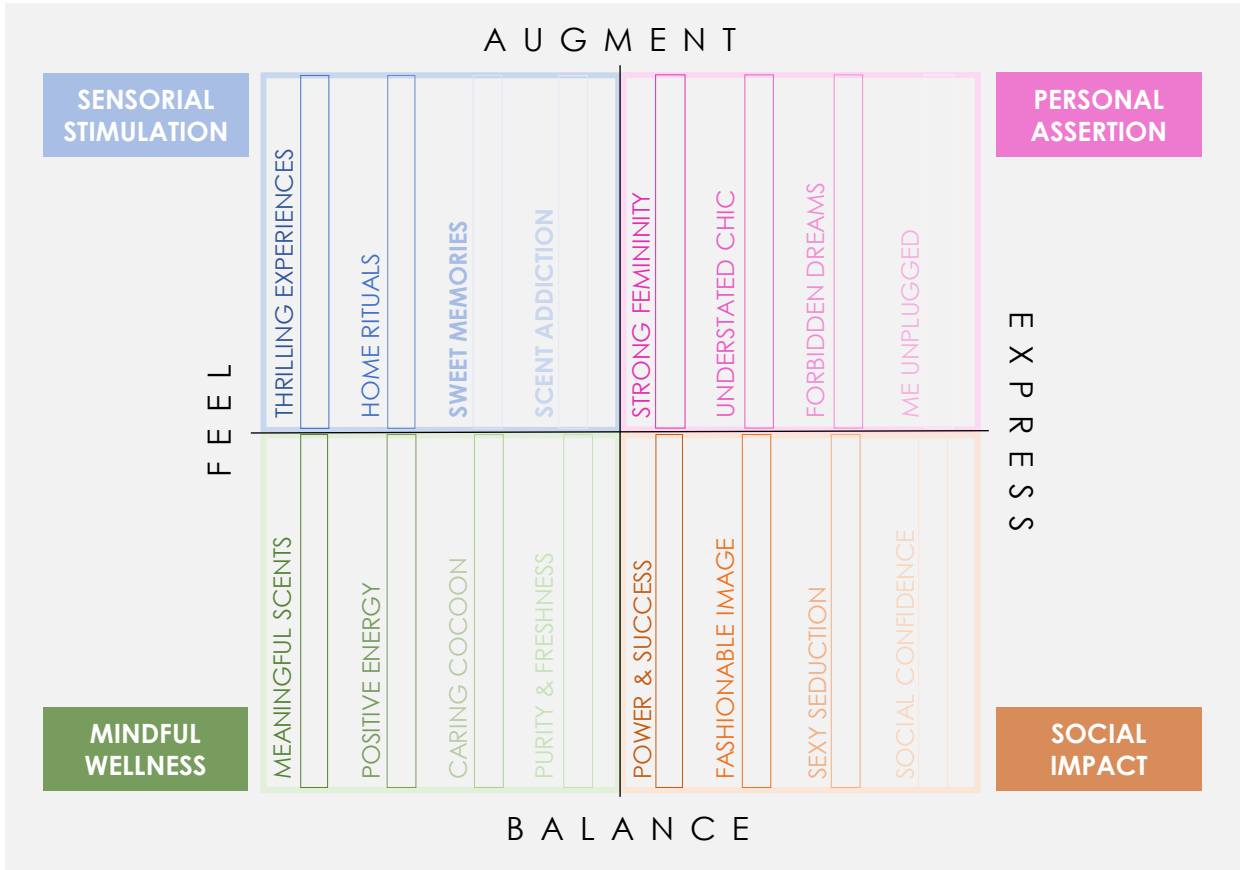


PERFUME KEY NEEDS

DEFINITIONS



STRONG FEMININITY	Perfume empowers me to express my strength and independence as a woman , in the face of accepted gender norms
UNDERSTATED CHIC	Perfume expresses my sophistication, refinement and elegance
FORBIDDEN DREAMS	Perfume expresses my need to come across as a non-conventional individual who dares to walk untrodden paths
ME UNPLUGGED	Perfume expresses my need to be unapologetically, authentically myself , with no regard for conventions and rules
POWER & SUCCESS	Perfume expresses my wish to reach the top and have the highest social impact
FASHIONABLE IMAGE	Perfume expresses my wish to come across as an expert of the latest fashion trends
SEXY SEDUCTION	Perfume expresses my desire to feel sexier, radiate sensual seduction , and make everyone fall under my spell
SOCIAL CONFIDENCE	Perfume boosts my self-confidence and helps me feel 'socially fitting' in any situation (including the professional sphere)
MEANINGFUL SCENTS	Perfume heals me (helps me preserve my body and mind wellness) and the world (helps me make the world fairer, more inclusive, more eco-friendly)
POSITIVE ENERGY	Perfume increases my mental wellbeing through relaxing / uplifting emotions
CARING COCOON	Perfume is a way to treat and pamper myself within my own little happy bubble
PURITY & FRESHNESS	Perfume helps me top up my personal care routine with a clean and fresh feel
THRILLING EXPERIENCES	Perfume is a way to immerse myself in new, intense sensorial experiences
HOME RITUALS	Perfume contributes to an enhanced, more pleasurable home experience
SWEET MEMORIES	Perfume is a way to recall happy times, places, and moments
SCENT ADDICTION	Perfume is a way to surround myself with captivating scents anywhere, anytime

PERFUME KEY NEEDS SIZING OVERVIEW





PERFUME KEY NEEDS

‘RADAR’ MODEL VS PENETRATION SIZING

‘RADAR’ MODEL	PENETRATION SIZING
<p>All respondents have each perfume need, but the need may vary in intensity. The intensity of a respondent's need depends on how much that respondent's answers differ from the answers of all other respondents from the same country. Ideally, need intensity follows a bell curve distribution. A score of 1 means that there are less than 15% of respondents with an equal or higher score on that need in that country.</p> <p>All respondents have a standardized need score ranging approximately from -2 to +2, where 0 corresponds to the mean score of the country.