

FRAGRANCE

Key Needs

VOL 1

L'OREAL LUXE
2021 LUXURY DRIVERS

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123456789012

sociovision
GROUPE IFOP



AGENDA

EXECUTIVE SUMMARY

01 SAMPLE
& TARGET DEFINITIONS

02 PERFUME USE TODAY

03 PERFUME KEY NEEDS
OVERVIEW



EXECUTIVE SUMMARY

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DATA SOURCE

A dedicated online survey of **selective women 15-54***, covering the US, Europe 5 (France, UK, Germany, Italy, Spain) and China.

In order to understand selective consumers' **benefits, attitudes and behaviours** towards perfume, **16 key needs** were identified **across** 4 territories (see opposite).



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.

KEY HIGHLIGHTS



US & EUROPE

Western Europe remains the 1st WW market in terms of usage penetration (78% of selective women use perfume daily), while the **US has made some progress** (daily usage: 64%, +7%).

Post-covid recovery is well underway, as **daily use is up** across all generations (and most markedly so among US GENZers).

Regarding underlying motivations:

- In Europe, perfume use is mostly **inner-directed** and connected to **personal pleasure**. Perfume use is mostly linked to **MINDFUL SELFCARE** (Smelling fresh in order to Feel Good) and brands are expected to blend Chic with consciousness (an ideal brand being Couture + Eco-friendly + Safe)
- In the US, perfume fulfils first and foremost **a social role** and is expected to offer strong **sensorial stimulation**. Perfume use is mostly driven by a need for **FRESHNESS** and **SEXY CONFIDENCE**. In order to seduce, brands needs to be "**cool**" and meet customer's expectations regarding **ethics** (inclusivity and eco-friendliness).



CHINA

Daily use of perfume has become a habit for **more than half (53%) of selective Chinese women**. Usage increase between 2017 and 2021 is especially strong among GenZ (from 32% to 56%).

- Selective consumers have turned to perfume as **a new way of expressing themselves**, namely a marker of **fashion savvy and edginess** as well as **personal and social differentiation**.
- Note that **Exception is driving the market**, (34% of all selective Chinese perfume users have used an Exception level perfume in the past 6 months (vs 10% in Europe / 15% in US)).

*Selective Perfume Users (**at least 2/3 times a week**) = Selective Perfume Buyers who use Perfume / Eau de toilette at least 3 times a week. (See price points by country at the end of the Methodology section).

DAILY USAGE OF PERFUME/EAU DE TOILETTE

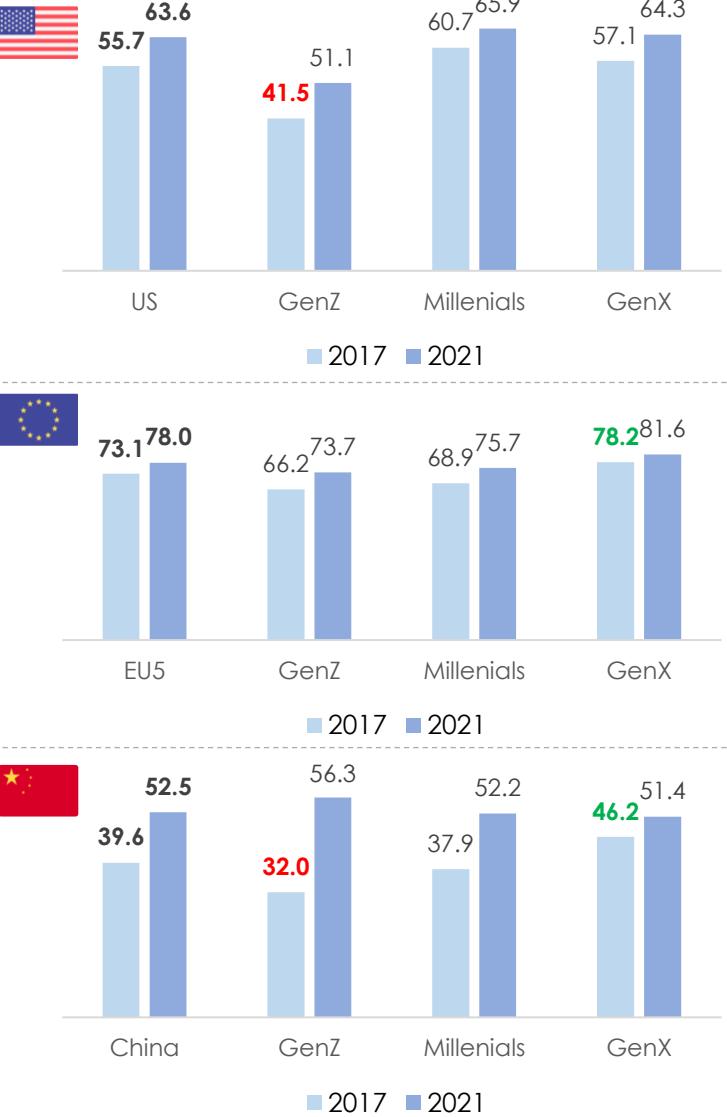
FROM 2017 (PRE-COVID) TO 2021

% Use perfume/eau de toilette **everyday or so**

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



Green/red: significantly over/under Zone average (stat. reliability at least 95%)



Figures computed on Selective Perfume **WEEKLY USERS** in order to guarantee comparable results with the 2017 Drivers wave.



