the perception of the quality of service or product (Aaker, 1991). We learned that choosing the appropriate distributor has a direct impact on the perceived quality of the consumers. In Lafayette shops, the Sulwhasso luxury brand is distributed. This brand benefits directly from the perceived quality of Lafayette and the trust consumers have in them. As underlined by Professional 2, when a consumer goes to Sephora, they trust this distributor and shall not be worried regarding the quality of the product. Therefore, a good selection of distributors was a key element by the Korean brand that contributed to their success.

To conclude this part, our findings related to the levers and strategies to attract more consumers fitted our theory regarding brand perception and awareness. One can have a better general understanding about the strategies cosmetics companies applied to adapt to the Hallyu but also understand the evolving needs of the consumers and taste we identified in both literature review and interview. It is also interesting to underline another element. The double face of those strategies: to be identified as an Asian brand or an European brand is similar to a feature we underlined about Korea in the literature review (in part 2.2.1): its mixed identity.

5.5 Younger generations as an opportunity for Korean skincare companies

In our literature review, we graded the skincare market as an intensely loyal market on the consumer side in France (Carrel, 2018, p. 24). This was confirmed in interviews by Professional 5 discussing the difficulty encountered by her company to innovate because of a strong product attachment by historical clients. She commented her company was

receiving negative feedback from consumers when they changed a range of products that were sold for 15 years.

Thanks to the interview, we also discovered new elements which we did not find in our literature review and which brought shades to this previous statement. Our consumers seemed to be **often changing products.** This is in opposition to our findings during our secondary data findings because Lu, by the presentation of AmorePacific penetration in the French market (2020, p. 39), presented the French cosmetic consumers as consumers who usually do not switch from products. Still, we discovered an element that can explain this contradiction with the professionals: the **generational factor.** Indeed, Professional 5 highlighted two types of consumers. There are the older generations who are more loyal and attached to a product and a brand. There is also the younger generation, which she called "Millennials," who are not loyal to only one brand and are used to switching and testing different products. This professional assessment agrees with our consumers' interviewees: they were all between 20 and 25 years old and claimed their will to change skincare products. **Younger generations are a great target opportunity** for Korean skincare companies, according to the interviewed professionals. Firstly, they do not have a solid attachment to a brand or a product as older generations seem to have. In that sense, Korean companies are not faced with loyalty as a strong barrier for these generations. Professionals present these generations as specific and disruptive generations. Professional 5 especially mentioned that these generations are still “unpredictable” and still have to continue their research about them. As far as we evaluate through our interviews, these consumers researched the product compositions. Thanks to applications, online research, and influencers’ recommendations, we discovered that these generations tend to get informed about what they will apply to their skin. This is an element that goes along with our literature review about social media, as part of a company’s strategy, one can identify influencers (Brown & Fiorella, 2013, p.78). For instance, k-pop is all over social media and it directly affects consumers and their product acceptance. Social media is an advertising platform where the Korean skincares industry benefits from the large numbers of viewers enjoying the rise of the Hallyu.

Finally, every interviewee confirmed that **Korea does not have a negative image anymore.** As it could have been possible several decades ago (Lu, 2020), professionals recognize Korea as a vital stakeholder in the cosmetic industry. From the consumers' side and especially younger generations, "Made in Korea" is not frightening. Interviewees explained the better image of Korea thanks to the other strong industries Korea has (primarily mobile phones with Samsung). However, they did not recognize "Made in Korea" as a positive advantage either as professionals had recommended. One reason for this is that several consumers only perceive Korean cosmetics as "gadgets" or "funny."

We believe that many elements are missing in some theories because Korea's evolution has been so great and so quick in the past years that there is still a lot to study regarding their cosmetic market and actors. In this case, we think especially that the perception of Korea by other countries keeps changing, as we underlined it with the rise of the Hallyu that is having many impacts. Our findings regarding the French consumers and the reasons why they are attracted by Korean products should be considered as a first step to understand this phenomenon and invite deeper studies to better understand all variables.

5.6 The ambivalence of the "cute" aspect in France

The "cute" aspect was not an element we particularly noticed during our literature review. However, in interviews it appears to be a real feature of some Korean products. Therefore, there are several insights we gain from this study regarding this matter, that could be interesting to further study in future thesis.

