

KEY TAKEAWAYS

(see details next slides)

Overview based on
rankings and over-
representations
(see details & % next slides)



FEMININITY BOOST

KEY REASONS
TO USE PERFUME/
EAU DE TOILETTE

FRESHNESS
+ SEXY CONFIDENCE

MINDFUL SELFCARE
(Smell Fresh,
Feel Good)

ME-BOOST
(Energy & Uniqueness)
+ **SOCIAL ELEVATION**
(Social Status & Success)

PREFERRED TYPES
OF PERFUME/ EAU DE
TOILETTE BRANDS

CONSCIOUS COOL
(Trending + Clean)

CONSCIOUS CHIC
(Couture + Eco-
friendly + Safe)

ORGANIC
& CUSTOMIZED
EDGINESS

GEN Z
(15-25)



MILLENNIALS
(26-39)



GEN X
(40-54)



FRESHNESS & CONFIDENCE

SOCIAL IMPACT

FASHION POWER

ME-RITUAL
(Self-pampering +
Wellbeing)

GENDER-FREE
CHIC

ORGANIC ZEITGEIST
(Expression of
Trending Culture)

HIGH END SAFETY

Figures computed on Perfume Users (Apply Perfume / Eau de Toilette at least 3 times a week).

WOMEN 15-54 (EU5 top 80% income | USA top 50% | CN top 20% urban areas).

Sample (weighted): EU5 1,577 | USA 804 | CN 1,398

Definitions (GenZ, hypeselective, etc.) - Please see methodology section.

Green/red = significantly over/under US+EU5+CN average (statistical reliability at least 95%).

PERFUME / EAU DE TOILETTE USAGE

A MAJORITY OF SELECTIVE WOMEN APPLY PERFUME / EAU DE TOILETTE AT LEAST WEEKLY. DAILY USE IS A STAPLE IN EUROPE.

% How often do you use perfume / Eau de toilette?



Everyday or so 61,1

Everyday or so 59,2

Everyday or so 75,4

Everyday or so **47,9**

2 or 3 times a week 26,3

2 or 3 times a week 26,4

17,9

2 or 3 times a week **34,7**

NET At least 2 or 3 times a week 87,5

NET At least 2 or 3 times a week 85,6

NET At least 2 or 3 times a week 93,3

NET At least 2 or 3 times a week 82,7

Once a week 6,3

Once a week 7,5

3,4

Once a week **8,6**

Less often / Never 6,2

Less often / Never 6,9

3,3

Less often / Never **8,7**

Selective European Women are more likely to apply perfume / Eau de toilette everyday or so.

WOMEN 15-54 (EU5 top 80% income | USA top 50% | CN top 20% urban areas).

Sample (weighted): EU5 1,690 | USA 939 | CN 1,691

Definitions (GenZ, hypeselective, etc.) - Please see methodology section.

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PERFUME / EAU DE TOILETTE USAGE

PERFUME USE PEAKS AMONG MILLENNIAL SELECTIVE WOMEN

% How often do you use perfume / Eau de toilette?



		GEN Z (15-25)		MILLENNIALS (26-39)		GEN X (40-54)	
Everyday or so	61,1	Everyday or so	58,8	Everyday or so	60,7	Everyday or so	62,5
2 or 3 times a week	26,3	2 or 3 times a week	26,5	2 or 3 times a week	29,4	2 or 3 times a week	23,0
NET At least 2 or 3 times a week	87,5	NET At least 2 or 3 times a week	85,3	NET At least 2 or 3 times a week	90,1	NET At least 2 or 3 times a week	85,5
Once a week	6,3	Once a week	7,3	Once a week	5,5	Once a week	6,9
Less often / Never	6,2	Less often / Never	7,4	Less often / Never	4,4	Less often / Never	7,6

WOMEN 15-54 (EU5 top 80% income | USA top 50% | CN top 20% urban areas).

Sample (weighted): Gen Z 677 | Millennials 1,863 | Gen X 1,781

Definitions (GenZ, hypelselective, etc.) - Please see methodology section.