KEY TAKEAWAYS

WORLD



GEN Z (15-25 yo)	MILLENNIALS (26-39 yo)	GENX (45-54 yo)
GEN ZERS LAND OF OPPORTUNITY Gen Z are connected with a large variety of perfume key needs, namely: <ul style="list-style-type: none">Desire for addictive scents, triggering memories.New age of femininity; strong, powerful, successful, confident and sexy (+ over-index (vs. the oldest generations) on preference for gender-inclusive perfume brands)Quest for perfumes which are cool with a conscious touch (meaningful scents).	PERFUME WITH PURPOSE <ul style="list-style-type: none">Fragrant pleasant flashbacks, beyond just smelling nice.Personal assertion (strong femininity).Demand for smart transparency (i.e., fragrances created in a responsible and sustainable way).	PAMPERING WITHOUT 'BLING' <ul style="list-style-type: none">A simple way to pamper oneself (as opposed to Gen Z).
ACCESS	EXCEPTION	
ALL ZONES ME-POTENTIALIZER Perfume key needs: <ul style="list-style-type: none">Strong femininity.Forbidden dreams.Home rituals.	US + EU5 ENHANCED EXPERIENCE Perfume key needs: <ul style="list-style-type: none">Home rituals.Sweet memories.Forbidden dreams.Fashionable image.	CATEGORY GAME CHANGER 3 key needs pillars: <ul style="list-style-type: none"><u>Personal assertion</u>: Understated chic / Strong femininity / Me unplugged / Forbidden dreams.<u>Social impact</u>: Sexy seduction / Fashionable image / Power and success.<u>Sensorial stimulation</u>: Sweet memories / Thrilling experiences.

US	EU	China
SELF- & EXPERIENCE- DISCOVERY	EXCEPTION AS THE ABSOLUTE REFERENCE	NO RULES, MORE CREATIVITY
The engagement in the category is essentially driven by Exception users and Millennials . <ul style="list-style-type: none">Exception users are mostly focused on personal assertion as well as sexy seduction.Millennials are more keen to a balanced mix between social impact, personal assertion, sensorial stimulation and mindful wellness, -- for instance, expecting thrilling experiences and meaningful scents.	The engagement in the category is largely driven by Exception users , who over-index on a broad spectrum of key needs including all dimensions led by the edgiest / youngest generation (e.g., mindful wellness and strong femininity).	China is mostly driven by Exception brands : <ul style="list-style-type: none">Helping consumers to express their individuality, stand out from the crowd and dare the unexpected. <u>White space alert</u> : Developing the scent signature / scent addiction would probably take the Chinese market to the next level.



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TOTAL WOMEN 15-54 yo

Samples (weighted)

Samples representativity

SELECTIVE PERFUME BUYERS

Selective Perfume Buyers = Bought P12M at least 1 perfume above a given price-point. (See price points by country at the end of the Methodology section)

SELECTIVE PERFUME USERS (AT LEAST 2-3 TIMES A WEEK)

Selective Perfume Users (at least 2/3 times a week) = Selective Perfume Buyers who use Perfume / Eau de toilette at least 3 times a week

SELECTIVE PERFUME USERS

DEFINITIONS & SAMPLES BY ZONE



WORLD
(USA, EU5, CHINA)



USA



EU5



CHINA

5 500 women

1 442 women

2 085 women

1 974 women

Top 50%

Top 80%

Top 20% (urban areas)

4 320 women

939 women

1 690 women

1 691 women

78.5%

65.1%

81.1%

85.7%

3 779 women

804 women

1 577 women

1 398 women

68.7%

55.8%

75.6%

70.8%

Reading. Among total population, Selective perfume users represent 68.7% of women 15-54.

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



SELECTIVE PERFUME USERS

DEFINITIONS & SAMPLES BY GENERATION



WORLD
(USA, EU5, CHINA)
(15-54 yo)

TOTAL WOMEN
Sample (weighted)

SELECTIVE PERFUME BUYERS

Selective Perfume Buyers = Bought P12M at least 1 perfume above a given price-point. (See price points by country at the end of the Methodology section)

**SELECTIVE PERFUME USERS
(AT LEAST 2-3 TIMES A WEEK)**

Selective Perfume Users (at least 2/3 times a week) = Selective Perfume Buyers who use Perfume / Eau de toilette at least 3 times a week

Gen. Z
(15-25 yo)

5 500 women

677 women

72.6%

4 320 women

78.5%

1 863 women

Millennials
(26-39 yo)

