LOOKBOOK

The trends driving ‘dupe’ culture mainstream

Amid rising financial pressures, consumers are seeking affordable alternatives. That has given rise to “dupes,” products that are similar in design, appearance, or function to higher-end ones but at lower prices, many created under a store’s brand. Overall, store brand spending hit a record $236.6 billion in 2023, up 4.7% YoY, and is projected to surpass $250 billion in 2024, according to the Private Label Manufacturers Association (PLMA) and Circana. But not all dupes and private labels are viewed equally—as some retailers are giving these affordable options the premium treatment. In this EMARKETER Lookbook, we explore the data and insights shaping private label growth and guiding retail strategies.

Affordability is key for consumers struggling with inflation and high costs

Economic pressures are leading consumers to choose with their wallets, and that means established brands are getting cast aside. Cost considerations (60%) was the leading factor in brand switching, followed closely by a reduction in quality (57%), a June 2024 Emarsys survey found.

What to know

Economic pressure is changing buying behavior

More than half (52%) of US adults would stop buying an item or switch brands if faced with higher prices for the same-sized product or the same price for smaller packaging, according to CivicScience.

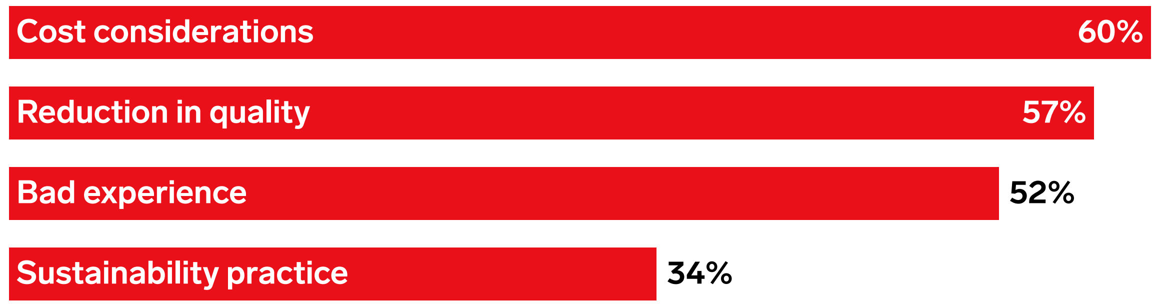
How retailers and brands can adapt

Discounts and promotions will keep consumers loyal. The majority of US adults are loyal to grocery and household goods (66%) and to specific beauty and personal care products (62%), a Morning Consult survey found. Name brands should consider developing lower-cost versions of popular luxury products to capture consumers looking for dupes within their budget. For example, e.l.f beauty is a common dupe for a Supergoop sunscreen, and it's sold for a fraction of the price. Retailers can also curate private label alternatives, like Trader Joe's Watermelon Overnight Face Mask, a dupe for Glow Recipe's high-end sleep mask.

Aside from stocking popular dupe brands in wholesale, retailers can curate private labels with a wide product offering—think Costco's Kirkland—to the same effect. While Aldi is the No. 1 private label in the US as of June 2024, with private labels representing 80% of its total units sold, Kroger's Smart Way is the fastest-growing private label, increasing its unit volume 135% YoY, per Numerator's Private Label Trends Tracker.

Factors That Have Caused Consumers Worldwide* to Switch Brands

% of respondents, June 2024



*Note: *Australia, Germany, United Arab Emirates, the UK and the US*
Source: Emarsys, "Customer Loyalty Index 2024: Global," Sep 24, 2024

287741 EMARKETER

What the experts say

Sky Canaves
PRINCIPAL ANALYST
EMARKETER

"Consumer research and customer data analysis are the foundations for development of private label brands and dupe products that can win over shoppers. Retailers should look for the white-space opportunities where their customers are trading down or cutting back, as well as stay abreast of broader trends in consumption across categories."

Katie Kelly-Landberg
SENIOR VICE PRESIDENT
BUSINESS & BRAND LEADERSHIP
BETTY, A QUAD AGENCY

"Retailers that deliver private label options should aim to capture consumers across all price points. For example, Target's tiered own-brand strategy (Market Pantry, Favorite Day, and Good & Gather) creates an experience that hits the needs and priorities of all Target shopper demographics while consistently laddering up to the umbrella brand."