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TOP 10 REASONS TO USE PERFUME / EAU DE TOILETTE - OVERVIEW OF CULTURAL DIFFERENCES

Not in another zone's top 10

% Why do you wear the fragrance(s) you use most often?



#1 To feel fresh, clean and pure	37,5
#2 To feel confident	33,7
#3 To be more feminine	31,3
#4 To pamper myself	30,1
#5 To add a final touch, whenever I get dressed up	30,0
#6 To feel sexy/attractive to others	25,7
#7 To treat myself	25,5
#8 To feel good and have a sense of well-being	23,1
#9 To feel energized, vibrant/ To boost my mood	22,3
#10 To express my personality, my uniqueness	22,0

OVERREPRESENTATIONS

To feel powerful	15,1
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FEMININITY BOOST

FRESHNESS + SEXY CONFIDENCE



#1 To treat myself	40,7
#2 To feel good and have a sense of well-being	38,6
#3 To feel fresh, clean and pure	37,1
#4 To pamper myself	33,4
#5 To add a final touch, whenever I get dressed up	31,8
#6 To be more feminine	28,8
#7 To feel confident	27,1
#8 To express my personality, my uniqueness	23,8
#9 To feel sexy/attractive to others	19,9
#10 To feel energized, vibrant/ To boost my mood	16,1

MINDFUL SELF-CARE (SMELL FRESH, FEEL GOOD)



#1 To feel confident	25,9
#2 To feel energized, vibrant/ To boost my mood	25,3
#3 To add a final touch, whenever I get dressed up	23,1
#4 To express my personality, my uniqueness	22,5
#5 To feel fresh, clean and pure	22,2
#6 To feel good and have a sense of well-being	20,8
#7 To be more feminine	19,5
#8 To express refinement, subtlety	18,9
#9 To be fashionable and trendy	18,8
#10 To feel sexy/attractive to others	18,5

OVERREPRESENTATIONS

To have a good professional image	18,3
To relieve stress	15,8
To feel super successful	14,3
To please someone who likes it	14,1
To be non-conventional, to shock people	13,0
To feel appropriate	12,8
To feel ready to do things I have never done before	11,6
To feel like a different person	11,5
To get the sensation I am travelling/ escaping to new worlds	10,8

ME-BOOST (ENERGY & UNIQUENESS)

+ SOCIAL ELEVATION (SOCIAL STATUS & SUCCESS)

Figures computed on Perfume Users (Apply Perfume / Eau de Toilette at least 3 times a week).

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TOP 10 REASONS TO USE PERFUME / EAU DE TOILETTE - OVERVIEW OF GENERATIONAL DIFFERENCES

Not in another generation's top 10

% Why do you wear the fragrance(s) you use most often?

GEN Z (15-25)

#1 To feel fresh, clean and pure	31,9
#2 To add a final touch, whenever I get dressed up	29,2
#3 To feel confident	28,7
#4 To feel good and have a sense of well-being	26,8
#5 To pamper myself	24,8
#6 To be more feminine	23,5
#7 To treat myself	23,2
#8 To express my personality, my uniqueness	23,2
#9 To feel sexy/attractive to others	23,2
#10 To make an impression	18,9

MILLENNIALS (26-39)

#1 To feel fresh, clean and pure	31,7
#2 To feel confident	28,8
#3 To add a final touch, whenever I get dressed up	27,9
#4 To be more feminine	26,3
#5 To feel good and have a sense of well-being	24,8
#6 To treat myself	24,0
#7 To pamper myself	24,0
#8 To feel energized, vibrant/ To boost my mood	21,2
#9 To feel sexy/attractive to others	21,2
#10 To express my personality, my uniqueness	20,8

OVERREPRESENTATIONS

To be fashionable and trendy	13,6
To relieve stress	12,6

FRESHNESS & CONFIDENCE

SOCIAL IMPACT

FASHION POWER

ME-RITUAL (SELF-PAMPERING + WELLBEING)

Figures computed on Perfume Users (Apply Perfume / Eau de Toilette at least 3 times a week).

WOMEN 15-54 (EU5 top 80% income | USA top 50% | CN top 20% urban areas).