</p> <p>A respondent's need score is the weighted sum of all the need-related statements the respondent strongly agree with or has chosen in a list.</p> <p>The score is standardized by subtracting the country mean score from the respondent score and then dividing by the standard deviation of the need score in the country.</p>	<p>A respondent has a perfume need <u>ONLY IF they strongly agree to (or have chosen from a list) a majority of the statements which define the need.</u> Otherwise, they are not considered as having the need. Whether a respondent has a need or not does not depend on the choices made by other respondents.</p> <p>Need penetration varies between 0 and 100%.</p> <p>A respondent's need score is the weighted sum of all the need-related statements the respondent strongly agree with or has chosen in a list. The scale ranges from 0 to a number between 9 and 16 depending on the need.</p> <p>A respondent is considered as having a need if their score is <u>equal to or higher than half of the full scale.</u> (This rule may be slightly adjusted to take into account the difference of prior probabilities between agreement scales and questions with lists constrained by a maximum number of authorized choices.)</p>
TO BE USED IN PRIORITY TO	
<ul style="list-style-type: none">- Easily compare needs profile between consumer segments in a country: the “radar” allows to see at a glance what stands out in one segment vs another.- Compare consumer segments profiles across countries which have different levels of market maturity- Identify needs which potentially contrast the most consumer segments- Statistically model brand preference- Easily identify asperities in consumer profiles	<ul style="list-style-type: none">- Compare need importance between countries- Rank needs within a population- Understand which needs are fundamentals/pre-requisite of the category, as opposed to needs which are still “niche” in a population- Size a potential (the number of respondents who have declared they have a strong need)- Easily identify overrepresentations on low penetration needs
DRAWBACKS	
<ul style="list-style-type: none">- Not adapted to potential sizing- Less readily understandable (more abstract)- Ranking of needs not easy to see- Underestimates some cultural differences	<ul style="list-style-type: none">- Tends to over-display basic needs with high penetration at the expense of emerging needs- Sensitive to cultural acquiescence bias, which ultimately distorts countries' cumulated profiles