The **"cute" aspect helped the Korean brands to penetrate the French market**. This type of product did not exist on the French market, so it was a significant change. It is interesting to note that Korean brands were the first to sell their cute products on the French market. Therefore, for consumers, "cute" is mainly associated with Korean brands and vice versa. As explained in the CBBE theory, *brand associations* are about the automatic links created in the consumer mind (Del Rio, et al., 2001, p. 411). For Korea, it often means "cute". Those new types of products were interesting enough to attract consumers at least once. From our interviews, consumers shared they would usually buy a fun sheet mask for entertaining moments like Consumer FA-3 underlined: *"I am not sure sheet masks are really working on me, and I don't use them regularly. I like to use it for movie night."*. Some of those "cute" products like sheet masks inspired many French brands that noticed consumers asked for it. This interest by consumers supports our first thought: Korean skincare companies rely in part on a differentiation strategy as defined by Whittington et al. (2020, p 209). Indeed, the cute aspect of products is something quite new in the French cosmetic market and Korean companies enter in this share of the cosmetic market where competition is low.

However, these **"cute" products can also turn into a barrier for Korean brands**. When asking consumers about their perception of different sheet masks, they all agreed that the fun/cute Tony Moly was probably cheap and not very qualitative. Consumer FB-2 stated: *"it looks very playful, so it does not seem to be of good quality"*. As underlined with the CBBE framework, perceived quality is about the perception of the quality of service or product and not the real one (Aaker, 1991). This means French consumers **do not perceive " cute" products well.** We can try to understand this French resistance thanks to the **self-image congruence model** (part 2.5.2). Indeed, this model explains that consumers are choosing the attributes or qualities they want to develop, and not the product itself. This could imply that "cute" is not a quality that is valued by French consumers for skincare products. It is probably a woman feature socially better valued in Korea. This could be a matter of research in another thesis.

We understand better why brands **choose** a ***strategy of shadow*** **to overcome this difficulty** or try to be sold by a famous distributor. In the literature review part 2.5.1, with Carrel in IndexPress (2018, p. 14) We learned that the price has a different meaning for French consumers that lookout for a fair price, or at least one that is a real reflect of the added-value of the product. To put it simply, a price is explained by the value of the product. Thanks to our interviews, we realized the impacts of this theory. We realized **that another way to overcome some barriers,** like the cuteness of a product or the fact the brand is unknown by consumers, **is to sell products at a higher price** than average to give the perception of good quality to the consumers. We confirmed this theory during the interviews when noticing Tony Moly's sheet mask quality's perception was changing when the price was revealed, as Consumer FA-3 underlined it. Finally, as explained in part 5.5, the younger generation, less than 25 years old, are less loyal than the older ones.

On top of that, they look to try some new original products. Therefore, maybe the "cute" products can still be a strength for Korean brands.

5.7 Discussion

Thanks to this analysis, we can now answer our research question: why Korean skincare products became popular among French consumers? The discoveries we made contribute to providing us the opportunity to give layers and shades to our answer. The first layer of our response is related to factors that contributed to the successful initial penetration of the French market (1). The second layer is regarding positive factors explaining the popularity of Korean skincare products (2). The third layer is elements we thought could answer our research question that is not a barrier to Korean skincare products' popularity (3). The last layer concerns negative factors for Korean skincare products' popularity we identified during the research (4). Finally, based on our findings, we elaborated a framework (Figure 7.) that explains the popularity development of Korean skincare products in the French market.

The popularity of Korean skincare products has been allowed thanks to an initial penetration on the French market. Based on our findings and literature, two factors explained the first popularity of Korean skincare products.

First, the **Hallyu** has been an element of the initial popularity of Korean products. Based on our findings, the Hallyu through Korean fans allows a consumer based in France to have a strong will of Korean skincare products. Also, the **cute aspect** of some Korean products developed first in popularity. However, the cute aspect is still perceived and associated with the Korean image. Consumers perceive cute products as the result of a disruptive marketing strategy in front of traditional brands.

After this initial penetration, we spotted three positive factors that led to Korean skincare products' popularity on the French market.

The first factor is related to the fact that French companies notice the **innovation abilities** of the Korean cosmetics industry in terms of texture, formulation, utilization, and concept. French companies inspired themselves from those for their own products. This **inspiration process** brought new products and new beauty culture to the French market with an upgraded routine. Consequently, this inspiration process educates French consumers. As a result, French consumers better understand and perceive Korean products, and the **purchasing intention becomes higher**. Therefore, this first factor includes four parameters: innovation, culture, inspiration, and education, which worked as a positive factor for Korean brands' success.

