

# 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

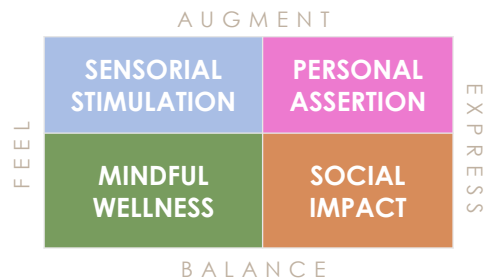


# EXECUTIVE SUMMARY 1/2

## 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 need 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).

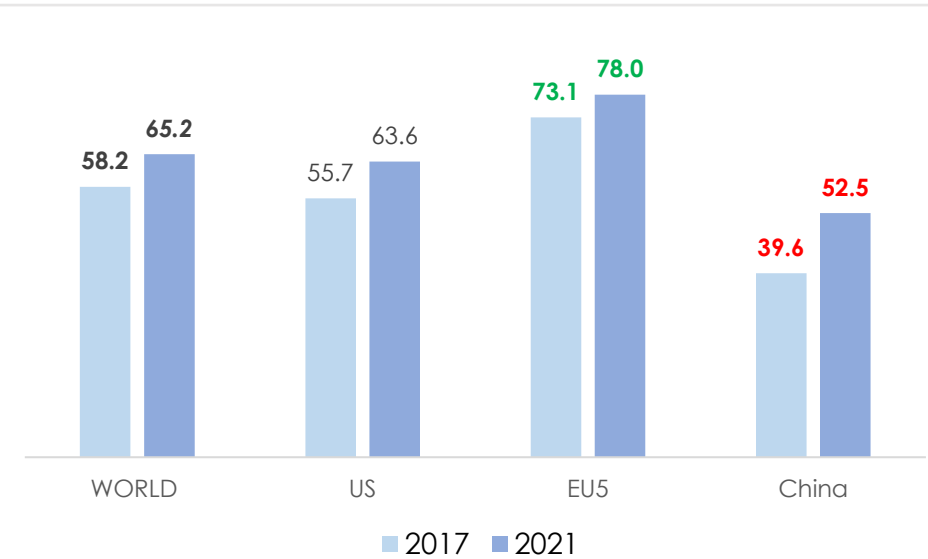
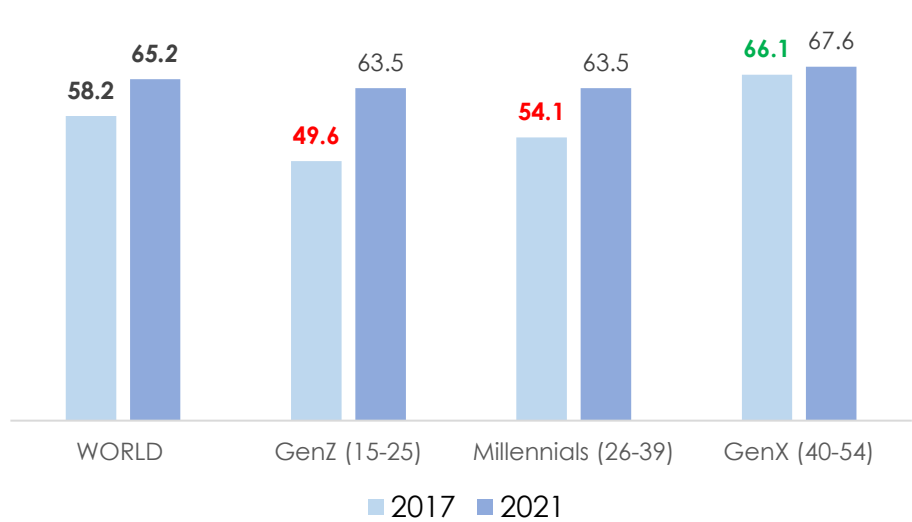
**\*Online survey of 5,500 WOMEN 15-54 in the US (top 50%), EU5 (top 80%) and CHINA (top 20% urban areas)** - Fieldwork: October - December 2021