KEY TAKEAWAYS

- In the US, the **social role** of perfume is more prevalent than in other zones and perfume is expected to offer strong **sensorial stimulation**.
- In Europe, perfume use is mostly **inner-directed** and connected to **personal pleasure**.
- In China, perfume use is a marker of **fashion savvy** and **edginess** as well as **personal and social differentiation**.







PERSONAL ASSERTION	28.7	26.6	20.8	38.8
SOCIAL IMPACT	20.7	27.7	13.1	25.2
MINDFUL WELLNESS	26.3	27.4	34.0	17.0
SENSORIAL STIMULATION	34.8	43.9	32.4	32.2

Figures computed on Perfume Users (Apply Perfume / Eau de Toilette at least 3 times a week).
At least 2 needs per territory (Personal Assertion / Social Impact / Mindful Wellness / Sensorial Stimulation).

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
Green/red = significantly over/under world average (statistical reliability at least 95%)

PERFUME KEY NEEDS

OVERVIEW OF CULTURAL DIFFERENCES

	%				
PERSONAL ASSERTION	STRONG FEMININITY	25.6	26.8	19.0	32.2
	UNDERSTATED CHIC	32.6	30.2	26.9	40.4
	FORBIDDEN DREAMS	18.7	17.0	11.9	27.5
	ME UNPLUGGED	24.6	24.7	21.3	28.2
SOCIAL IMPACT	POWER & SUCCESS	11.1	15.9	6.1	14.1
	FASHIONABLE IMAGE	18.4	19.2	8.4	29.1
	SEXY SEDUCTION	26.9	32.2	23.4	27.8
	SOCIAL CONFIDENCE	30.0	35.8	26.4	30.6
MINDFUL WELLNESS	MEANINGFUL SCENTS	22.5	24.3	19.7	24.6
	POSITIVE ENERGY	18.4	19.1	15.0	21.7
	CARING COCOON	24.9	23.3	38.2	10.8
	PURITY & FRESHNESS	37.7	39.1	48.5	24.6
SENSORIAL STIMULATION	THRILLING EXPERIENCES	23.0	28.3	20.6	22.8
	HOME RITUALS	27.0	37.1	25.0	23.5
	SWEET MEMORIES	28.3	30.4	21.3	35.0
	SCENT ADDICTION	38.2	46.6	41.5	29.5



WORLD – PERFUME KEY NEEDS OVERVIEW BY TERRITORY

See next slides for details

%	WORLD	GEN Z (15-25 yo)	MILLENNIALS (26-39 yo)	GEN X (40-54 yo)
PERSONAL ASSERTION	28.7	34.2	29.9	25.3
SOCIAL IMPACT	20.7	21.9	22.3	18.4
MINDFUL WELLNESS	26.3	25.0	26.2	26.9
SENSORIAL STIMULATION	34.8	40.0	36.4	31.0

%	WORLD	ACCESS	HIGH-END	EXCEPTION
PERSONAL ASSERTION	28.7	28.7	29.9	41.3
SOCIAL IMPACT	20.7	20.3	21.2	25.7
MINDFUL WELLNESS	26.3	28.3	25.7	21.2
SENSORIAL STIMULATION	34.8	37.0	35.6	39.1

At least 2 needs per territory (Personal Assertion / Social Impact / Mindful Wellness / Sensorial Stimulation).
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 | Access 1,308 | High End 3,429 | Exception 749
Green/red = significantly over/under world average (statistical reliability at least 95%)

*Access is a mature market in US and Europe, while China is mostly driven by Exception brands.
1 - Internal use