Our second positive factor that improves the popularity of Korean skincare products on the French market is **the support of distribution channels**. Supported by our consumers' data collection, distribution channels are essential in building the reliability of a product in consumers' minds. By relying on usual French distribution channels such as parapharmacies, or cosmetic stores such as Sephora or Galeries Lafayette, Korean products already appear reliable and trustworthy.

Finally, our third unexpected finding, which is a positive factor of the overall development of Korean skincare products in the French market, is **the consumers' profile of younger French generations**. Supported by professionals' analysis and data collected from consumers, leads to present French younger generations as versatile and not attached to a specific skincare product brand. This opposition with older generations

makes a potential consumers' base for Korean skincare companies with lower barriers without the loyalty aspect.

We summarized why Korean products were successful on the French market in Figure 7., which you can find below.

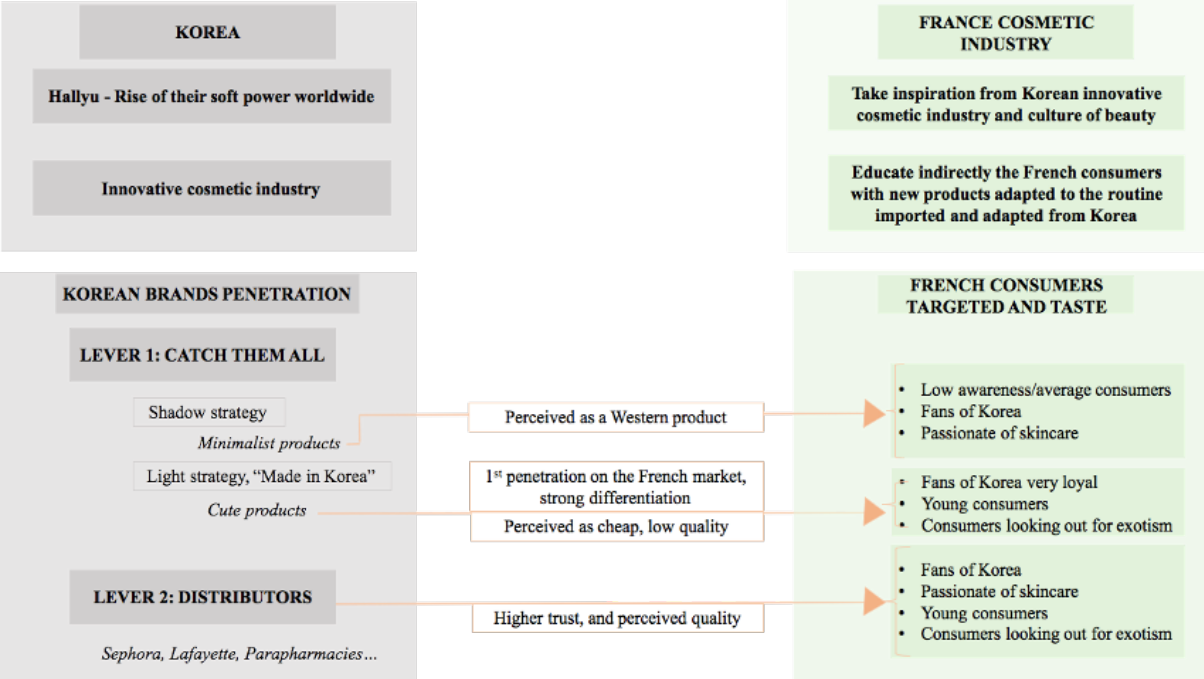

Figure 7. Framework of the penetration and success of Korean skincare products in the French market

During our literature review, we identified two factors that we expected to be positive. However, this was not the case, they are only neutral.

The first one was related to **Korean hybrid culture** that is not a positive factor in developing the popularity of Korean products. Based on professional insights, only an adaptation of skincare products in the formulation is required because of the general specificities of these two markets' skin reactions or climate differences. The second factor is related to the **Korean-origin effect. We discovered** there was neither a global positive nor a negative impact on the French consumers. Through our research, although "Made in Korea" is no longer a barrier in the French skincare market, it is not an advantage in front of competitors. This is also explained by the remaining dominant "Made in France" effect in this industry.

To conclude our discussion, we find out negative elements that appeared as a barrier to developing Korean skincare products in the French market.

