

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 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)).

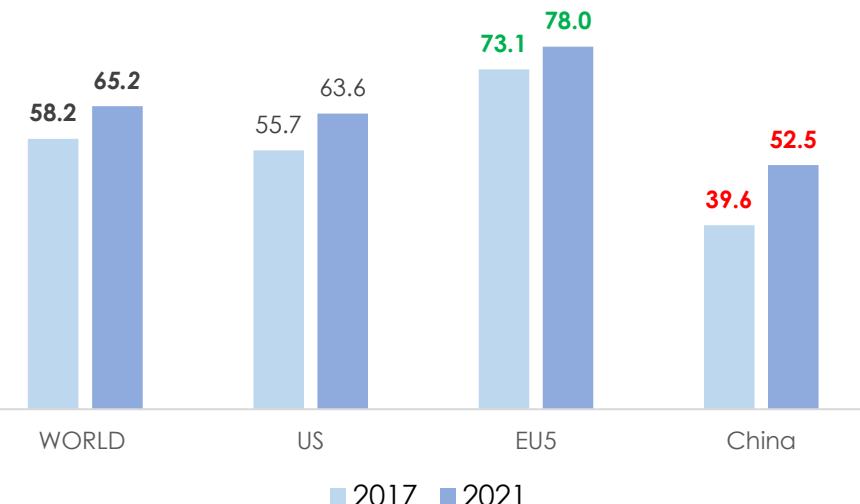
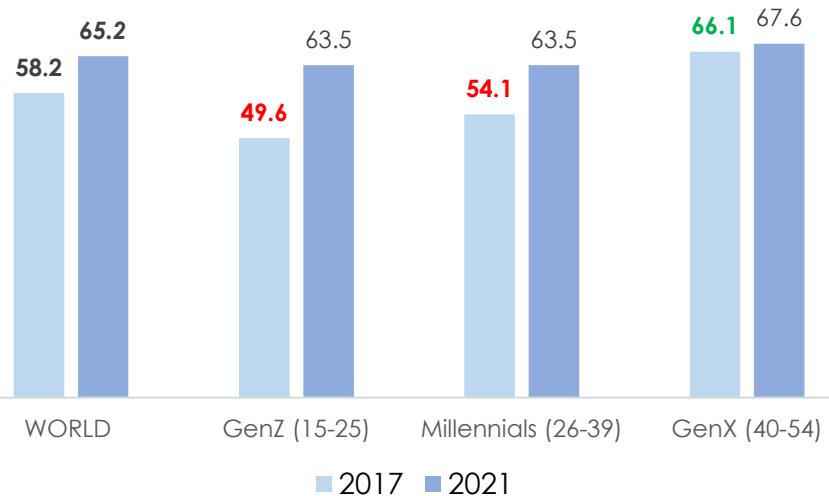
*Selective Perfume Users (**at least 2/3 times a week**) = Selective Perfume Buyers who use Perfume / Eau de toilette at least 3 times a week. (See price points by country at the end of the Methodology section).

DAILY USAGE OF PERFUME/EAU DE TOILETTE

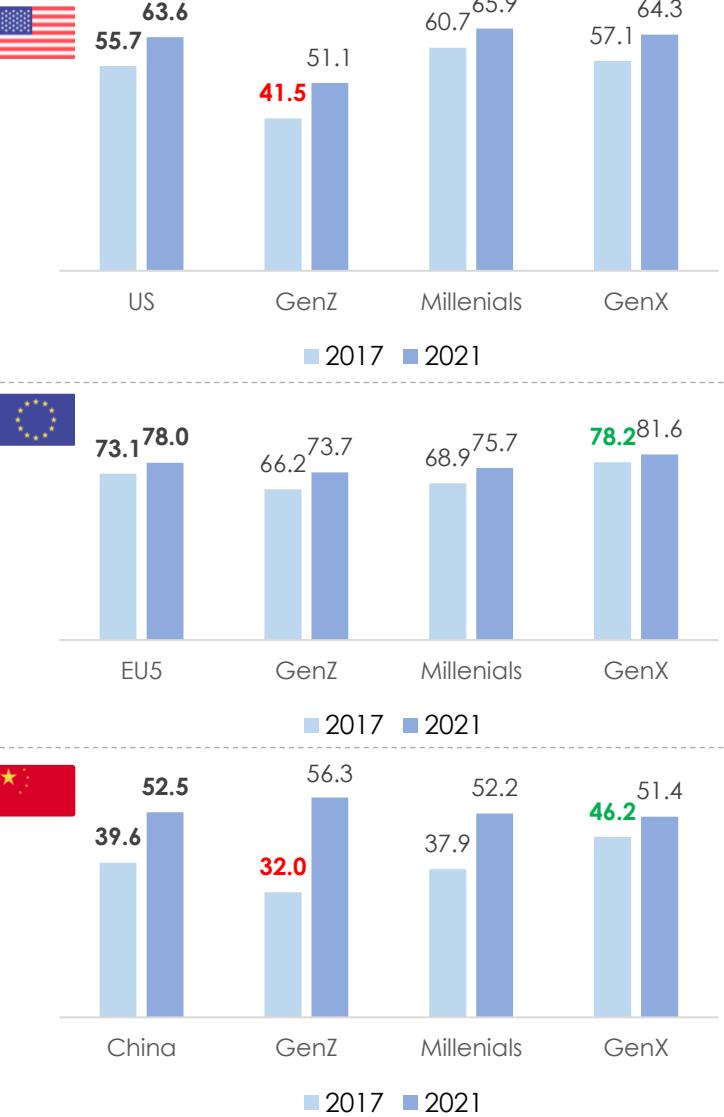
FROM 2017 (PRE-COVID) TO 2021

% 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

4 320 women

78.5%

932 women

72.6%

3 779 women

68.7%

578 women

62.0%

Millennials
(26-39 yo)

2 307 women

1 863 women

80.7%

Gen. X
(40-54 yo)

2 261 women

1 781 women

78.8%

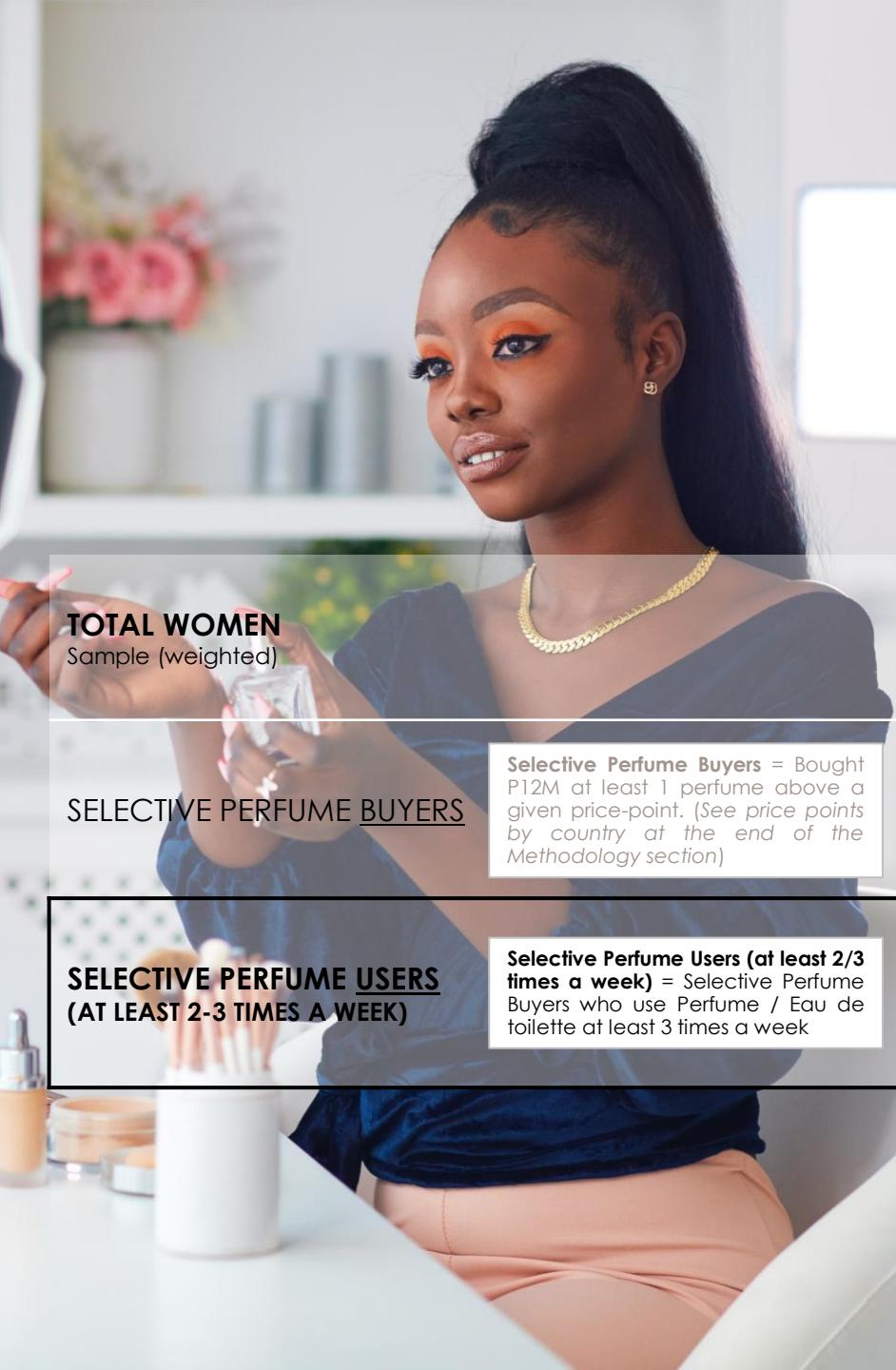
1 679 women

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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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

2 or 3 times a week **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

Once a week **3,4**

Once a week **8,6**

Less often / Never 6,2

Less often / Never 6,9

Less often / Never **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.