Consumers are proudly embracing dupe culture

Not only are consumers buying dupes, but a community has emerged between these thrifty buyers. Social media posts often show the #dupe hashtags in posts praising the products. Dupes can feel like a budget hack or well-kept secret shared only within their communities online. In fact, 31% of adults have purchased a dupe according to WARC research. That percentage is much higher among Gen Z (49%) and millennials (44%).

Where we are now

The significance of Gen Z

Gen Zers will have $12.6 trillion in spending power by 2030, per Nielsen IQ estimates. But as Gen Zers come into their own, they're choosy about how they spend. Some 71% of Gen Zers say they sometimes or always buy a cheaper version of name-brand products, per a Business Insider and YouGov survey, as they look for ways to stay on trend without breaking the bank. Another 56% of Gen Z say they are extremely likely or likely to try store brands to find the "best value," a PMLA survey found.

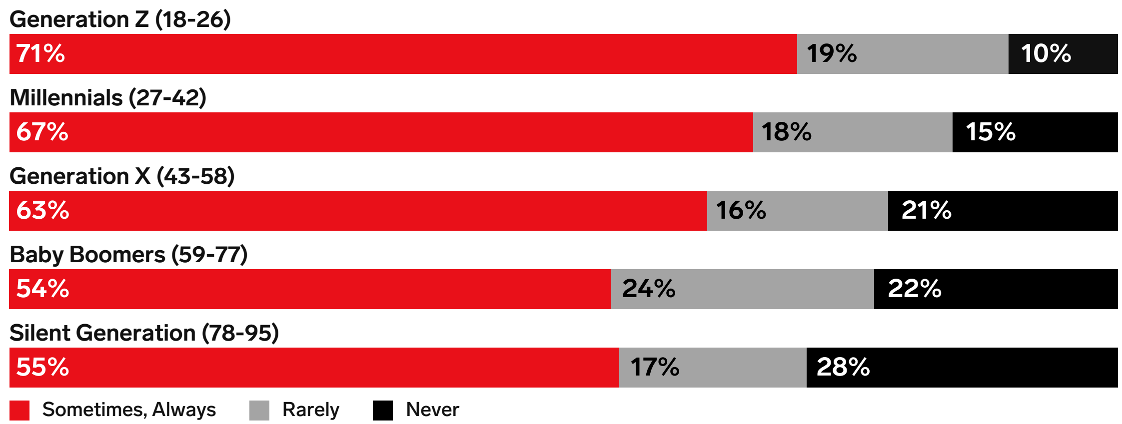
Discovering dupes

Over half (51.1%) of Gen Z shoppers have purchased a product discovered on social media within the past six months, a July 2024 EMARKETER survey found. TikTok and Instagram are the top social platforms for driving Gen Z awareness, with video and creator content driving awareness of new brands and products—including dupes. About one-third of makeup consumers ages 18 to 24 (33%) and 25 to 34 (35%) say they've bought a dupe due to social media content, per Mintel research.

The ability to de-influence

Dupe culture is intertwined with de-influencing, where creators share what not to buy. De-influencing content often shares budget-friendly dupes for expensive products. Companies known for dupes play off de-influencing in their advertising with "buy this, not that" messaging. Brandefy ads show side-by-side images of high-end skincare versus lower-tier dupes, while Quince's ads compare the price tag of premium brands' goods with its more affordable equivalent.

Frequency of Buying Dupe Products



Note: Gen Z helped popularize the word "dupe," but other generations may be more familiar with the word "knockoff," which has been used to describe counterfeit products. Today, the words are often used interchangeably to describe a generic, inexpensive version of an expensive, branded product.
Chart: Andy Kiersz/Business Insider Source: YouGov

What the experts say

Sky Canaves
PRINCIPAL ANALYST
EMARKETER

"Brands and retailers can look to the online communities that are already engaged with them as a starting point. Retailers should consider partnering with creators who showcase the latest finds and best deals from their stores, while brands should target category-specific influencers, who may have smaller followings but higher trust levels. Online communities and influencers can yield valuable feedback on product development to ensure new offerings align with core customer needs."