Sample (weighted): Gen Z 578 | Millennials 1,679 | Gen X 1,523

Definitions (GenZ, hypeselective, etc.) - Please see methodology section.

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TOP 10 PREFERRED TYPES OF PERFUME BRANDS

- OVERVIEW OF CULTURAL DIFFERENCES

% When I choose a perfume brand, I prefer --

Not in another zone's top 10



#1 Haute couture (e.g., Chanel, Dior, YSL, etc.)	37,3
#2 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess)	34,3
#3 "Clean Beauty" brands	33,0
#4 Fun brands	32,3
#5 Brands which guarantee the perfect safety of their products	27,6
#6 Affordable brands that allow me to buy high-class fragrances (e.g., Ulric de Varens, Vanderbilt, etc.)	26,8
#7 100% natural brands/ Certified organic brands	24,7
#8 Brands capable of making a custom fragrance formulated especially for me	21,4
#9 Vegan, cruelty-free brands	21,2
#10 Brands with a strong sustainability commitment	20,8
OVERREPRESENTATION	
Brands created by my favourite celebrities/influencers	15,2

CONSCIOUS COOL
(TRENDING + CLEAN)



#1 Haute couture (e.g., Chanel, Dior, YSL, etc.)	47,5
#2 Brands which guarantee the perfect safety of their products	39,3
#3 Brands with a strong sustainability commitment	26,8
#4 Brands which offer refillable packs/bottles	26,3
#5 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)	25,8
#6 Affordable brands that allow me to buy high-class fragrances (e.g., Ulric de Varens, Vanderbilt, etc.)	24,1
#7 Vegan, cruelty-free brands	23,0
Brands which make "genderless" fragrances that can be worn by both men and women (e.g., Calvin Klein, Jo Malone, Byredo, etc.)	22,8
#9 100% natural brands/ Certified organic brands	22,5
#10 Brands capable of making a custom fragrance formulated especially for me	21,9

CONSCIOUS CHIC
(COUTURE + ECO-FRIENDLY + SAFE)



#1 100% natural brands/ Certified organic brands	36,9
#2 Brands which guarantee the perfect safety of their products	35,5
#3 Haute couture (e.g., Chanel, Dior, YSL, etc.)	31,5
Brands which make "genderless" fragrances that can be worn by both men and women (e.g., Calvin Klein, Jo Malone, Byredo, etc.)	28,0
#5 Brands capable of making a custom fragrance formulated especially for me	27,0
#6 Brands with a strong sustainability commitment	26,7
#7 Brands doing only perfumes (e.g., Acqua di Parma, Frederic Malle, etc.)	24,0
#8 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)	23,5
#9 Brands which support mental health initiatives	22,4
#10 Brands which offer refillable packs/bottles	22,0
OVERREPRESENTATIONS	
Independent brands (Indie brand)	21,3
Avant-garde, disruptive, edgy brands	20,6
Brands whose ads campaigns show my favourite celebrities/influencers	20,6
Brands that best express my country's culture and way of life	19,9
Brands created by my favourite celebrities/influencers	16,8

ORGANIC & CUSTOMIZED EDGINESS

Figures computed on Perfume Users (Apply Perfume / Eau de Toilette at least 3 times a week).

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TOP 10 PREFERRED TYPES OF PERFUME BRANDS

- OVERVIEW OF GENERATIONAL DIFFERENCES

% When I choose a perfume brand, I prefer --

Not in another generation's top 10

GEN Z (15-25)

#1 Haute couture (e.g., Chanel, Dior, YSL, etc.)	38,7
#2 Brands which guarantee the perfect safety of their products	31,9
Brands which make "genderless" fragrances that can be worn by both men and women (e.g., Calvin Klein, Jo Malone, Byredo, etc.)	28,2
#4 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)	27,7
#5 100% natural brands/ Certified organic brands	26,2
#6 Brands capable of making a custom fragrance formulated especially for me	24,7
#7 Brands which offer refillable packs/bottles	24,3
#8 Brands with a strong sustainability commitment	24,2
#9 Affordable brands that allow me to buy high-class fragrances (e.g., Ulric de Varens, Vanderbilt, etc.)	22,9
#10 Vegan, cruelty-free brands	20,8