As mentioned, the powerful "Made in France" effect is linked to an ethnocentrism preference of the French market. In opposition to younger generations, older ones have a solid attachment to products and most brands in the French skincare market. Reaching this profile of consumers is challenging for Korean companies that face an inherent barrier. Finally, our research and interviews bring the cute aspect as a negative factor in developing Korean skincare products. Although we agreed that this differentiation aspect facilitates the penetration of the French market, our consumers' data collection highlights that a cute aspect in a skincare product is mainly associated with a cheap and low-quality product in France. This connotation is a latent barrier for developing brands who bet on the cute appearance in France.

6.0 Conclusion

6.1 General conclusion

Thanks to our thesis, we gained much knowledge regarding the Korean cosmetics industry, the French one and aspects of consumer behavior. Several insights based on our research explain the development of Korean skincare products among French consumers.

The first element to mention is the success of Korean brands' penetration in the French market. This success was guaranteed because **Hallyu's fan base is very loyal and enthusiastic about sharing it.** Therefore, they secured a base level of sales. Also, the Korean penetration started with some "cute" products that were unseen on the French market until then. This packaging gave Korean brands a vital differentiation element that attracted curious customers, especially young ones who want to try those fun products.

Then, Korea's perception from professionals and consumers improved as a positive external element. As Korea became strong in many industries, including the cosmetic one, **French consumers changed their perception of Korea**. It switched from a negative perception to a neutral one. This switch contributed to facilitating sales as consumer perceived trust increased. The differentiation element could even become attractive enough for the customers. Also, on the professional side, Korea became an important country to keep an eye on for its innovative skills and beauty culture. By inspiring themselves from Korea, **French companies imported a new routine culture in France with new products that indirectly educated the French consumers**. Therefore, Korean products on the French market were less original and could be more easily sold.

Finally, Korean products were also successful because of their innovative aspects, differentiation, and brand strategy. First, Korea is highly innovative in its skincare industry and acknowledged by other countries. **Korean skincare products are innovative in texture, application, or even concept**, which is appealing for consumers and inspiring for professionals. Second, Korean brands' success understood the diversity of mindset of French consumers. They used two levers. The first lever is **extensive targeting thanks to various brand identities**: the lever "catch them all" that applies two strategies. First, there are the shadow strategies, hiding their Korean origins thanks to a minimalist packaging suggesting a Western brand. Second, there is the "light strategy," stressing the fact at various degrees the Korean origin of the products. These two strategies contribute to attracting multiple types of consumers looking out for different products. The **second lever is related to distributors**. French consumers know distributors, so they trust they sell products of good quality.

All the mentioned elements above contributed to the success of Korean brands in the French market.

6.2 Theoretical contribution

When doing the literature review, we noticed several gaps that our thesis could bring answers to.

Our first contribution is regarding **the comparison of beauty culture between Korea and France.** We were able to find many articles about Korean beauty and its hybrid culture. However, we noticed these analyses of beauty were not comparatively made with the French studies. We found some papers with comparative studies between Asian countries but not France, a global leader in the cosmetic industry. This means we did not see any direct application of how the whole Korean culture of beauty could directly influence their exportation success or failure in France. With our thesis, we tried to compare French and Korean culture of beauty to understand if any similarities could explain the success of Korean brands. Based on our research, we did not find any direct positive factors that explain the successful penetration. Still, thanks to this, we succeeded in identifying a framework (Figure 7.) describing why French consumers would be open to Korean products through French brands' inspiration of Korean skincare products and Korean culture.

Second element is regarding the **company's strategies**. As the Korean cosmetic industry is very developed, one could wonder about their strategy they chose to penetrate a market. There was little data about this. Thanks to our research, we now have a better theoretical vision of the **successful Korean brands' strategy.** At our level, it was complicated to have direct confirmation of Korean companies' strategy as we did not interview any employee belonging to one of them. Still our external insights from both professionals and consumers lead us to establish several strategies applied by Korean companies. As there are a lot of different consumer's profile in France; Korean brands try to attract a specific profile. To do so, they choose either to stress the Korean origin forward or not.

Third theoretical contribution is about **consumers**. We found general articles regarding the effect of Korean Wave on consumers. For instance, we found in a previous article the CBBE framework but only applied to Americans. Still, we did not succeed in finding articles that would link this to French cases. Thanks to our thesis, we now have a better understanding of French consumers, their needs, perception of products and process before purchasing a product.