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

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.

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

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).

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.

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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

GEN X (40-54)

#1 To feel good and have a sense of well-being	33,7
#2 To treat myself	31,7
#3 To feel fresh, clean and pure	31,6
#4 To pamper myself	29,2
#5 To add a final touch, whenever I get dressed up	28,2
#6 To feel confident	27,0
#7 To be more feminine	26,3
#8 To express my personality, my uniqueness	25,2
#9 To feel energized, vibrant/ To boost my mood	21,5
#10 To feel sexy/attractive to others	19,0

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

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

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

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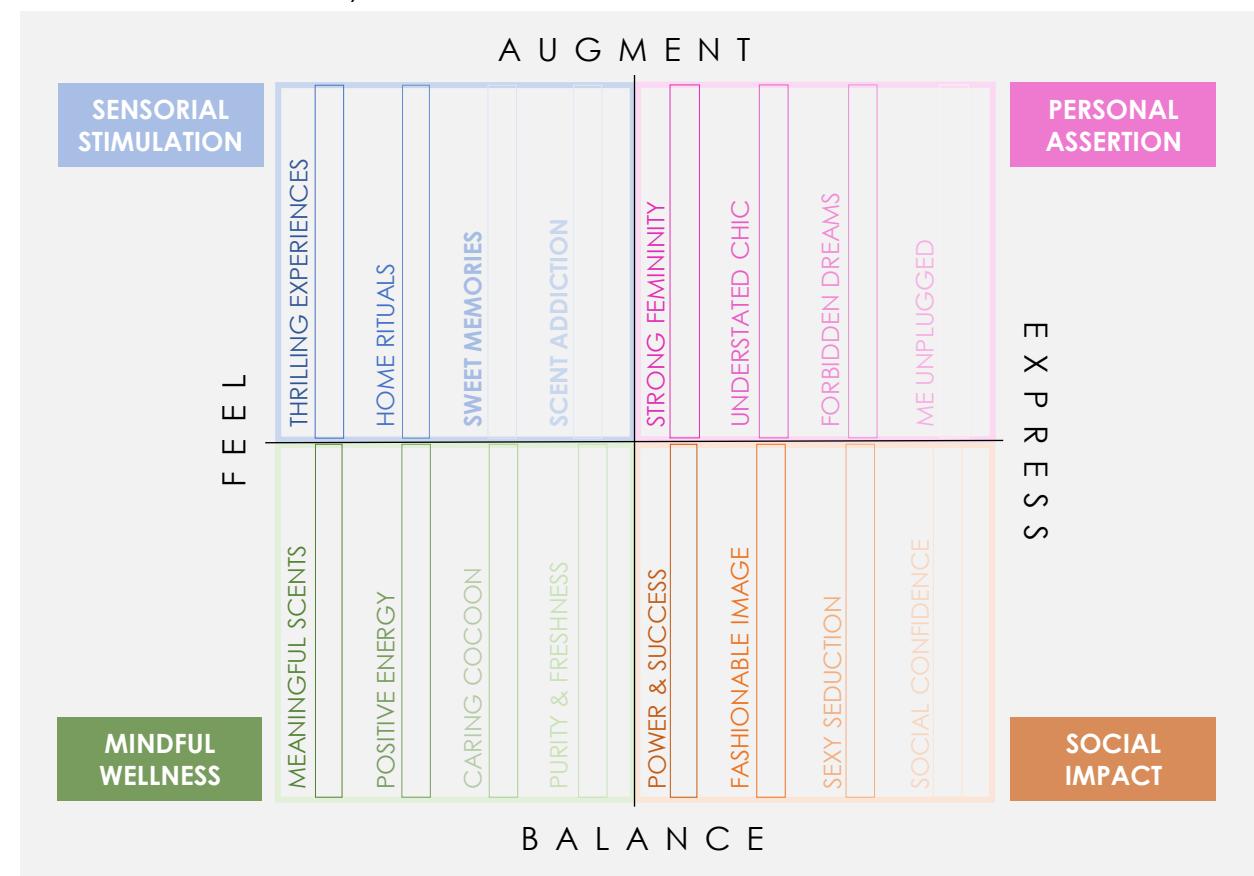


PERFUME KEY NEEDS METHODOLOGY (1 / 2)

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.**

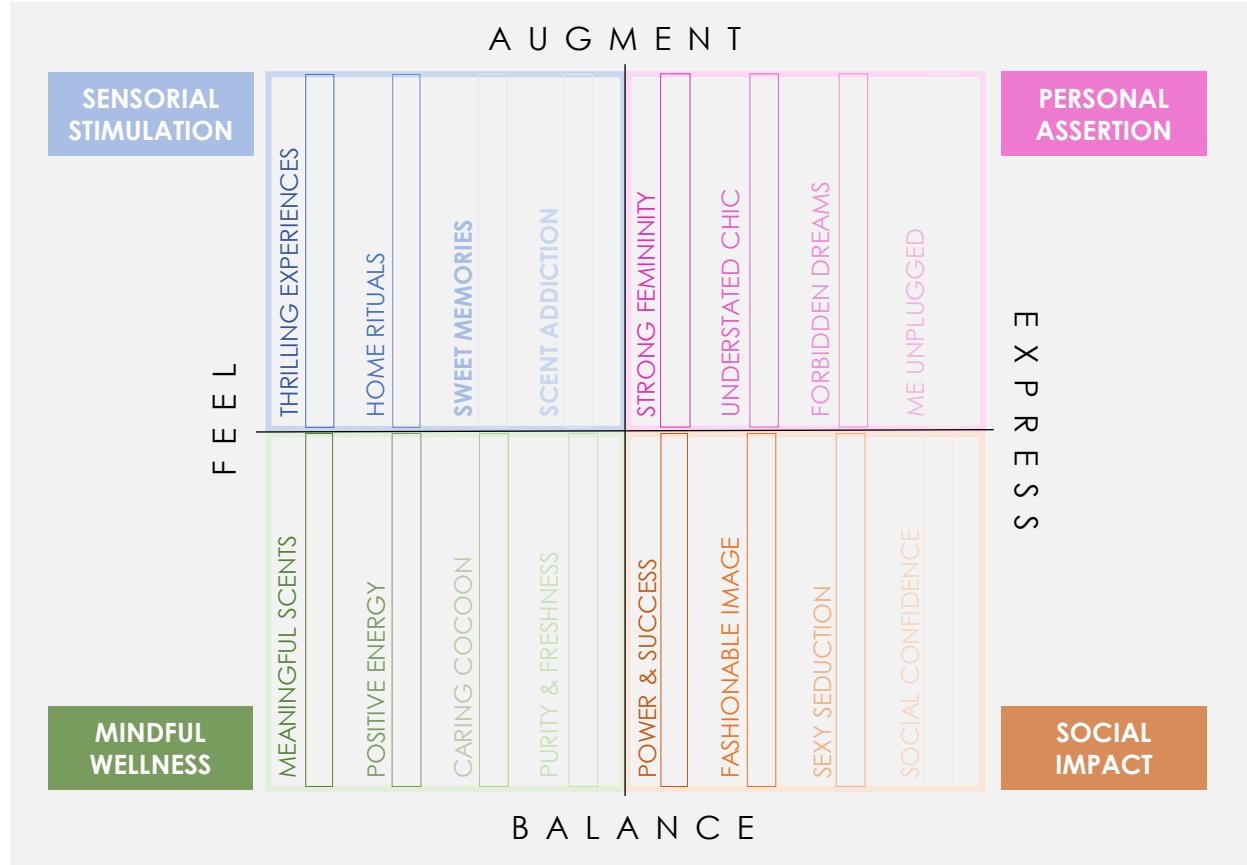
- All statements/choices within each dimension have been checked for correlation consistency within EU5, US and China samples.
- Confirmatory factor analysis has validated that all important statistical dimensions computed from the raw data are correctly represented by the set of the 16 branches
- All 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).

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

A black and white photograph of a woman with dark hair pulled back, wearing a shiny, ribbed, long-sleeved top. She is looking down at a clear, faceted perfume bottle she is holding with both hands. The background is a plain, light color.