GENDER-FREE CHIC

MILLENNIALS (26-39)

#1 Haute couture (e.g., Chanel, Dior, YSL, etc.)	36,7
#2 Brands which guarantee the perfect safety of their products	33,6
#3 100% natural brands/ Certified organic brands	32,1
#4 Brands with a strong sustainability commitment	26,7
#5 Brands capable of making a custom fragrance formulated especially for me	25,4
#6 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)	25,0
Brands which make "genderless" fragrances that can be worn by both men and women (e.g., Calvin Klein, Jo Malone, Byredo, etc.)	22,9
#8 Brands which offer refillable packs/bottles	22,6
#9 Affordable brands that allow me to buy high-class fragrances (e.g., Ulric de Varens, Vanderbilt, etc.)	22,4
#10 Brands doing only perfumes (e.g., Acqua di Parma, Frederic Malle, etc.)	21,1

OVERREPRESENTATIONS

Brands that best express my country's culture and way of life	18,2
Brands created by my favourite celebrities/influencers	14,8

ORGANIC ZEITGEIST (EXPRESSION OF TRENDING CULTURE)

GEN X (40-54)

#1 Haute couture (e.g., Chanel, Dior, YSL, etc.)	42,7
#2 Brands which guarantee the perfect safety of their products	38,7
#3 Fashion apparel brands (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)	28,3
#4 100% natural brands/ Certified organic brands	24,9
#5 Brands with a strong sustainability commitment	24,7
Brands which make "genderless" fragrances that can be worn by both men and women (e.g., Calvin Klein, Jo Malone, Byredo, etc.)	24,0
#7 Affordable brands that allow me to buy high-class fragrances (e.g., Ulric de Varens, Vanderbilt, etc.)	23,3
#8 Fun brands	22,1
#9 Brands doing only perfumes (e.g., Acqua di Parma, Frederic Malle, etc.)	21,7
#10 Brands capable of making a custom fragrance formulated especially for me	21,4

