

Fragrance Market Innovation Opportunities in the US & UK

Case Study Report & Analytics Portfolio Piece by Olivia Spinelli

Executive Summary

This case study analyzes the fragrance market to pinpoint categories and notes with the strongest potential for innovation and market growth. Using trend data, consumer signals, and product supply, the analysis identifies where consumer curiosity is rising fastest, which notes are accelerating in momentum, and where market coverage remains underdeveloped.

The insights show:

- **Green** is the clearest whitespace category: strong consumer interest, fast growth, and underutilized in launches.
- **Peach, saffron, ginger, apple, and lavender** are high-interest but undersupplied, signaling clear innovation potential.
- **Vanilla, rose, and oud** dominate as core anchors but risk over-saturation if not refreshed with modern pairings.
- **Cross-market dynamics** reveal faster US adoption of bold, experimental notes, while the UK remains anchored in heritage-driven categories. Green emerges as the universal bridge across both markets.
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This work demonstrates advanced data analytics skills, including dataset integration, opportunity scoring, Tableau visualization, and strategic insight generation.

Data Analytics Methodology

Step 1: Data Preparation

- Imported multiple CSVs (categories and notes datasets) into Tableau.
- Cleaned and optimized datasets for performance.
- Created binary indicators (High Interest, Rising, Underused) for more flexible segmentation.
- Joined category and note-level datasets to allow cross-analysis.

Skills Highlighted: Data wrangling, dataset merging, creating calculated fields for binary splits, and data model structuring in Tableau.

Step 2: Feature Engineering

- Built a Weighted Demand Signal by combining baseline popularity (TMS) with trend growth (Δ Growth), assigning more weight to growth to prioritize rising signals.
- Normalized supply against Median Supply to highlight underuse relative to category norms.
- Designed a proprietary Opportunity Score:

Opportunity Score = Weighted Demand Signal / Norm Supply Count

Buzz Score TikTok Weighted = $0.7 \times \text{TikTok Score} + 0.3 \times \text{IG Score}$

Trend Momentum Score = $0.5 * [\text{Norm Growth \% Market}] + 0.3 * [\text{Norm Baseline Market}] + 0.2 * [\text{Norm Buzz Score}]$

Skills Highlighted: Feature engineering, normalization, calculated fields, ratio analysis, custom metric creation.

Step 3: Visualization & Analysis

- Built a series of dashboards in Tableau to analyze and present insights:
 - Heatmaps to visualize growth and opportunity scores.
 - Scatterplots (Share vs Growth) to classify categories into “safe bets” vs “emerging opportunities.”
 - Binary splits (Emerging vs Established notes, Underused vs Well-supplied).
 - Cross-market comparisons to highlight divergences in US vs UK adoption.

Skills Highlighted: Data visualization, dual-axis charts, custom tooltips, dashboard design, visual storytelling.

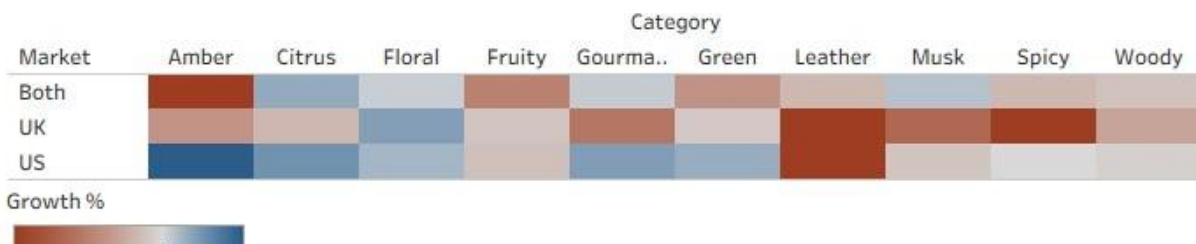
Step 4: Insight Synthesis

- Translated quantitative findings into clear business recommendations.
- Identified “dual-speed” innovation strategy: balance safe anchor categories with experimental opportunities.
- Connected note-level trends to category dynamics (e.g., green notes as a unifying play across both markets).

Skills Highlighted: Insight generation, synthesis of multi-layered datasets, market storytelling, strategic framing.

Category-Level Insights

(Supported by visualizations: Growth Heatmap, Opportunity Heatmap, Share vs Growth, Category Dominance US vs UK)



- **Green:** Biggest innovation space — high consumer demand and fast growth but limited supply.
 - **Amber & Gourmand:** Momentum is accelerating, especially in the US, while the UK lags in availability.
 - **Floral & Fruity:** Stable anchors that reinforce tradition, offering consistency but less disruptive growth.
 - **Cross-Market Divergence:** The US pushes forward with experimental categories (amber, gourmand, spicy), while the UK maintains stronger footing in heritage categories (floral, woody).
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Note-Level Insights