Katie Kelly-Landberg
SENIOR VICE PRESIDENT
BUSINESS & BRAND LEADERSHIP,
BETTY, A QUAD AGENCY

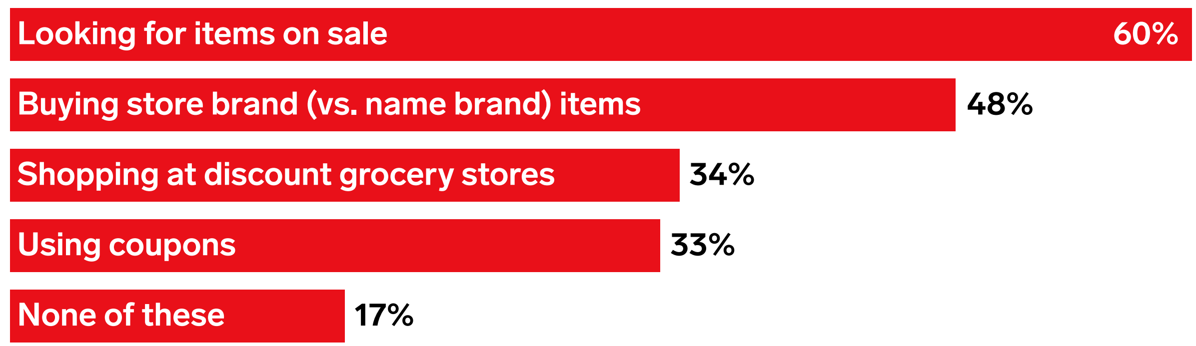
"Dupe culture taps into a shopper's sense of discovery and pride—there's a thrill in finding a quality alternative at a lower price. This playful, savvy approach to spending empowers consumers, especially as own brands evolve to offer products that give shoppers a small win without sacrificing quality."

Store brand alternatives are taking off in all categories

While grocery shopping, almost half (48%) of US adults have bought store brands—like Stop & Shop's Nature's Promise or Sprout's Farmers Market's own label—to save money, CivicScience found. Total store brand sales reached $121 billion in the first six months of 2024, with private label sales growing more than twice as fast as national brands—2.3% YoY versus 1.1%—per PLMA.

Cost-Saving Measures That US Adults Have Recently Taken While Grocery Shopping

% of respondents, April 2024



Note: ages 18+
Source: Civicscience as cited in blog post, Apr 9, 2024

285729 EMARKETER

What to know

Shopping on a budget

Budget-friendly private label sales accounted for 22 cents out of every dollar spent at grocery stores in 2023—the largest share ever, PMLA found. When buying a store brand grocery item, 80% of US adults believe the quality of private label food is just as good as, or better than, name brands, according to Ipsos.

Where consumers won't compromise

Store brands make up over a quarter (26.7%) of total household goods units sold in the last 12 months, according to Numerator, followed by grocery (23.8%), baby (22.7%), and pet (17.6%). Consumers are willing to buy generic paper goods (62%) and cleaning products (52%), a survey by Kroger's 84.51° found, but only 21% said they'd be willing to switch to cheaper babycare labels. That's likely because the "cost of failure" for items like diapers is too high, and consumers may associate name brands with trust and quality.

Private labels offer a strategic opportunity

Over half (53%) of retailers expect private label goods to be their top driver of growth in 2024, according to Nielsen IQ. And for the 64% of Gen Z respondents in the PLMA survey who frequently choose private labels, finding a store brand or a great dupe feels like a "win" and a smart, budget-friendly choice that sidesteps traditional brand marketing.

What the experts say

Sky Canaves
PRINCIPAL ANALYST
EMARKETER

"Retailers can foster greater affinity for their private label brands by incorporating them into their loyalty programs, such as by offering additional rewards for store brand purchases, including bonus redemption offers for their brands, and incorporating dupes into personalized product recommendations. Loyalty program data is also an important source of information that can be used to guide private label brand strategy."

Katie Kelly-Landberg
SENIOR VICE PRESIDENT
BUSINESS & BRAND LEADERSHIP
BETTY, A QUAD AGENCY

"Private label success doesn't come from jumping on the bandwagon or offering a cheap alternative. It comes from capturing the essence of the parent brand. The most successful brands, like Walgreens' over-the-counter (OTC) brand and Whole Foods' 365, reflect their retailer's mission, personality, and unique strengths. By aligning thoughtfully with the parent brand, these labels become trusted power players, redefining how consumers view and value store brands."

Presenting dupes as premium pays off

Over half (55%) of shoppers surveyed by FMI reported buying more private label items this year than in 2023. Retailers that have store brands with strong and appealing identities can make big impressions on customers. Strong branding instills trust, making the purchase feel like a smart choice that meets quality expectations at the right price.