HIGH-END SAFETY

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AGENDA

EXECUTIVE SUMMARY

01 SAMPLE
& TARGET DEFINITIONS

02 PERFUME USE TODAY

03 PERFUME KEY NEEDS
OVERVIEW



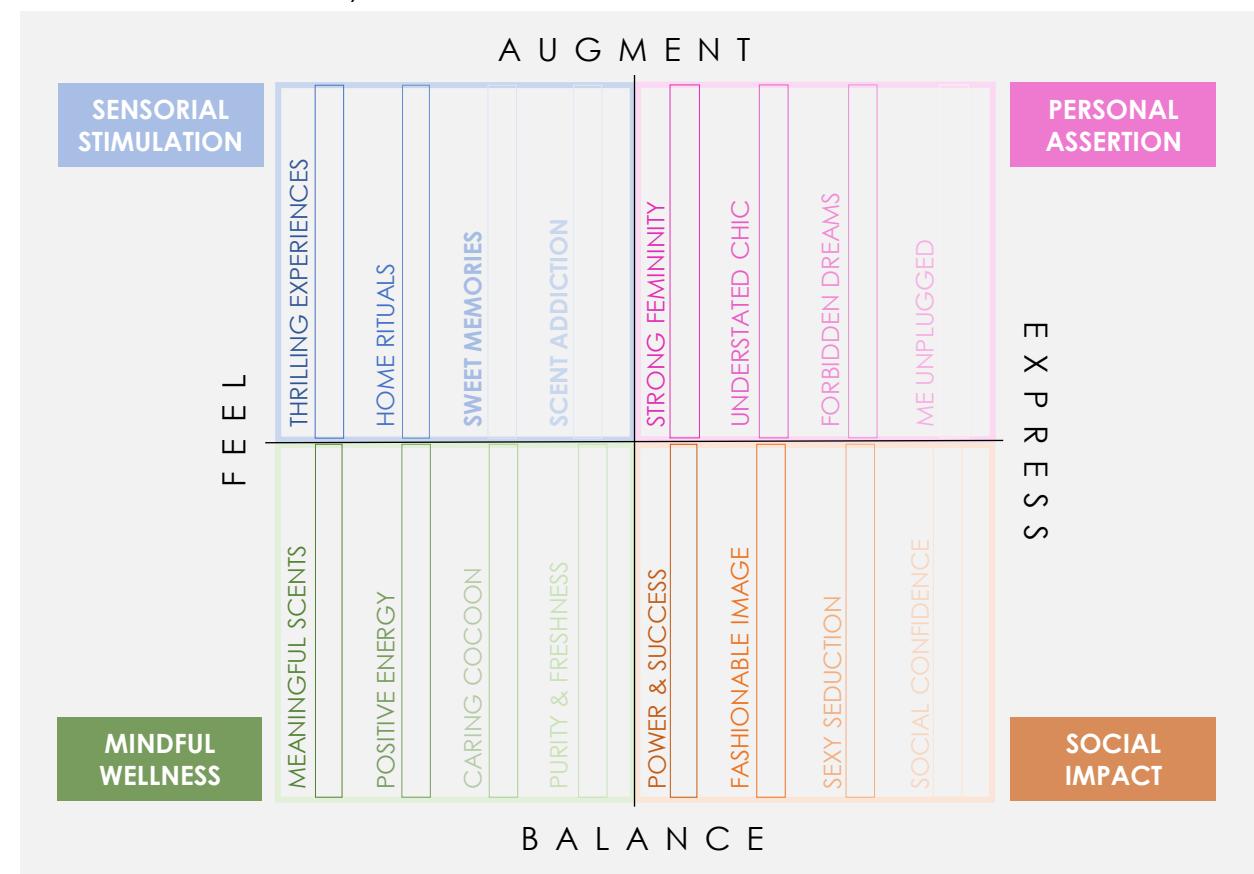


PERFUME KEY NEEDS METHODOLOGY (1 / 2)

A model summarizing Perfume Key Needs & Benefits in Europe, US and China.

The Perfume Key Needs model is designed to cover 4 broad areas, encompassing the whole spectrum of the Selective Perfume consumers culture.

- **Sensorial Stimulation:** Perfume as a physical addictive and pleasurable experience that hacks the senses and triggers memories.
- **Mindful Wellness:** Perfume as an emotional positive experience that makes people reconnect to the world and to themselves.
- **Social Impact:** Perfume as a passport and enabler that helps people belong, socialize, and influence others.
- **Personal Assertion:** Perfume as a cultural booster that unlocks private fantasies, stimulates personal growth and enriches one's identity.





PERFUME KEY NEEDS METHODOLOGY (2 / 2)

Each Perfume culture area is made of 4 specific dimension that define 4 branches. Within each area (e.g. Social) the dimensions are ranked from the most basic to the most advanced. Each dimension branch is quantitatively defined by around 10 statements/choices, originating essentially from Perfume related questions:

Attitudes towards perfume:

Benefits expected from wearing Perfume (vs. from other categories);

Reasons to use the Perfume brands used most often;

Types of perfume preferred brands;

Use of scented products for personal care and home;

Additional questions used for some dimensions: **Personality traits one has/wants to develop,** **Fantasy characters shaping one's dreams.**

- All statements/choices within each dimension have been checked for correlation consistency within EU5, US and China samples.
- Confirmatory factor analysis has validated that all important statistical dimensions computed from the raw data are correctly represented by the set of the 16 branches
- All branches are conceptually as distinct as possible within each area. It may happen that significantly statistically correlated with branches belonging to other areas because women may combine Sensorial, Personal, Social and Wellness needs.

PERFUME SCALING

- For each dimension, respondents are given a score which corresponds to the number of choices they have picked, plus the number of statements they strongly agree with among the questions defining the dimension.
- This score is standardized (mean 0/standard deviation 1) by country within Selective Perfume users who apply perfume at least 2/3 times a week. Standardization by country has been used because it better explains Perfumes brand usage than unstandardized scales, which are sensitive to cultural norms bias.
- The profiles can be easily compared across countries and can be safely used when pooling countries together (since the branches are standardized at the country level).