6.3 Managerial implications

Our thesis has several managerial implications for both French and Korean companies.

Regarding French brands, **Korean routines** have been an exciting lever to change the habits of French consumers and develop a bigger range of products. Therefore, professionals could continue to implement it on the French market and stress it in their product marketing.

Also, French brands should negotiate some **partnerships with some Korean famous personalities or Korean skincare** that could be highly profitable. For instance, as BTS became the ambassador of Louis Vuitton, we believe there are enough potential consumers. There is a growing community of fans of the Korean entertainment industry in France. Therefore, having some partnerships with some famous Korean personalities or Korean skincare could be highly profitable for them. Indeed, fans are very loyal and dedicated customers, guaranteeing a minimum level of purchasing. Therefore, this means skincare companies could also do it. Of course, analyzing the market more in detail would be necessary to evaluate the size and value of this market.

Finally, professionals shall not try to implement the **"cute" appearance as a new packaging trend**. Consumers perceive them as cheap and low quality. They should continue inspiring themselves about types of innovation regarding texture, user experience. It appeals to consumers, especially the younger generation.

6.4 Societal implications

Through our research, we made some discoveries that have some societal implications. On the one hand, we learnt that French consumers were **not used to having an extensive routine.** It is a notion very established in Asia. Then, through the years, French brands imported the idea of routine and new products inspired by Korean products. This inspiration led to the development of French products based on Korean innovations that contributed to educating French consumers. Thanks to this, French consumers developed a new routine using new types of products. Therefore, Korean products offered are understood and better perceived by French consumers.

On the other hand, we also learnt that **"Cute" products are perceived very differently in France than in Korea**. What is "cute" in France is usually perceived as cheap or of low quality. French consumers tend to prefer minimalist products, especially when it comes to technological or medical aspect. "Cute" products helped Korean brands get recognized and even tried out of curiosity. However, they do not seem to be able to gain significantly in popularity and recognition. The young generation of consumers curious to try new products could be a target but is it hard to evaluate how valuable this could be.

Finally, we learnt **that consumer behavior impacts the popularity of Hallyu.** Fans of Hallyu are loyal and like to share good information. The French fans replicate at a lesser degree Asian fans' behavior toward this culture which is fascinating to them.

6.5 Limitation and future research

Although our thesis proposes answers to understand the arrival of skincare products on the French market, we know that this thesis is an additional step of understanding, but further research could develop this vast area. Our thesis aims to understand the perception of French consumers about Korean products. Still, our sample included only women. Although women consumers mostly make the skincare market, we know that a growing part of males also uses these types of products. For future research, we believe that **analyzing the male perception of these products can be interesting to confirm or alter our findings based on our data collection.**

Also, we noticed during our collection data the gap between our literature findings and our primary data collection, especially about the loyalty factor. Thanks to our collected data, we see that there is a rupture between generations about skincare consumption. Indeed, younger generations as Millennials are less loyal to a specific brand and have a will to change products. We believe that this generational factor should be studied in this area. As mentioned thanks to the data we collected from professionals, there are still aspects of these generations that are unknown for them to understand their consumers

better. In other words, **analyzing the population with generational filters may bring more insights into the consumers' perception.**

Our study aimed to open this specific field of research about the French market. Using qualitative research allows us to open a wide area of factors and gather several answers. We believe that developing a quantitative study after this thesis should allow the following researchers to develop their work. Indeed, after finding factors to explain the growing popularity of Korean products in France, **a quantitative analysis will be more specific with a more extensive poll of answers on its** (Hallyu aspect, consumer perception, ...).

Then, during the development of our interviews, we found out that interviewed consumers were often influenced in their purchasing decision during their research of data about a product. We noticed these new factors we did not anticipate in our literature review by mobile phone applications or online video made by influencers. Therefore, further research to **analyze the influencers influence should provide more insights into the French consumer purchasing intention.**

Finally, our thesis is based specifically on the Korean skincare products' arrival in France. Although Korea is now a reference in the cosmetic industry, other countries are also driving this industry, such as the United States, Japan, or, more recently, China. It would be interesting to **analyze their French market penetration to then confront these findings to ours**. This latter would provide more insights on strategies adopted by companies and will be interesting to understand the strategy choice adopted depending on the companies' country-of-origin.