# DAILY USAGE OF PERFUME/EAU DE TOILETTE

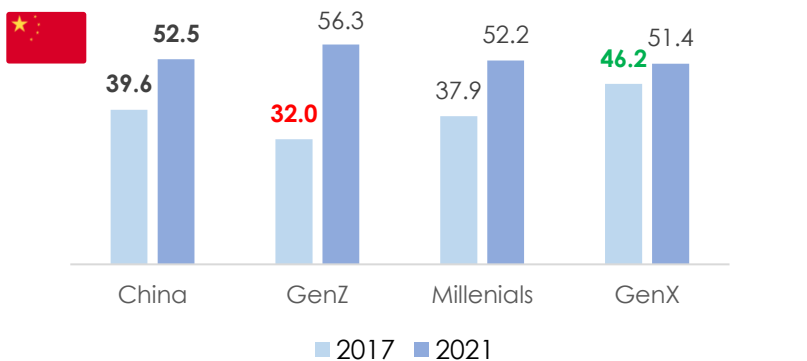
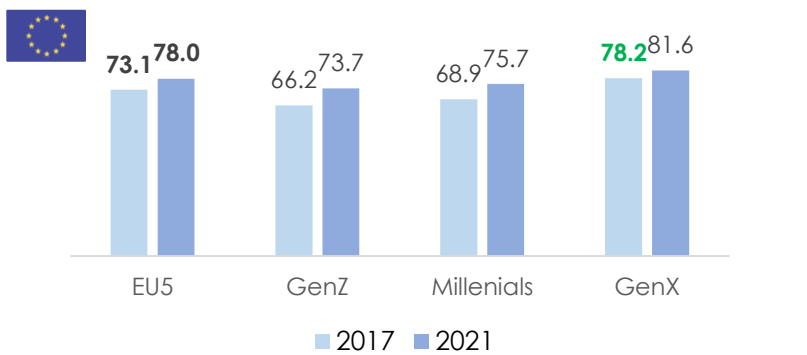
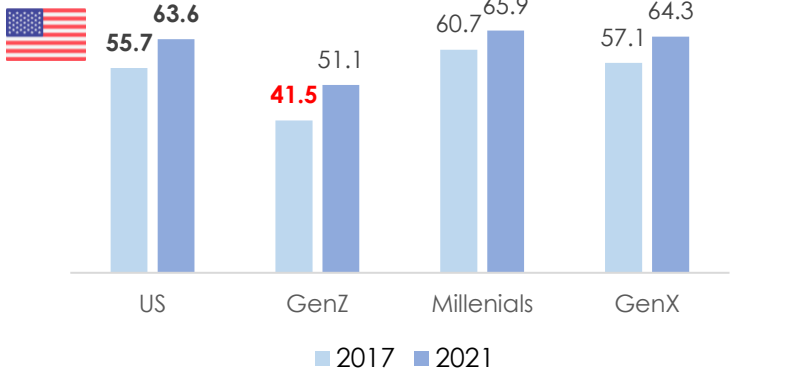
FROM 2017 (PRE-COVID) TO 2021

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

		
<b>SELF- &amp; EXPERIENCE- DISCOVERY</b>  The engagement in the category is essentially driven by <b>Exception users</b> and <b>Millennials</b> . <ul style="list-style-type: none"><li>• Exception users are mostly focused on personal assertion as well as sexy seduction.</li><li>• 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.</li></ul>	<b>EXCEPTION AS THE ABSOLUTE REFERENCE</b>  The engagement in the category is largely driven by <b>Exception users</b> , 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).	<b>NO RULES, MORE CREATIVITY</b>  China is mostly driven by <b>Exception brands</b> : <ul style="list-style-type: none"><li>• Helping consumers to express their individuality, stand out from the crowd and dare the unexpected.</li></ul> <i>White space alert: Developing the scent signature / scent addiction would probably take the Chinese market to the next level.</i>



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# SELECTIVE PERFUME USERS

## DEFINITIONS & SAMPLES BY ZONE

### 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



**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.

# SELECTIVE PERFUME USERS

## DEFINITIONS & SAMPLES BY GENERATION



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

**Gen. Z**  
(15-25 yo)

**Millennials**  
(26-39 yo)

**Gen. X**  
(40-54 yo)

**TOTAL WOMEN**  
Sample (weighted)

5 500 women

932 women

2 307 women

2 261 women

**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)

4 320 women

677 women

1 863 women

1 781 women

78.5%

**72.6%**

**80.7%**

78.8%

**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

3 779 women

**578 women**

**1 679 women**

**1 523 women**

68.7%

**62.0%**

**72.8%**

**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

### TOTAL WOMEN

Sample (weighted)

5 500 women

375 women

1 219 women

720 women

1 712 women

1 474 women

### 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)

4 320 women

245 women

967 women

590 women

1342 women

1 176 women

78.5%

**65.4%**

79.3%

**82.0%**

78.4%

79.8%

### 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

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.



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