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 ONLY IF they strongly agree to (or have chosen from a list) a majority of the statements which define the need. 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 equal to or higher than half of the full scale. (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

PERFUME KEY NEEDS

OVERVIEW OF CULTURAL DIFFERENCES

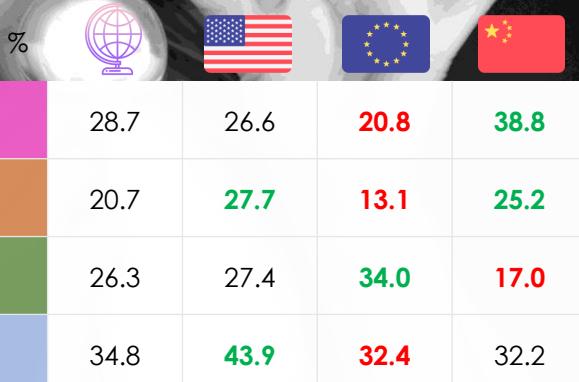
%



	PERSONAL ASSERTION	SOCIAL IMPACT	MINDFUL WELLNESS	SENSORIAL STIMULATION
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
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
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
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

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**.



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%)



WORLD – PERFUME KEY NEEDS OVERVIEW BY TERRITORY

See next slides for details

	%	WORLD	GEN Z (15-25 yo)	YOUTH (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.

C1 - Internal use

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WORLD – PERFUME KEY NEEDS SIZING BY GENERATION

DETAILED RESULTS

GEN Z (15-25 yo)		MILLENNIALS (26-39 yo)		GEN X (40-54 yo)	
	%		%		%
SCENT ADDICTION	42.8	SCENT ADDICTION	37.8	PURITY & FRESHNESS	39.5
UNDERSTATED CHIC	37.1	PURITY & FRESHNESS	36.3	SCENT ADDICTION	36.8
PURITY & FRESHNESS	36.6	UNDERSTATED CHIC	32.8	UNDERSTATED CHIC	30.6
SWEET MEMORIES	31.9	SOCIAL CONFIDENCE	31.8	CARING COCOON	30.3
SOCIAL CONFIDENCE	31.7	SWEET MEMORIES	31.7	SOCIAL CONFIDENCE	27.3
STRONG FEMININITY	30.8	HOME RITUALS	28.5	ME UNPLUGGED	24.3
SEXY SEDUCTION	30.3	SEXY SEDUCTION	28.2	SEXY SEDUCTION	24.1
HOME RITUALS	30.3	STRONG FEMININITY	28.1	HOME RITUALS	24.1
ME UNPLUGGED	26.2	MEANINGFUL SCENTS	26.0	SWEET MEMORIES	23.2
THRILLING EXPERIENCES	23.3	ME UNPLUGGED	24.2	THRILLING EXPERIENCES	21.6
MEANINGFUL SCENTS	23.2	THRILLING EXPERIENCES	24.2	STRONG FEMININITY	20.8
CARING COCOON	20.8	CARING COCOON	21.3	MEANINGFUL SCENTS	18.3
POSITIVE ENERGY	19.1	FASHIONABLE IMAGE	20.0	FORBIDDEN DREAMS	17.8
FORBIDDEN DREAMS	18.3	FORBIDDEN DREAMS	19.8	POSITIVE ENERGY	17.0
FASHIONABLE IMAGE	17.6	POSITIVE ENERGY	19.3	FASHIONABLE IMAGE	16.9
POWER & SUCCESS	13.0	POWER & SUCCESS	12.3	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		HIGH END		EXCEPTION	
%		%		%		%	
PURITY & FRESHNESS	45.3	SCENT ADDICTION	38.6	UNDERSTATED CHIC	43.1		
SCENT ADDICTION	44.9	PURITY & FRESHNESS	36.5	SCENT ADDICTION	36.5		
HOME RITUALS	32.4	UNDERSTATED CHIC	34.1	SWEET MEMORIES	34.1		
CARING COCOON	31.9	SOCIAL CONFIDENCE	30.3	STRONG FEMININITY	32.8		
SOCIAL CONFIDENCE	30.5	SWEET MEMORIES	29.3	SEXY SEDUCTION	31.3		
UNDERSTATED CHIC	27.5	SEXY SEDUCTION	27.5	ME UNPLUGGED	31.2		
SWEET MEMORIES	27.2	HOME RITUALS	27.4	HOME RITUALS	29.7		
SEXY SEDUCTION	26.1	STRONG FEMININITY	26.3	FORBIDDEN DREAMS	29.0		
STRONG FEMININITY	23.4	ME UNPLUGGED	25.2	SOCIAL CONFIDENCE	27.5		
THILLING EXPERIENCES	23.3	CARING COCOON	24	THRILLING EXPERIENCES	27.5		
MEANINGFUL SCENTS	22.8	THRILLING EXPERIENCES	23.7	MEANINGFUL SCENTS	25.6		
ME UNPLUGGED	21.4	MEANINGFUL SCENTS	22.8	PURITY & FRESHNESS	24.7		
POSITIVE ENERGY	17.7	FORBIDDEN DREAMS	19.4	FASHIONABLE IMAGE	24.0		
FORBIDDEN DREAMS	15.4	FASHIONABLE IMAGE	19	POSITIVE ENERGY	21.7		
FASHIONABLE IMAGE	14.0	POSITIVE ENERGY	18.5	CARING COCOON	15.3		
POWER & SUCCESS	9.8	POWER & SUCCESS	11.5	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

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PERFUME KEY NEEDS DEFINITIONS & INSPIRATIONS



AUGMENT



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

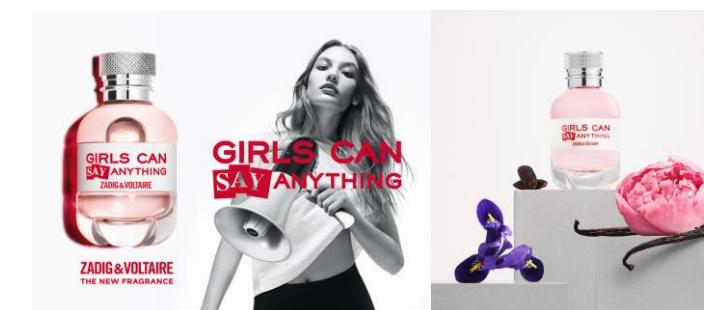


GENDERFUL

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."

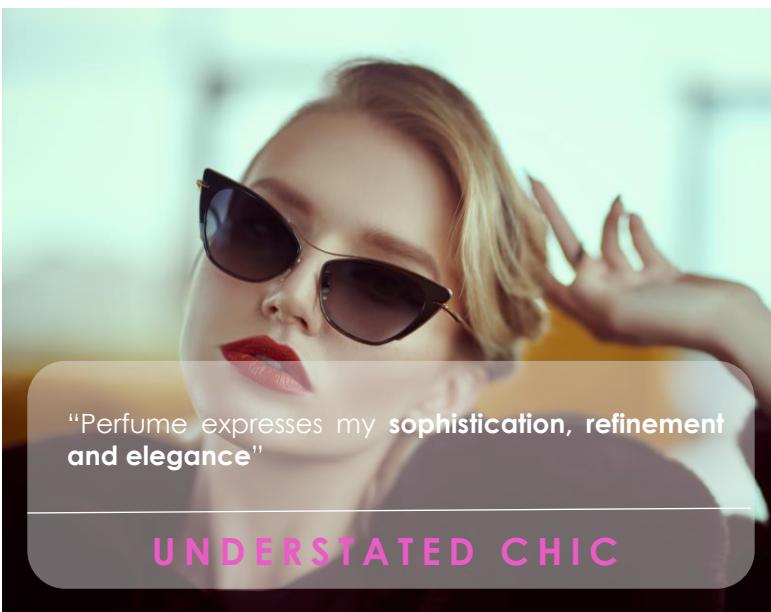


UNBOUNDED

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!"

AUGMENT



UNDERSTATED CHIC

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

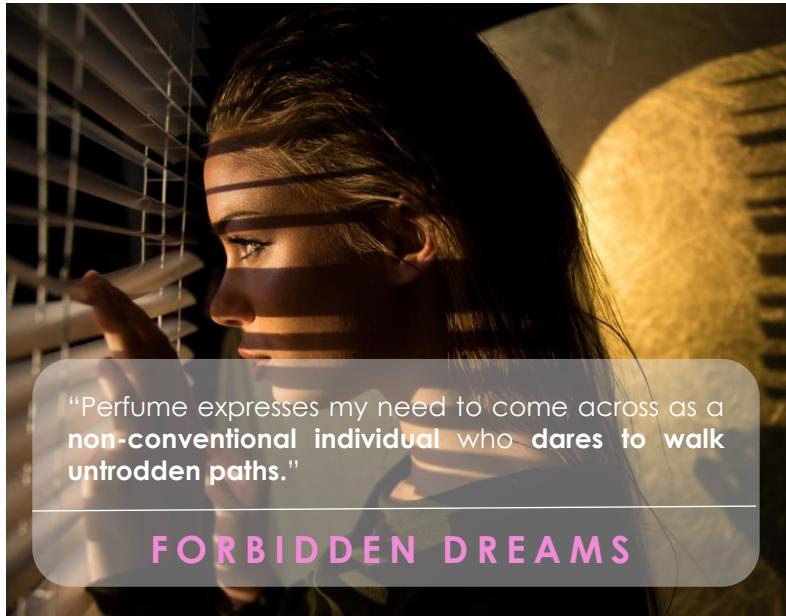
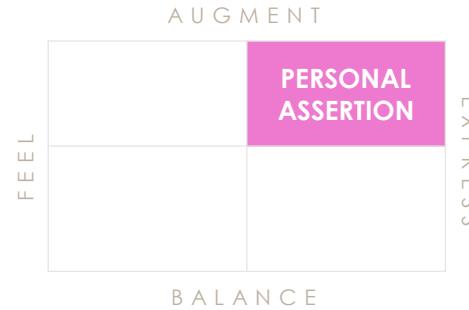
Chanel, ALLURE

"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."

Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).



GenZ	0.02
Millenials	0.05
GenX	-0.06
Access	0.07
High End	0.02
Exception	0.23

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	++

COMPONENT ITEMS

- I am a **very different person** when I wear my favourite fragrance
- I wear fragrance to **feel like a different person**
- I wear fragrance to **feel ready to do things I have never done before**
- I wear fragrance to be **non-conventional, to shock people**
- I am:
Mysterious
Dramatic
Unconventional
- I would like to be more:
Mysterious
Dramatic
Unconventional
- I dream of being:
A beautiful princess
A pop star
A mysterious woman with unexpected/hidden facets
- When I choose a perfume brand, I prefer: **Brands whose ads campaigns show my favourite celebrities/influencers**
- The category which best help me to be myself, express my unique identity is NOT PERFUME

INSPIRATION



INTO THE WILD

Givenchy, L'INTERDIT

"A white flower crossed by a dark woody accord. L'Interdit Eau de Parfum for women — a fearless fragrance imbued with the **frisson of freedom. Transgress your limits** with audacity and feel empowered on the journey to self-discovery."

SUBVERTING EXPECTATIONS

Gucci, FLORA

"The Flora Gorgeous Gardenia campaign is a challenge to reinterpret the world of flowers in an **unexpected way. The inspiration comes from Miley Cyrus, an artist with a spirit that is both rock 'n' roll and eclectic at the same time**" Says Alessandro Michele, Creative Director at Gucci.

"@gucci and I have felt like family for a long time in our collaborations which have always revolved around **vibrant color (...)** and **unapologetic contradiction (...)**. **None of us are made with one ingredient. We all have different notes, some subtle and some bold.** Just like Flora!" the singer wrote on Instagram.



Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).

AUGMENT



GenZ	0.06
Millenials	-0.02
GenX	0.00
Access	-0.02
High End	0.01
Exception	0.16

	-
	+

COMPONENT ITEMS

- The category which best helps me **be myself, express my unique identity** is: **PERFUME**
- I wear fragrance to **express my personality, my uniqueness**
- I do what I like, regardless of what others may think
- I sometimes speak or behave in a way that shocks people
- I am:
 - Unique, different
 - Unpredictable
- I dream of being:
 - A free spirit, who doesn't follow other people's rules
 - An artist (actress, musician, writer, painter, etc.)
 - An explorer/ adventurer
- I am NOT Social NOR Caring
- I wear fragrance BUT NOT To feel confident NOR To please someone who likes it NOR To feel fresh, clean and pure
- When I choose a perfume brand, I prefer: **Independant brands (Indie brand) / Brands hardly anybody knows**

INSPIRATION



FEARLESS FREEDOM

Givenchy, IRRESISTIBLE

"Fran Summers is the face of this new fragrance. Her talent, **authenticity** and natural grace make her a regular at fashion shows, especially chez Givenchy. Her presence alone is **an invitation to partying and letting-go**. Just like Fran, the truly IRRESISTIBLE woman is **lively, vivacious, irresistibly authentic**. Someone people love to follow, emulate and hold close. **In a spirit of total freedom, this fragrance beckons to let go, reach out and link up.**"



CELEBRATING INDIVIDUALITY

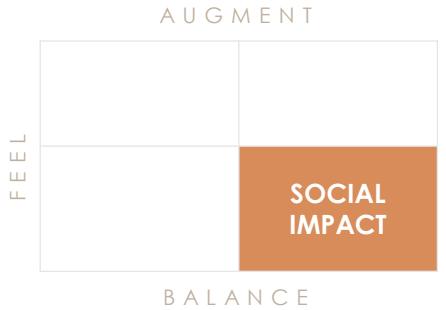
Marc Jacobs, PERFECT

It's no secret that Jacobs **celebrates self-love, authenticity and individuality**. "With the new fragrance, Jacobs is looking to **amplify the message of individualism, and redefine what "perfect" means** (...).

That indeed translates to the campaign, which includes a video and a collage of portraits and vignettes **showcasing the individuality of the large cast**. (...) 'I feel like it **expresses self-expression and creativity**, and it validates this idea of style and individuality, and I think that's something that fashion has missed for many, many years. It's always like, 'Oh, if you want to belong, you have to look like this, you have to be like this,' and I just feel like this is a project where we said, 'No.'"

Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).



GenZ	0.23
Millenials	0.04
GenX	-0.14
Access	0.04
High End	0.01
Exception	0.15

	+++
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	++

COMPONENT ITEMS

- I wear fragrance to **feel powerful**
- I wear fragrance to **feel super successful**
- I take care of my appearance:
To feel empowered / in control
To be more admired by others
To be more successful in my career
- Social and professional success is my top priority
- I am:
Successful
Powerful
- I dream of being:
A social media influencer
A successful businesswoman / A woman who has a successful career
A top model / beauty queen
- When I choose a perfume brand, I prefer: **Brands created by my favourite celebrities/influencers**
- I wear fragrance BUT NOT To please someone who likes it NOR To pamper myself

INSPIRATION



SUCCESS GODDESS

Pacco Rabbane, LADY MILLION EMPIRE

"A highly impudent floral chypre from Paco Rabanne. How to **build an empire** Million style? **Her reign, her rules.** Power full. Risk it all. Never stop. Desire your destiny. Now. Criticism, ignore it. **Diamonds, lets have more.**"



BOLD LEADERSHIP

Ralph Lauren, EDP INTENSE

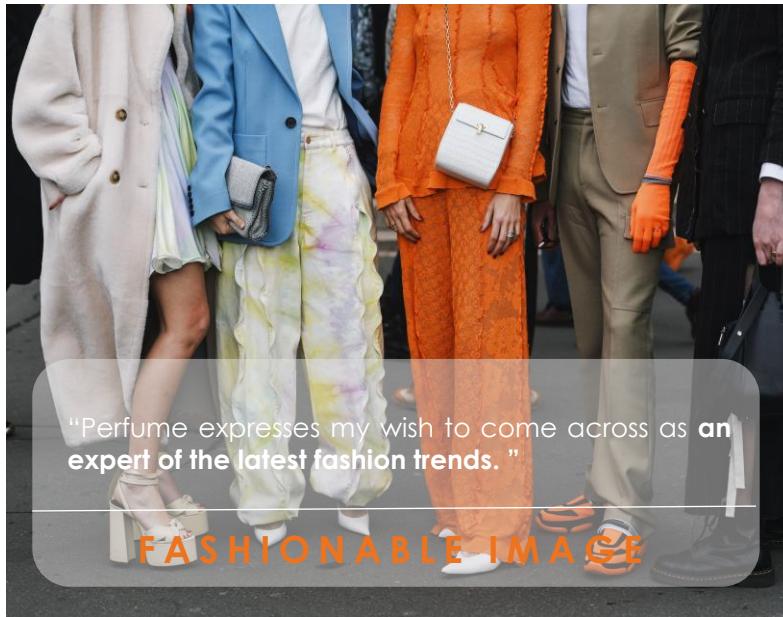
"inspired and made for women who live and **lead with intensity**", "an extremely luxurious scent for the **successful woman who does not compromise with neither herself nor her career."**



Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).

AUGMENT

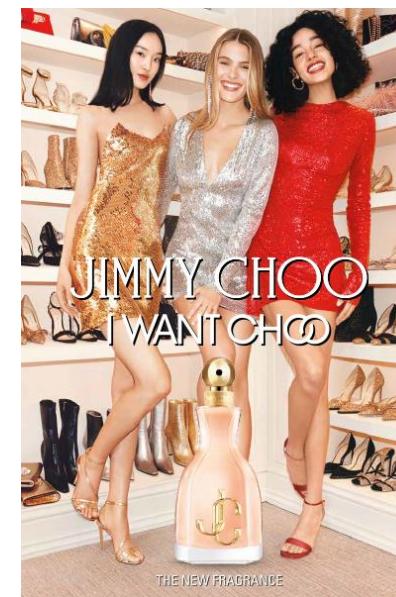


GenZ	0.08
Millenials	0.02
GenX	-0.05
Access	0.03
High End	0.02
Exception	0.04

	-

	++++

INSPIRATION



COMPONENT ITEMS

- The category which **best project the social image I wish to have:** PERFUME
- I wear fragrance to **be fashionable and trendy**
- It is very important that the perfume I wear **express youthfulness**
- I wear fragrance to **make an impression**
- I take care of my appearance:
 - To look / feel younger
 - To be more fashionable
- When I choose a perfume brand, I prefer:
 - Fashion apparel brands** (e.g., Victoria's Secret, Diesel, Calvin Klein, Guess, etc.)
 - Independent brands (Indie brands)**
- When I love a perfume's scent, I buy it even if I don't like the bottle or the brand (Strongly DISAGREE)
- I am NOT: Natural
- I wear fragrance BUT NOT To please someone who likes it NOR To feel good and have a sense of well-being NOR To feel appropriate