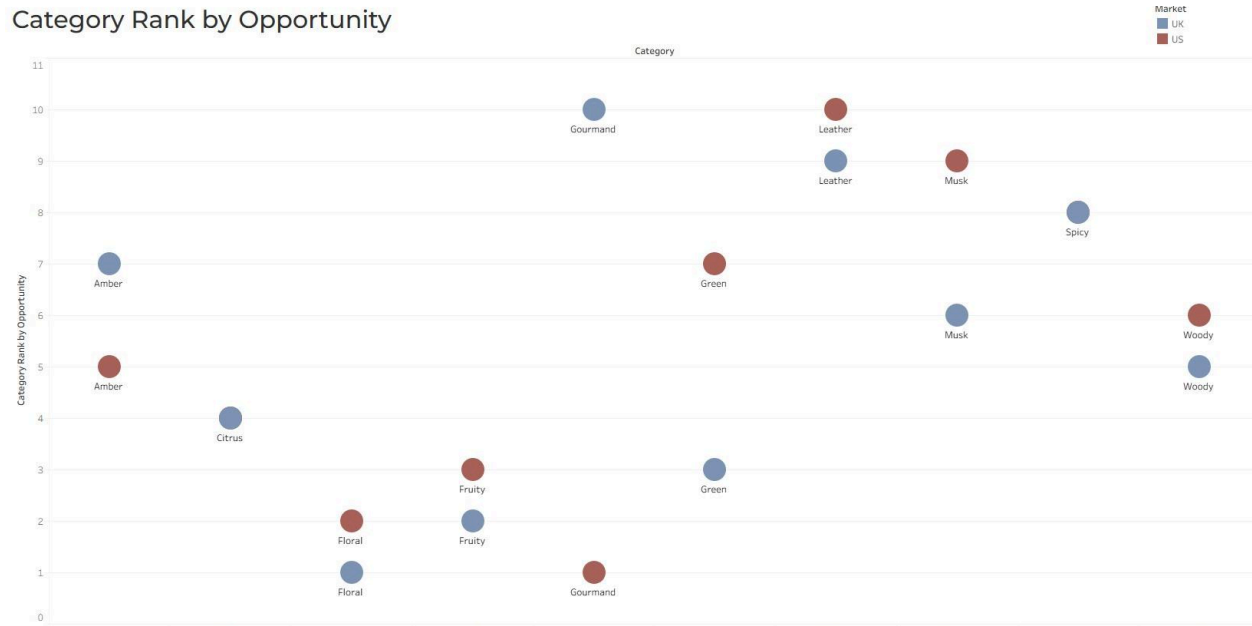
(Supported by visualizations: Emerging & Underused Notes, Emerging vs Established Notes, Core Power Notes, Fastest Growing Notes Heatmaps)



- **Emerging & Underused:** Peach, saffron, ginger, apple, and lavender are in high consumer demand but remain undersupplied.
 - **Core Power Notes:** Vanilla, rose, and oud dominate across both regions but risk consumer fatigue if not modernized.
 - **Rising Notes:** In the US, saffron and ginger show sharp growth momentum; in the UK, lavender and apple are regaining modern relevance.
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Cross-Market Insights

(Supported by visualizations: Category Opportunity Ranking, Deep Dive Example)



- **US:** Bold, experimental, and trend-led. Saffron, gourmand, and ginger are surging.
- **UK:** Traditional, heritage-anchored, with lavender, woody, and floral profiles dominating. Innovation moves slower but remains trusted.
- **Green as a Bridge:** Across both markets, green consistently shows high opportunity, making it the strongest unifier between US novelty and UK tradition.

Strategic Recommendations

1. **Dual-Market Anchors: Vanilla, Rose, Jasmine, Woody**
Reinforce the shared backbone across US and UK. Keep these as trusted category anchors, and **refresh via layering/blending** with rediscoveries to avoid saturation.

- Use modern twists (green/leathery facets, textural musks) rather than new “hero” claims.
 - Limit heavy line-extension churn; prioritize **quality over count**.
2. **US Innovation Push: Saffron, Peach, Oud, Ginger, Lavender**
The US rewards speed and novelty, leaning **bold and trend-driven**.
- Lead with **saffron & peach** as high-growth disruptors; position **oud & ginger** in luxe, contemporary blends.
 - Use **lavender** as the bridge note to keep experimentation accessible.
 - Execute via limited drops, collabs, and sensory storytelling.
3. **UK Heritage + Controlled Innovation: Rose, Vanilla, Musk, Pear, Apple**
UK consumers favor classic cues—innovate **carefully** through familiar frames.
- Layer **pear/apple** freshness into **rose/musk/vanilla** to modernize without losing trust.
 - Test with **limited editions** and seasonal capsules; scale only on proven pull.
4. **Rediscovery & Green Revival: Leather, Amber, Oakmoss, Moss**
Unlock whitespace in **underused green & leathery profiles** with a **“Rediscovery Platform.”**
- Pair oakmoss/moss with airy florals or citrus; refine leather/amber with clean musks.
 - Message as **premium heritage reimaged**; tie to sustainability and craftsmanship.
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Conclusion

This case study demonstrates how data analytics can guide innovation strategy by connecting consumer demand signals with market supply gaps.

From a technical perspective, the project showcases:

- Data integration & cleaning (joining note-level and category-level datasets)
- Custom metric creation (Weighted Demand Signal, Opportunity Score)
- Visualization & storytelling (heatmaps, scatterplots, binary splits)
- Strategic insight generation for decision-making