WORLD – PERFUME KEY NEEDS SIZING BY GENERATION

DETAILED RESULTS

	%	GEN Z (15-25 yo)
SCENT ADDICTION	42.8	
UNDERSTATED CHIC	37.1	
PURITY & FRESHNESS	36.6	
SWEET MEMORIES	31.9	
SOCIAL CONFIDENCE	31.7	
STRONG FEMININITY	30.8	
SEXY SEDUCTION	30.3	
HOME RITUALS	30.3	
ME UNPLUGGED	26.2	
THRILLING EXPERIENCES	23.3	
MEANINGFUL SCENTS	23.2	
CARING COCOON	20.8	
POSITIVE ENERGY	19.1	
FORBIDDEN DREAMS	18.3	
FASHIONABLE IMAGE	17.6	
POWER & SUCCESS	13.0	

	%	MILLENNIALS (26-39 yo)
SCENT ADDICTION	37.8	
PURITY & FRESHNESS	36.3	
UNDERSTATED CHIC	32.8	
SOCIAL CONFIDENCE	31.8	
SWEET MEMORIES	31.7	
HOME RITUALS	28.5	
SEXY SEDUCTION	28.2	
STRONG FEMININITY	28.1	
MEANINGFUL SCENTS	26.0	
ME UNPLUGGED	24.2	
THRILLING EXPERIENCES	24.2	
CARING COCOON	21.3	
FASHIONABLE IMAGE	20.0	
FORBIDDEN DREAMS	19.8	
POSITIVE ENERGY	19.3	
POWER & SUCCESS	12.3	

	%	GEN X (40-54 yo)
PURITY & FRESHNESS	39.5	
SCENT ADDICTION	36.8	
UNDERSTATED CHIC	30.6	
CARING COCOON	30.3	
SOCIAL CONFIDENCE	27.3	
ME UNPLUGGED	24.3	
SEXY SEDUCTION	24.1	
HOME RITUALS	24.1	
SWEET MEMORIES	23.2	
THRILLING EXPERIENCES	21.6	
STRONG FEMININITY	20.8	
MEANINGFUL SCENTS	18.3	
FORBIDDEN DREAMS	17.8	
POSITIVE ENERGY	17.0	
FASHIONABLE IMAGE	16.9	
POWER & SUCCESS	9.2	

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

Green/red = significantly over/under world average (statistical reliability at least 95%)



WORLD – PERFUME KEY NEEDS SIZING BY CLASSIFICATION

DETAILED RESULTS

	(EU + US)* % ACCESS
PURITY & FRESHNESS	45.3
SCENT ADDICTION	44.9
HOME RITUALS	32.4
CARING COCOON	31.9
SOCIAL CONFIDENCE	30.5
UNDERSTATED CHIC	27.5
SWEET MEMORIES	27.2
SEXY SEDUCTION	26.1
STRONG FEMININITY	23.4
THRILLING EXPERIENCES	23.3
MEANINGFUL SCENTS	22.8
ME UNPLUGGED	21.4
POSITIVE ENERGY	17.7
FORBIDDEN DREAMS	15.4
FASHIONABLE IMAGE	14.0
POWER & SUCCESS	9.8

	% HIGH END
SCENT ADDICTION	38.6
PURITY & FRESHNESS	36.5
UNDERSTATED CHIC	34.1
SOCIAL CONFIDENCE	30.3
SWEET MEMORIES	29.3
SEXY SEDUCTION	27.5
HOME RITUALS	27.4
STRONG FEMININITY	26.3
ME UNPLUGGED	25.2
CARING COCOON	24
THRILLING EXPERIENCES	23.7
MEANINGFUL SCENTS	22.8
FORBIDDEN DREAMS	19.4
FASHIONABLE IMAGE	19
POSITIVE ENERGY	18.5
POWER & SUCCESS	11.5