What to know

Premium feel

Private labels are thriving by offering affordable alternatives that closely match the perceived quality of higher-end and name brands. Retailers like Target, Walgreens, and Walmart are following Trader Joe's lead in creating novel, high-value products to drive sales and foster loyalty. This novelty-driven approach resonates with younger consumers: 67% of those aged 18 to 34 and 73% of those aged 35 to 44 are excited to try new private label products, according to PDG Insights.

Effective branding

About 42% of Gen Zers report that store brand image or reputation is extremely important to their purchase decision, and 30% feel it's extremely important for a store brand to reflect their personal beliefs and values, PLMA found. Visual appeal also matters: 44% of Walmart shoppers are willing to try new products based on attractive packaging alone, CivicScience found. Walmart's new private label line, bettergoods, uses vibrant, modern packaging.

Agility in responding to trends and consumer needs

Store brands that roll out limited-time flavors or seasonal options—like Target's Good and Gather pumpkin pie spice—tap into consumer excitement around novelty and exclusivity, with 77% of shoppers viewing such launches favorably, per Advantage Solutions and Daymon. Another example: Private labels that tap into trends like clean skincare (natural, nontoxic, eco-friendly options) in beauty or Target's Hearth & Hand with Magnolia in home decor strongly appeal to consumers. Private labels that quickly introduce items that meet shifting preferences will stay competitive.

The Majority of US Adults Are Buying More Private Label Foods as They Look for Value and Quality

% of US adults who agreed with each statement about store-brand or private label foods, Aug 2024

Note: n=1,120
Source: Ipsos, "What the Future: Food," Oct 17, 2024

351640 EMARKETER

What the experts say

Sky Canaves
PRINCIPAL ANALYST
EMARKETER

"As the competition among private label brands rises, store brands have to become more like national brands in their own right to ensure their enduring appeal to consumers. Quality for price is a table stakes expectation nowadays, and regularly refreshed product assortments and appealing packaging are just as important for maintaining the kind of momentum around a brand that will keep shoppers coming back to discover what's new."

Katie Kelly-Landberg
SENIOR VICE PRESIDENT
BUSINESS & BRAND LEADERSHIP,
BETTY, A QUAD AGENCY

"Positioning dupes as premium all comes down to trust. Whether leveraging your retailer brand's credibility or mimicking national brand design cues (key for OTC brands to reassure consumers of safety), the goal is to instill confidence. Dupes thrive where trust exists, but remember: success hinges on understanding what your audience values most."

The Experts

Sky Canaves

Principal Analyst, EMARKETER

Sky covers retail and ecommerce with a focus on digital transformation in the fashion, beauty, and luxury industries. Prior to joining EMARKETER, she spent more than a decade as a business journalist, editor, and content director covering trends in the Chinese market.

Katie Kelly-Landberg

Senior Vice President, Business & Brand Leadership, Betty, a Quad Agency

Katie manages a team that delivers world-class creative and execution to clients from consumer packaged goods to owned-brand grocery. At Betty, she leads the brand strategy & design division Favorite Child and was in on the ground floor of Betty's international packaging design management and global photo studio programs. Her planning and strategic direction have consistently won major industry kudos.

Related resources

Watch industry thought leaders on webinars, and ask questions live
Check out our **upcoming and on-demand events**.

Stay informed with daily newsletters
Sign up for timely digital trends delivered straight to your inbox.

Hear us analyze news and trends on podcasts
Tune in to **Behind the Numbers: The Daily** and **Reimagining Retail**.

Get the bigger picture
Our research is trusted by industry leaders. Over 100,000 business decision-makers, including many of the Fortune 1000 and most major media companies and agencies, subscribe to EMARKETER research. Learn if your company **subscribes**.

We are here to help

If you are an EMARKETER research client and have questions, please contact **ii-help@emarketer.com**

If you are not a research subscriber, please send inquiries to **ii-sales@emarketer.com**

To learn about advertising and sponsorship opportunities, contact **advertising@emarketer.com**

EM STUDIO

EM Studio is EMARKETER's premier design and content studio delivering custom multimedia experiences. By marrying data-driven insights with superior design and production value, we help our clients tell actionable stories for business decision-makers engaging with our media channels.

EM Studio—where intelligence meets invention.

Learn More.