2 307 women

80.7%

Gen. X
(40-54 yo)

2 261 women

1 781 women

78.8%

3 779 women

68.7%

578 women

62.0%

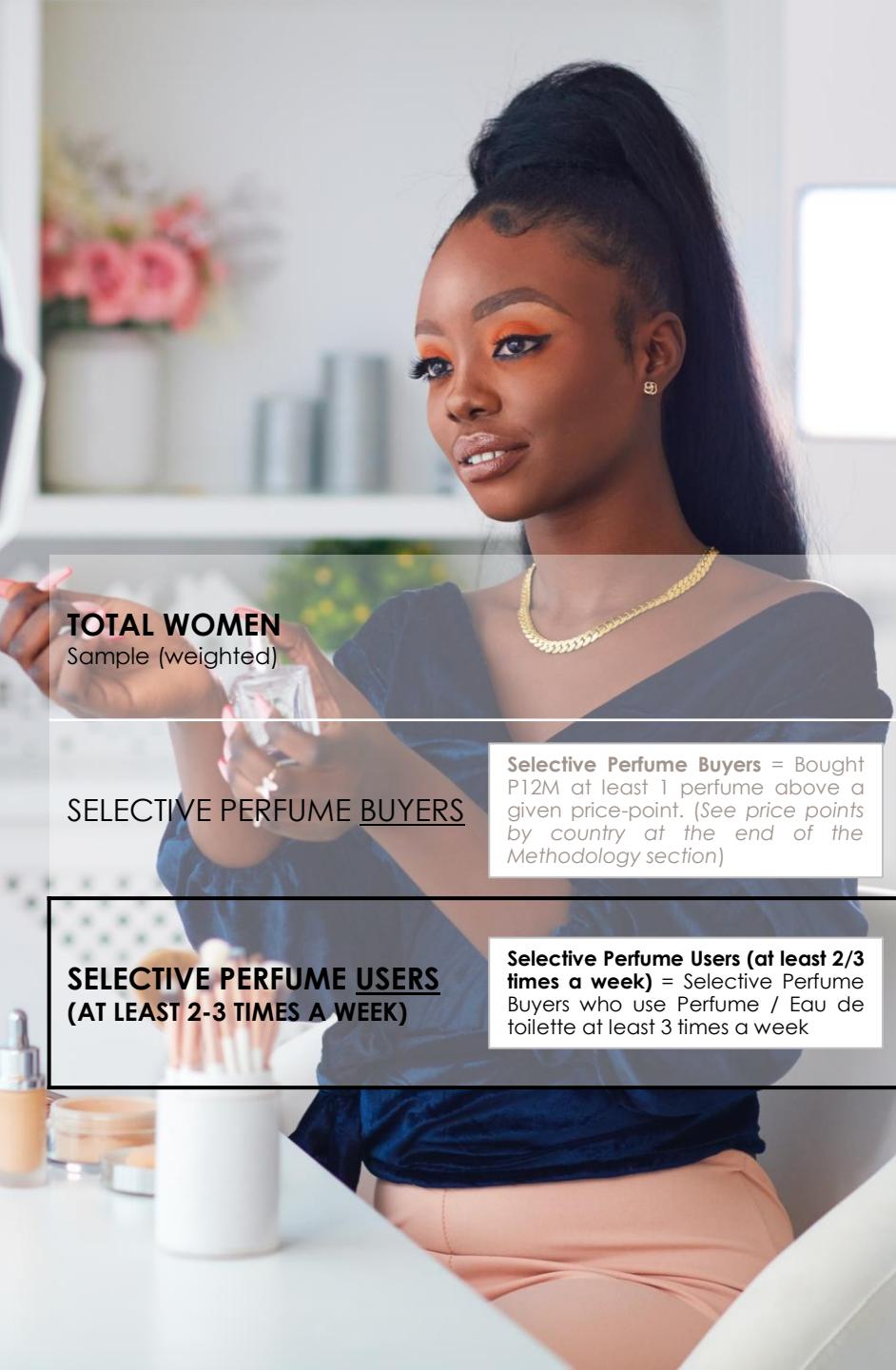
1 679 women

72.8%

1 523 women

67.4%

Reading. Among total population, Selective perfume users represent 62.0% of Gen. Z women.



SELECTIVE PERFUME USERS

DEFINITIONS & SAMPLES BY AGE

WORLD (USA, EU5, CHINA) (15-54 yo)	15-19 yo	20-29 yo	30-34 yo	35-44 yo	45-54 yo
5 500 women	375 women	1 219 women	720 women	1 712 women	1 474 women
4 320 women	245 women	967 women	590 women	1 342 women	1 176 women
78.5%	65.4%	79.3%	82.0%	78.4%	79.8%
3 779 women	199 women	848 women	523 women	1 226 women	983 women
68.7%	53.1%	69.6%	72.6%	71.6%	66.7%

Reading. Among total population, Selective perfume users represent 53.1% of women 15-19.

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



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