	% EXCEPTION
UNDERSTATED CHIC	43.1
SCENT ADDICTION	36.5
SWEET MEMORIES	34.1
STRONG FEMININITY	32.8
SEXY SEDUCTION	31.3
ME UNPLUGGED	31.2
HOME RITUALS	29.7
FORBIDDEN DREAMS	29.0
SOCIAL CONFIDENCE	27.5
THRILLING EXPERIENCES	27.5
MEANINGFUL SCENTS	25.6
PURITY & FRESHNESS	24.7
FASHIONABLE IMAGE	24.0
POSITIVE ENERGY	21.7
CARING COCOON	15.3
POWER & SUCCESS	15.1

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): Access 1,308 | High End 3,429 | Exception 749
Green/red = significantly over/under world average (statistical reliability at least 95%)

*Access is a mature market in US and Europe, while China is mostly driven by Exception brands.

C1 - Internal use

PERFUME KEY NEEDS
DEFINITIONS & INSPIRATIONS





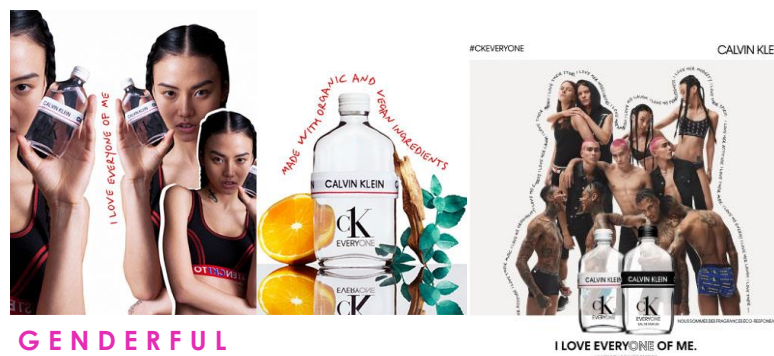
GenZ	0.17
Millenials	0.02
GenX	-0.09
Access	0.06
High End	0.01
Exception	0.20

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COMPONENT ITEMS

- The category which best **expresses what I fight and stand for** is: PERFUME
- I love fragrances that **combine super strong femininity and romanticism**
- I expect my favourite fragrances to **share my convictions on what women should fight and stand for**
- I love it when a fragrance **inspires me to take risks and try new things**
- I sometimes wear **men's perfumes**
- I like the idea that I have both masculine and feminine sides
- I am:
 - Daring
 - Bold
- I dream of being/could see myself as:
 - A great fighter for a better world
 - A feminist
- When I choose a perfume brand, I prefer: **Avant-garde, disruptive, edgy brands**
- I wear fragrance BUT NOT To feel confident NOR To please someone who likes it NOR To be more feminine
- I am NOT cute

INSPIRATION

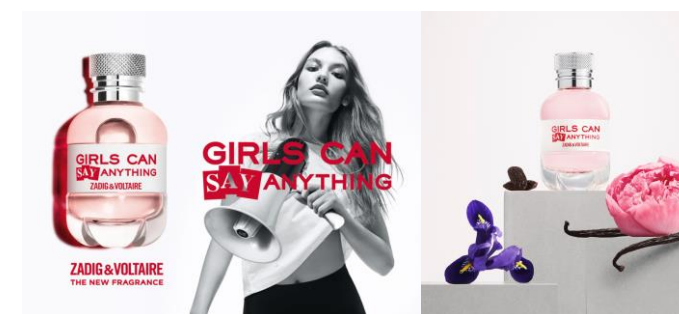


GENDERFUL

Calvin Klein, EVERYONE

"I am one, I am many. I love everyone of me."