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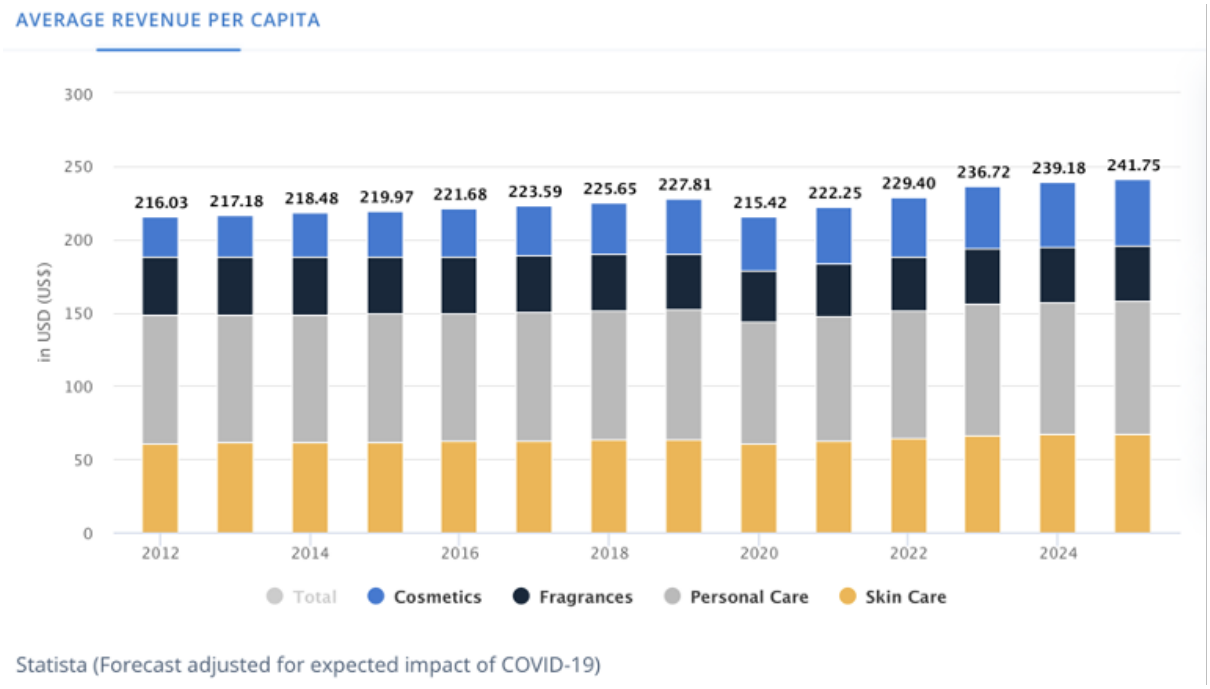
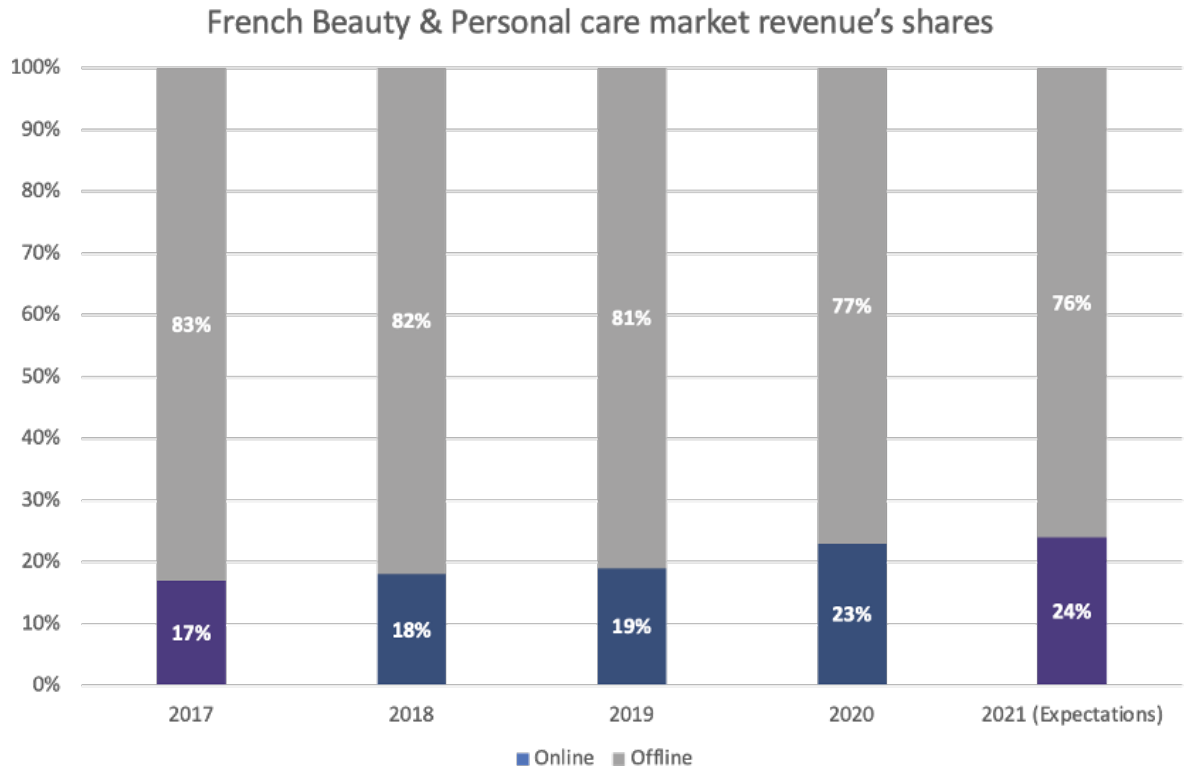
APPENDICES