PLAYFUL GLAM

Jimmy Choo, I WANT CHOO

"Jimmy Choo, the **world-famous shoe brand** that many celebs like Beyoncé and Heidi Klum run off with, has released a must-have perfume: "I Want Choo" is an ode to the **playful**, confident Jimmy Choo woman (...). As with everything from Jimmy Choo, the bottle is a **true object of desire** (...). **Beauty meets fashion** in the shimmering and stunning outer-packaging. The metallic box with vivid red glitter and the golden JC monogram embodies the **glamorous soul of the Jimmy Choo universe.**"

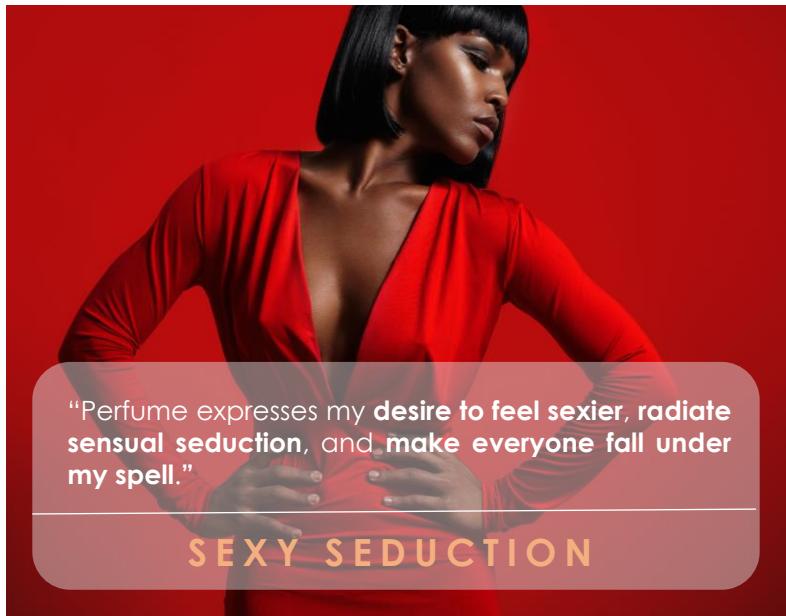


DESIGNER MUSES

Versace, DYLAN TURQUOISE

"Starring **Hailey Bieber** and **Bella Hadid**, the campaign evokes escapism and the crystal clear waters in the background are reflected in the new perfume bottle's aqua blue shades."

Embodied by Hailey Bieber, who is the face of the brand, the Dylan Turquoise imagery has a **young exuberance** to it much like the fragrance's zesty notes."



GenZ	0.11
Millenials	0.02
GenX	-0.07
Access	0.00
High End	0.02
Exception	0.09

	+++
	-

COMPONENT ITEMS

- I wear fragrance to **feel sexy/attractive to others**
- I like to wear perfumes that **highlight my sensuality**
- I wear fragrance to **please someone who likes it**
- I do regularly for my appearance and wellbeing: **Using hair mists or hair perfumes**
- I take care of my appearance to be desirable / sexy
- Seduction plays an important part in my life
- It is important to me that others recognise my femininity
- I am: Sexy
- I would like to be more: Sexy
- I dream of being: A sex symbol
- I wear fragrance BUT NOT To have a good professional image NOR To feel appropriate
- I am NOT Demure AND NOT I love scents that bring back happy childhood memories

INSPIRATION



HYPNOTIC LOVE
Louis Vuitton, SPELL ON YOU
"Imbued with sophistication and **sensuality**, Spell On You **expresses this thrilling tension of attraction as a magnetic floral composition**. Like a **love potion for the senses**, upon contact with the body the fragrance releases an enveloping, euphoric warmth."



EXTREME SENSUALITY
Jean Paul Gaultier, LA BELLE EAU DE PARFUM
"A real addictive and luminous elixir for an **ultra-sensual and feminine woman**."
"The bottle; a **dream body!** With **feminine curves**, a slim waist and a flower necklace, the La Belle bottle is an **ode to ultra-sensual femininity**."



AUGMENT



GenZ	0.09
Millenials	0.04
GenX	-0.08
Access	0.00
High End	0.01
Exception	-0.02

	+++
	+
	-

INSPIRATION



LADY BOSS

Carolina Herrera, VERY GOOD GIRL

"Fun, fabulous and fearless, Very Good Girl is a bold new interpretation of the iconic Good Girl scent. (...) In her [Carolina Herrera] own words: "I have a responsibility to the woman of today—to **make her feel confident, modern** and, above all else, beautiful."

COMPONENT ITEMS

- I wear fragrance to **feel confident**
- I wear fragrance to **have a good professional image**
- I wear fragrance to **feel appropriate**
- I take care of my appearance to feel that I "fit in"/ more self-confident
- I take care of my appearance to be more respected/ taken seriously
- I dream of being:
A self-made, wealthy woman
An entrepreneur
- I wear fragrance BUT NOT To treat myself NOR To be non-conventional, to shock people
- I am NOT Rebel NOR Unconventional

POWERFUL AURA

Dolce & Gabbana, DOLCE LILY

"Expressing the authentic and caring side of the Dolce girl, the sparkling fruity-floral fragrance embodies her **evolution to a self-confident young woman** (...). The campaign stars Deva Cassel perfectly embodies the **vibrant energy and authentic character of the Dolce girl**. She is seen soaking up the lively atmosphere of picturesque Portofino, arriving along the corniche in an open-top red convertible, and enjoying a coffee with friends in a harbourside café. Her joyful spirit and **sparkling confidence radiate in her every move**, as she takes pleasure in life's simple moments."





GenZ	0.09
Millenials	0.06
GenX	-0.11
Access	0.03
High End	0.00
Exception	0.05

	+

INSPIRATION

'THE WORLD IS OUR GARDEN'

Guerlain, ACQUA ALLEGORIA COLLECTION
Guerlain's Aqua Allegoria Gets A Sustainable Makeover
"The Aqua Allegoria fragrance collection **celebrates the wonders of the world**. Each creation pays tribute to nature's beauty and sweeps us up in a **discovery of exceptional raw ingredients and notes**, beautifully enhanced by Guerlain's perfumer-explorers.
Luminous and cheerful fragrance creations, **true odes to nature**, magnifying the exceptional flowers that compose them."



COMPONENT ITEMS

- I expect my favourite fragrances to **share my convictions on what women should fight and stand for**
- I wish perfumes could have **skin care benefits** (e.g., hydrating, anti-age, anti-oxydant)
- It is very important to me that my preferred beauty brands have a strong ethical commitment (e.g., to women's empowerment, environmental health, diversity and inclusivity, etc.)
- Using cosmetics is not eco-friendly
- I am very sensitive to how beauty brands address racial or ethnic issues
- When I choose a perfume brand, I prefer:

100% natural brands/ Certified organic brands

Vegan, cruelty-free brands

Brands with a strong sustainability commitment

Brands which offer refillable packs/bottles

- I wear fragrance BUT NOT To add a final touch, whenever I get dressed up NOR To feel super successful AND NOT When I love a perfume's scent, I buy it even if I don't like the bottle or the brand

EXPRESSION

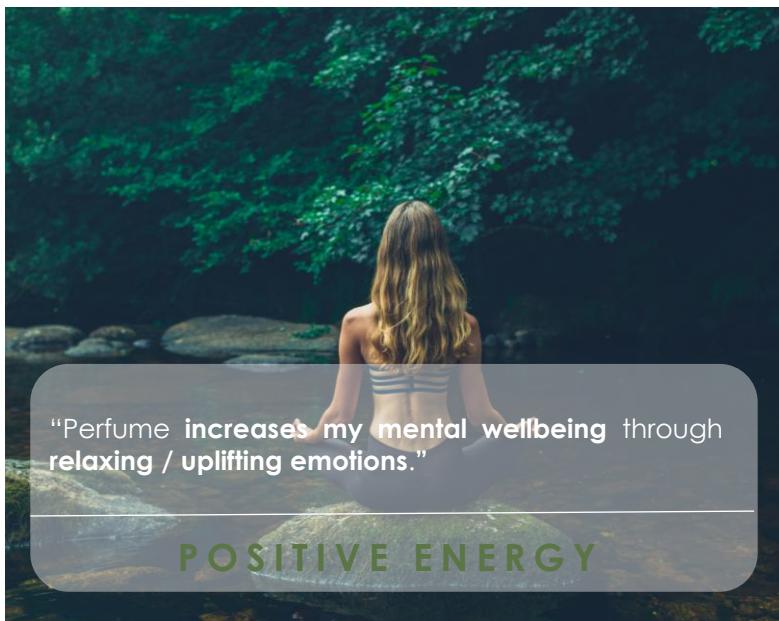


TOTAL TRANSPARENCY

Henry Rose Fragrance Collection

"We're removing the last black box in the beauty industry, and revealing our mystery." When Michelle Pfeiffer launched **Henry Rose** in 2019, it was the **first EWG-verified luxury perfume brand**. The actress discloses 100% of the collection's ingredients and uses **sustainably-sourced, recyclable materials for its bottles and packaging**. Queens & Monsters is a fresh, but sensual sent with notes of violet leaf, neroli, freesia, jasmine, vanilla, coco musk, and sandalwood.