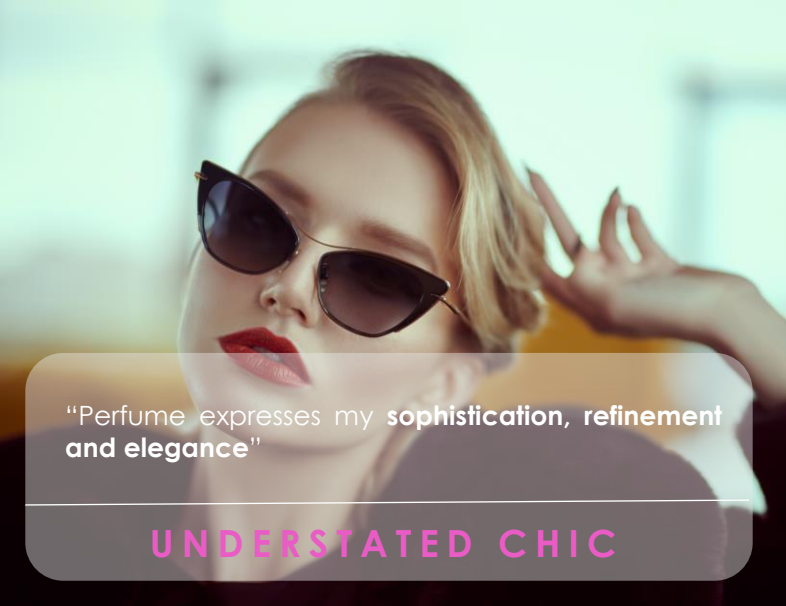
"The campaign features a group of **modern multi-hyphenates**, such as musician and actor Eliot Sumner, skater and photographer Evan Mock, musician and makeup artist MLMA, rapper and dancer Priddy the Opp, and models Cara Taylor and Parker Van Noord. The campaign explores and showcases the collective individuality and **breaking down the status quo. It is a strong celebration of pushing those boundaries, gender norms and definitions.**"



UNBOUNDED

Zadig & Voltaire, GIRLS CAN SAY ANYTHING

"A fragrance claiming its **liberty!** The perfect embodiment of **modern femininity** that dares to express itself openly. A fougère revisited with the floral delicacy of an iris & peony duo and enhanced with tonka & vanilla infused with musks. **An air of audacity** blows over this new olfactory declaration!"



GenZ	0.05
Millenials	-0.01
GenX	-0.01
Access	-0.01
High End	0.03
Exception	0.19

	+
	+

COMPONENT ITEMS

- I wear fragrances to **express refinement, subtlety**
- The fragrance a person wears tells a lot about their **refinement and discernment**
- I take care of my appearance to look high class
- I like having nice things that only connoisseurs can appreciate
- I like shops which have a refined well-being atmosphere (e.g., decoration, music, style)
- I am:
 - Elegant
 - Noble
 - Sophisticated
 - Cosmopolitan
- When I choose a perfume brand, I prefer: **Exclusive brands/ Collection fragrances that not everybody can afford**
- I wear fragrance BUT NOT To feel confident NOR To feel powerful NOR To feel super successful NOR To feel fresh, clean and pure
- When I love a perfume's scent, I buy it even if I don't like the bottle (Strongly DISAGREE)

INSPIRATION



ELEGANCE PERSONIFIED

Frederic Malle, PORTRAIT OF A LADY
 "Portrait of a Lady is a perfume of **absolute refinement**. A **chic fragrance**, a mixture of **profound elegance** and spectacular."
 "Consider perfume a portrait of its wearer: the sound of her voice, her gaze, the way she plays cards. At once timeless and resonant with today, here is a scent that speaks of her **innate sophistication**. Charm that emanates from within, boldly depicted without; **an expressive portrayal of modern grace**."



TIMELESS SOPHISTICATION

Chanel, ALLURE
 "The **very essence of elegance** according to Gabrielle Chanel, who preferred a **simple silhouette without pretence**, asserting a style that goes beyond trends.
 Difficult to define, impossible to resist, ALLURE is the fragrance of a true, radiant woman with **natural elegance**. **A woman who stands out through her gaze, her presence, her grace, her charisma.**"