Appendix 1. Beauty & Personal Care size market in France

Source: Statista https://www.statista.com/outlook/cmo/beauty-personal-care/france



Appendix 2. French beauty & Personal care market revenue's shares
Source: Statista https://www.statista.com/outlook/cmo/beauty-personal-care/france#sales-channels

Appendix 3. Tony Moly products
Source: https://www.stylevana.com/en_EU/brands/tonymoly.html

Appendix 4. Laneige products

Source: https://www.cultbeauty.co.uk/laneige/skin-care

Appendix 5. Interview with Focus Groups - Slide regarding face mask preference (skin sheet mask)

Appendix 6. Interview guide

Our interviews were conducted in French. We translated the questions in English.

Appendix 6.1. Interview-guide of Professional 1: A commercial selling raw material

N°	Questions
1	Can you introduce yourself and tell us about your professional experience please ?
2	How do you perceive Korean skincare products in the French Market?
3	Do you think Korean products are popular? Why?
4	Do you believe "Made in Korea" branding attracts or scares away customers?
5	Do you believe K-pop's popularity contributed in some way to selling more Korean skincare products?
6	What characteristics attract a French consumer to buy a Korean product?
7	Do you believe Korean products are easily adaptable to French consumers' needs?
8	Do you believe French beauty criteria and Korean beauty standards are similar?
9	In your opinion, why were BB cream and cushion cream so successful?
10	Do you work with Korean suppliers? Do you sell a large part of Korean raw materials in France?
11	In your opinion, why are Korean raw materials so attractive?
12	Is it a new phenomenon that Korean raw materials are popular?
13	Do you notice a consumer inclination toward "Made in France" products in the French market?
14	We have a question about you as a consumer. Do you usually or easily switch brands between skincare products?
15	What are the skincare trends in France?
16	Is it essential that products must look or be natural?
17	Do you have the feeling that Korean products are perceived as "natural"?
18	How do you imagine the future of Korean products?

Appendix 6.2. Interview-guide of Professional 3, 4 & 5: Professionals in cosmetic laboratory

N°	Questions
1	Can you introduce yourself and tell us about your professional experience please?
2	Did you create skincare products inspired by Korean products? In general, do you believe it is common practice to take inspiration from Korean products, for French professionals?
3	Do you have to adapt the product that inspired you to the French market, in any way?
4	Do you usually work with Korean actives? Is it a new trend?
5	Does your company frequently study Korean skincare trends?
6	Did you notice any evolution in terms of consumers' needs regarding skincare products?
7	In your opinion, why are BB cream and skin sheet masks popular in France?
8	Do you believe "Made in Korea" branding attracts or scares away customers?
9	Does your company apply a specific distribution strategy to sell products?
10	What are the trends in France about skincare?
11	Is it crucial that products are natural? Does it impact the development of your products?
12	Do you have the feeling that Korean products are perceived as "natural"?
13	How do you imagine the future of Korean products?