AUGMENT



GenZ	0.03
Millennials	0.02
GenX	-0.03
Access	0.01
High End	0.00
Exception	0.07

	-
	+

INSPIRATION

COMPONENT ITEMS

- I wear fragrance to:

Feel energized, vibrant/ Boost my mood

Get the sensation I am travelling/ escaping to new worlds

Bring back memories

Relieve stress

- I am: sensitive
- When I choose a perfume brand, I prefer: **Brands which support mental health initiatives**
- I wear fragrance BUT NOT To make an impression NOR To be non-conventional to shock people NOR To pamper myself



BLISSFUL SERENITY

Marc Jacobs, DAISY SKIES

"Daisy Skies Eau De Toilette invites a **serene and balanced state of mind** (...). Inspired by the blue open sky and warm rays of sunshine, the Daisy Skies collection **captures that moment of calm** and its **intimate and serene effect on our spirit**. Perfumer Alberto Morillas wanted to re-create a spring day spent in the soothing breeze under the open skies, feeling the way the wind moves and ripples with life—almost like flowing water."

RESET AND RE-CENTER

The Nue Co, FUNCTIONAL FRAGRANCE

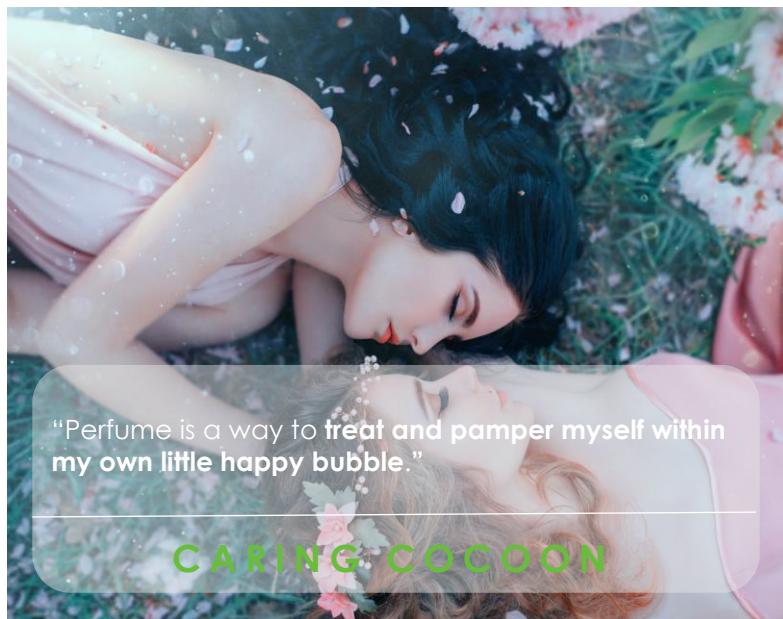
"A fragrance with a function, designed to **help you reset at times of high stress**. Developed using data insight and research into **the connection between cognitive function and the olfactory system**. This is an **anti-stress supplement delivered in the form of a unisex fragrance**. Clean, woody, spicy and smoky. When? Use daily, or at moment of high stress".



Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).

AUGMENT



GenZ	-0.10
Millennials	-0.05
GenX	0.10
Access	0.01
High End	-0.01
Exception	-0.08

	-
	++++

INSPIRATION

COMPONENT ITEMS

- I wear fragrance to:
 - Feel good and have a sense of well-being**
 - Treat myself**
 - Pamper myself**
- I take care of my appearance to:
 - Feel good about myself
 - Be happier
- When I choose a perfume brand, I prefer: **Fun brands**
- I wear fragrance BUT NOT To feel like a different person NOR To feel powerful NOR To feel fresh, clean and pure



SUMMER IN A BOTTLE

Nina Ricci, NINA SOLEIL

"Nina's iconic apple-shaped bottle adopts a sunny and **optimistic yellow shade**, seemingly having soaked up an abundance of summer rays. Its glossy finish instantly evokes an **irresistible tangy sugar glaze**. Yellow and white stripes emerge where the apple's fleshy contours appear to have been crunched; a design that also adorns the box. These charming stripes are **evocative of the parasol canvases that bedeck the shores of seaside towns each summer.**"

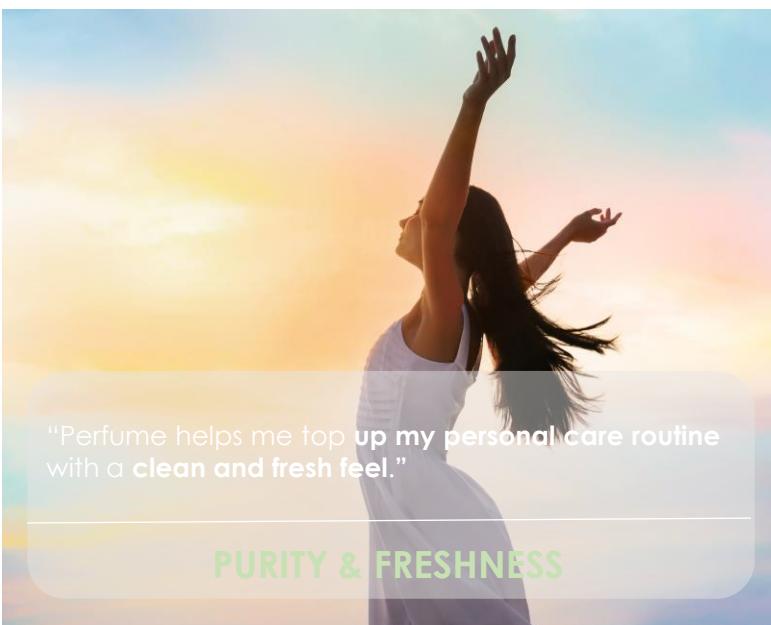


SCENTED ESCAPE

Jo Malone, BLOSSOM

"Escape to the Mediterranean with a new collection for you and your home. Inspired by a Sardinian summer. Blossom season is upon us and with it brings **a sense of optimism, hope and unadulterated joy**. At Jo Malone London we revel in the **carefree elation**, taking the opportunity to celebrate the olfactory diversity the period brings."

AUGMENT



GenZ	-0.06
Millenials	0.00
GenX	0.02
Access	-0.03
High End	-0.01
Exception	-0.16

	--

INSPIRATION

COMPONENT ITEMS

- I wear fragrance to **feel fresh, clean and pure**
- I take care of my appearance just to be clean and well-groomed
- I wear fragrance to **add a final touch, whenever I get dressed up**
- I am: natural
- When I choose a perfume brand, I prefer: **Brands which guarantee the perfect safety of their products**
- I love fragrances that smell like sweet food (e.g., candy, cake, etc.) (Strongly DISAGREE)
- I wear fragrance BUT NOT To feel like a different person NOR To feel sexy/attractive to others NOR To be fashionable and trendy NOR To feel super successful



MORNING FRESHNESS

FRESH LIFE, Eau de Parfum

"You won't underestimate the **power of a breath of fresh air** after getting a whiff of this crisp scent (...). Fresh's co-founder Liv Glazman created this fragrance as **an ode to the beauty of an early morning rise**. Fresh Life Eau de Parfum is sensual citrus fragrance that captures the ultimate Fresh moment, conjuring the **freshness of a clear blue sky**, a sparkling sun, and velvety water."



PURE & SIMPLE

Philosophy, AMAZING GRACE

Philosophy's Pure Grace is what modern simplicity dreams are made of. The **soap-and-water scent** is enhanced with notes of water lily, leafy greens, and musk for **an end product that's out-of-the-shower good**.

Green/red = significantly over/under US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 25 and 26).



GenZ	0.01
Millenials	0.02
GenX	-0.03
Access	0.01
High End	0.02
Exception	0.14

	+
	+
	-

COMPONENT ITEMS

- The category which best help me to **have fun, make enjoyable discoveries, experience new things** is: **PERFUME**
- I am **highly receptive to scents and textures**
- I **love immersive experiences** in which all senses are triggered in an unexpected way
- I love products which give me **intense sensorial experiences** as soon as I try them
- It's important to me that a brand reinvents itself and surprises me
- I wear fragrance BUT NOT To feel confident NOR To add a final touch, whenever I get dressed up NOR To be non-conventional, to shock people NOR To feel fresh, clean and pure
- PERFUME is NOT the category that helps me the most to project the social image I wish to have

INSPIRATION**WORLDS WITHIN WORLDS**

Aesop, ORTHERTOPIAS

Aesop's latest fragrances, 'Othertopias', **take inspiration from liminal spaces that challenge perceptions.**

"They (Miraceti, Karst and Erémia) are all sort of pieces of research on the **boundaries between real and imagined**. (...). They are all an homage to the work of these philosophers. They wrote a lot on the **poetic of space** and many other thinkers have worked on his **idea of space being relative to realities**, but allow us to be connected to meteorology, poetry, and have the **ability to make us travel and unlock our reverie**." French perfumer Barnabé Fillion says.

**IMMERSIVE JOURNEY**

Dior, MISS DIOR

An invitation to follow in the footsteps of the American actress Natalie Portman, muse of Miss Dior eau de parfum.