Appendix 6.3. Interview-guide of Professional 2: Entrepreneur who held a Korean cosmetic product e-commerce

N°	Questions
1	Why did you start your e-business?
2	Why did you end your business?
3	Which products were the most popular in your business?
4	Did you notice any pattern when consumers were purchasing products?
5	Do you think Korean products are popular? Why?
6	Do you believe "Made in Korea" branding attracts or scares away customers?
7	Do you believe K-pop's popularity contributed in some way to selling more Korean skincare products?
8	In your opinion, what are the Korean products' strengths in the French market?
9	Do you believe Korean products are easily adaptable to the French needs?
10	Do you believe French beauty criteria and Korean beauty standards are similar?
11	Do you have the feeling Korean brands strategically choose to hide or stress their Korean origins?
12	Do you believe French consumers trust Korean skincare products easily?
13	Do you think the Korean cosmetic industry is innovative?
14	In your opinion, why were BB cream and cushion cream so successful?
15	We have a question about you as a consumer. Do you usually or easily switch brands between skincare products?
16	What are the trends in France about skincare?
17	Do you have the feeling that Korean products are perceived as "natural"?
18	How do you imagine the future of Korean products?

Appendix 6.4. Interview-guide of Focus Group A: French consumers with affinity with Korean skincare products

When starting the focus group interview, we strongly encouraged the interviewees to feel free to react to what everyone would say.

N°	Questions
1	Could you please introduce yourself? Could you include some information about your skincare routine and connections with the Korean culture or cosmetic industry?
2	Do you know some Korean brands that are selling skincare products?
3	*(Slide with three foundations: a classic foundation packaging, a BB cream, and a cushion cream)* Which one attracts you the most? For example, do you know about BB cream and cushion cream?
4	*(Slide with three skin sheet masks: two Korean masks from the Vitamasque and Tony Moly brand, and one French mask from Sephora)* Among these masks, which one attracts you the most? Do you give any importance to the packaging? In the "natural" aspect?
5	*(Slide with two creams: L'Occitane and Erborian where it is written "Korean Skin Therapy")* At first sight, which product would you tend to prefer and why? *(Then, we mentioned that L'Occitane's group owns Erborian)* Is it changing your perception of these products or brands?
6	Do you usually easily switch from a brand to another for skincare products?
7	Where do you usually buy your skincare products? (distributor, online…)
8	Do you believe your affinity with Korea influenced your purchasing decision for skincare products?
9	*(Slide with the three previous skin sheet masks. We also added a skin sheet mask from Garnier. There are four different prices the interviewees have to associate with the products)* In your opinion, what would be the price of each mask and why? Now you know the price, does your product perception change for some of these products?
10	How much importance do you give to the product packaging?
11	Do you have the feeling you can be influenced by brand ambassadors or online influencers? What is your opinion about skincare influencers?
12	To conclude this interview, in your opinion, Korean skincare products became popular in France?

Appendix 6.5. Interview-guide of Focus Group B: French consumers without specific affinity with Korean skincare products

N°	Questions
1	Could you please introduce yourself ? Could you include some information about your skincare routine and connections with the Korean culture or cosmetic industry?
2	Do you know some Korean brands that are selling skincare products?
3	*(Slide with three foundations: a classic foundation packaging, a BB cream, and a cushion cream)* Which one attracts you the most? For example, do you know about BB cream and cushion cream?
4	*(Slide with three skin sheet masks: two Korean masks from the Vitamasque and Tony Moly brand, and one French mask from Sephora)* Among these masks, which one attracts you the most? Do you give any importance to the packaging? In the "natural" aspect?
5	*(Slide with two creams: L'Occitane and Erborian where it is written "Korean Skin Therapy")* At first sight, which product would you tend to prefer and why? *(Then, we mentioned that L'Occitane's group owns Erborian)* Is it changing your perception of these products or brands?
6	Do you usually easily switch from a brand to another for skincare products?
7	Where do you usually buy your skincare products? (distributor, online…)
8	*(Slide with the three previous skin sheet masks. We also added a skin sheet mask from Garnier. There are four different prices the interviewees have to associate with the products)* In your opinion, what would be the price of each mask and why? Now you know the price, does your product perception change for some of these products?
9	How much importance do you give to the product packaging?
10	When you intend to purchase a product, do you investigate its composition? Do you rely on consumer applications such as Yuka?
11	What do you do to inform yourself on a product?
12	Do you have the feeling you can be influenced by brand ambassadors or online influencers? What is your opinion about skincare influencers?
13	To conclude this interview, in your opinion, Korean skincare products became popular in France?