Ready Player Me on Twitter: "We partnered with Dior to launch their exclusive fragrances with an **interactive experience** where **you can create an avatar and see it come to life**, across various environments."



GenZ	0.09
Millenials	0.03
GenX	-0.07
Access	0.06
High End	0.02
Exception	0.16

	++++
	-

INSPIRATION



SCENTED HALO
Jo Malone, PERFUME + CANDLE GIFT SET

COMPONENT ITEMS

- When I particularly like a smell, I like to **enjoy it in as many ways as possible** (e.g., scented bath products, scented candles, etc.)
- I like to use **scented personal care products** (e.g., body & bath products, shampoo)
- I do regularly for my appearance and well-being:

Using home scents/ homes fragrances (e.g., scented candles, home sprays, reed diffusers)

Using essential/ scented oils

- I often buy a fragrance simply because **I love its bottle**
- I am specially attracted by objects/places that are inspired by ancient traditional style
- I wear fragrance BUT NOT To feel confident NOR To add a final touch, whenever I get dressed up NOR To have a good professional image NOR To be non-conventional, to shock people NOR To feel fresh, clean and pure



FAMILIAR FEELING

Le Labo, THE MATCHA 26

"THÉ MATCHA 26 is much more than a scent to us. It is a moment of introspection, a moment of self that offers a quiet inner celebration of grace and soulful beauty. A simple whiff takes us away from the hum of the outside and brings us back "in". Matcha tea accord is infused with a creamy fig note, grounded by soft vetiver and textural cedar woods and uplifted by enticing bitter orange. Introverted and deep by nature, THÉ MATCHA 26 is a skin scent, something meant for, and only those individuals lucky enough to be very close to, the wearer. It carries a noble stillness. To us, it is a scented reminder of home, of welcomed solitude, and of all things familiar and treasured."



GenZ	0.15
Millennials	0.06
GenX	-0.13
Access	0.04
High End	0.02
Exception	0.10

	--
	--
	++

INSPIRATION



I KNOW WHAT YOU DID LAST SUMMER

Louis Vuitton ON THE BEACH
The brand's fifth unisex fragrance in its Parfums de Cologne line boasts a light blend perfect for carefree summer days. "The ecstasy of the sun, the rhythm of the sea and the gentle warmth of sand on the skin -- Packaged in a gradient bottle reminiscent of the evening sky, the fragrance takes inspiration from sensorial experiences that involve soft and warm sand, calm waves and the pleasant memory of a day at the beach. With citron serving as the key scent, the blend features neroli, as well as subtle hints of thyme, rosemary and pink pepper. The product is rounded out with a touch of cypress to replicate the feeling of a tree's shade."



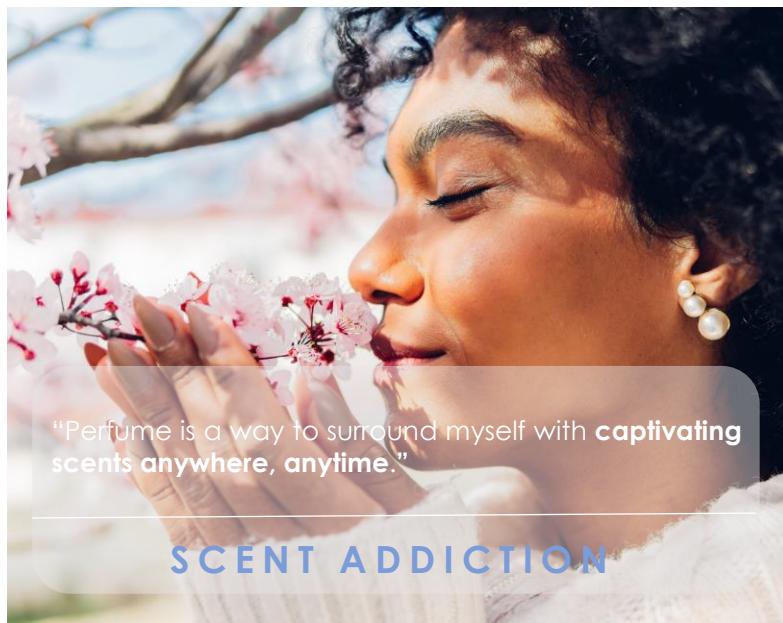
SMELLS LIKE TEEN SPIRIT

White Rabbit x Scent Library (China)

"The iconic candy brand White Rabbit, which is no stranger to nostalgia marketing, converted its sweet-milky flavor to perfume in its collaboration with Scent Library, which is a Chinese retailer that focuses on niche fragrances. In response to this collaboration, netizens responded with great enthusiasm. "My favorite, White Rabbit, finally has perfume," said one user excitedly. "I am so happy. [It's] the best memory in my childhood." (jingdaily.com)

- I love fragrances that **smell like sweet food** (e.g., candy, cake, etc.)
- I love scents that **bring back happy childhood memories**
- I wish there were **makeup products that smell like my favourite perfume**
- I wear fragrance BUT NOT To feel confident NOR To feel sexy/attractive to others NOR To add a final touch, whenever I get dressed up NOR To feel fresh, clean and pure

AUGMENT



GenZ	0.11
Millenials	-0.03
GenX	-0.01
Access	0.02
High End	0.01
Exception	0.06

	++++
	+++
	--

INSPIRATION

COMPONENT ITEMS

- I pay a lot of attention to the **smell or perfume of things around me**
- When I particularly like a smell, I like to **enjoy it in as many ways as possible** (e.g., scented bath products, scented candles, etc.)
- When I **love a perfume's scent**, I buy it even if I don't like the bottle or the brand
- I often buy a fragrance simply because I love its bottle (Strongly DISAGREE)
- I wear fragrance BUT NOT To be fashionable and trendy NOR To feel appropriate



WRAP ME UP

Ellis Brooklyn, SUPER AMBER

"Ever imagined **perfume as a texture**? Meet SUPER AMBER, a cozy, super warm, **addictive scent that envelops like a cashmere blanket on warm bare skin** (...). Unlike traditional fragrances, SUPER AMBER is not structured with top, middle and base notes. **Rather it blooms once it interacts with your skin's own unique chemistry**. It's unlike any perfume you've smelled."



MY VERY OWN SCENT

Glossier, YOU

"Nothing has defined that concept more than their Eau de parfum, Glossier You, which has been described by the company as an "**addictive musk scent that adapts to your unique skin chemistry**," meaning it's literally a musky, sultry, woodsy version of yourself. **The scent is designed to be lived in.**"

"It's not one of those perfumes you wear to become someone else. Mostly, **it smells like you: soft, warm, familiar.**" says the brand.

PERFUME KEY NEEDS
DETAILED RESULTS



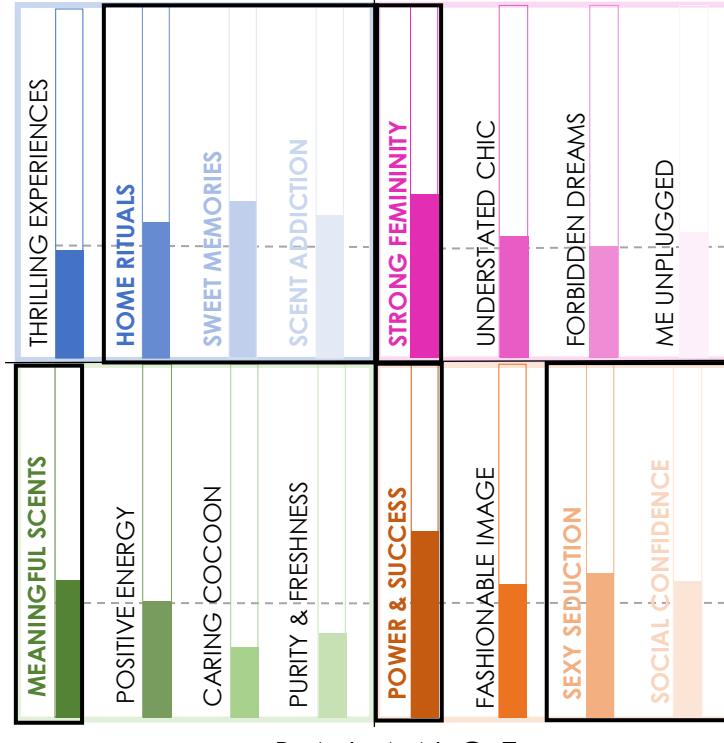


WORLD - GENERATIONS

OVERREPRESENTATIONS IN BOLD

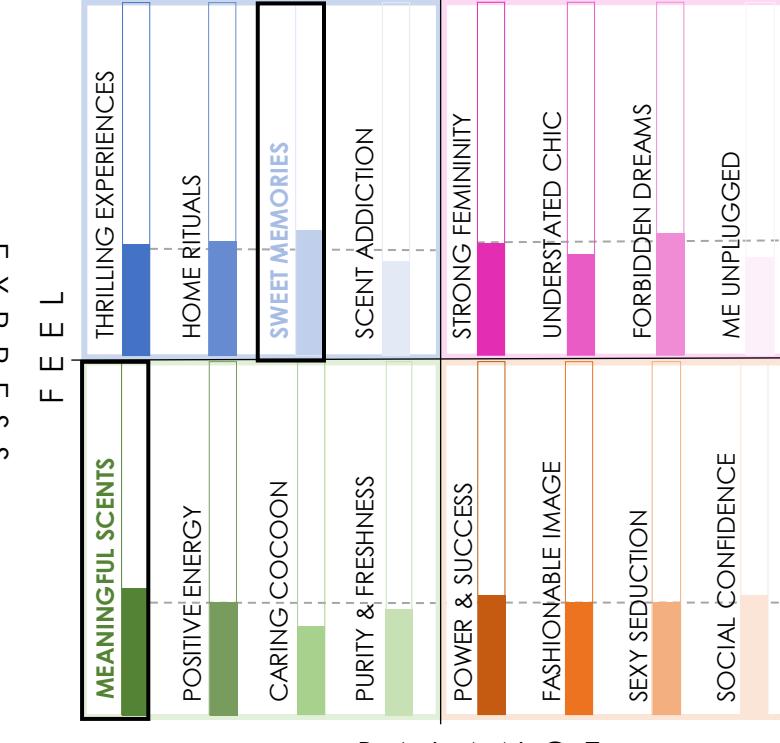
GEN Z
(15-25 yo)

A U G M E N T



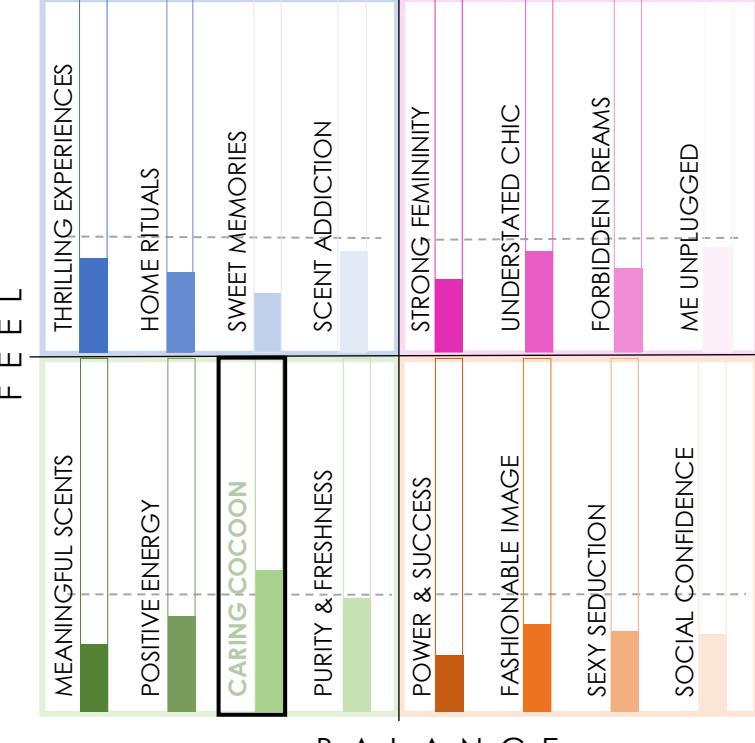
MILLENNIALS
(26-39 yo)

A U G M E N T



GEN X
(40-54 yo)

A U G M E N T



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

In bold = significantly over US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

C1 - Internal use

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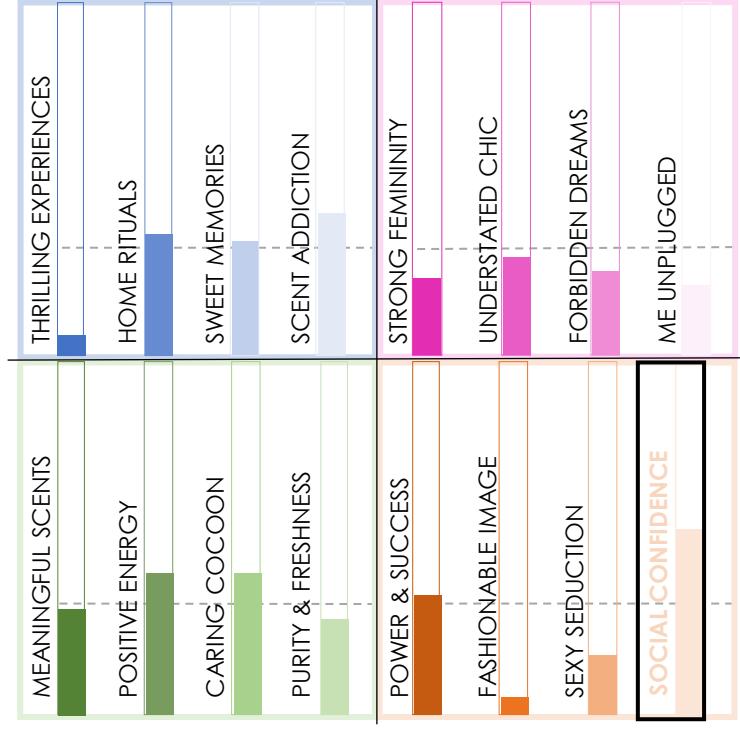


USA - GENERATIONS

OVERREPRESENTATIONS IN BOLD

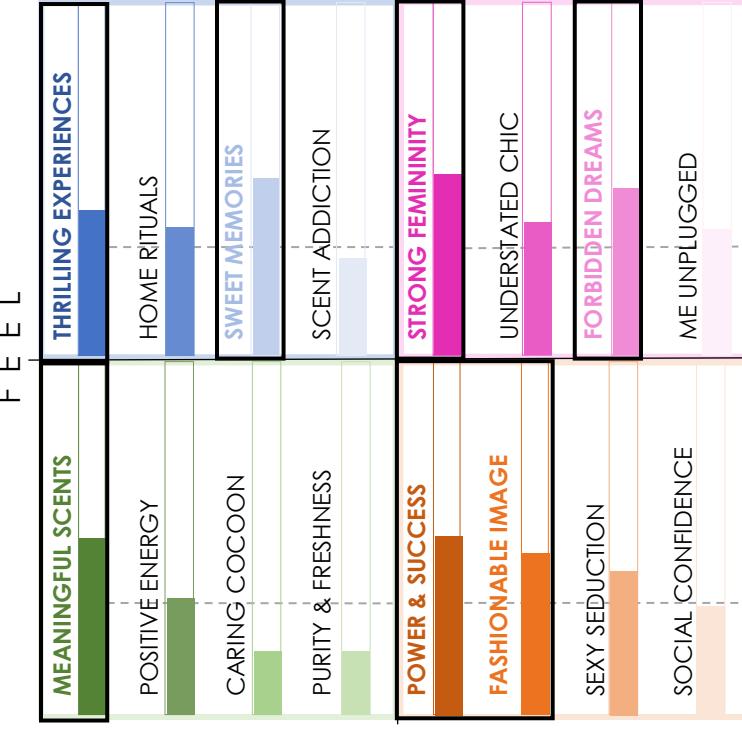
GEN Z
(15-25 yo)

A U G M E N T



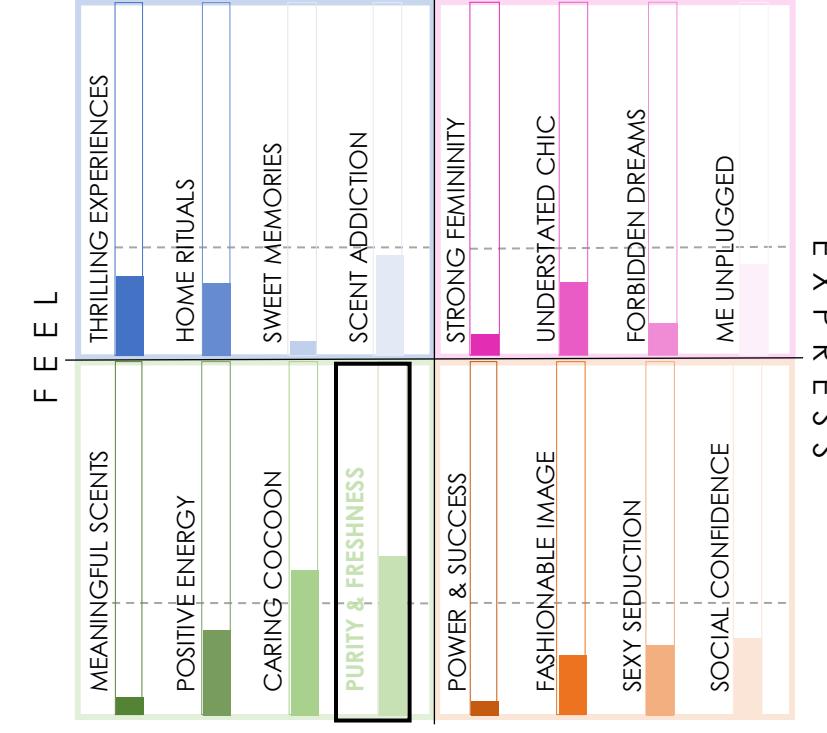
MILLENNIALS
(26-39 yo)

A U G M E N T



GEN X
(40-54 yo)

A U G M E N T



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 93 | Millennials 410 | Gen X 334

In bold = significantly over US standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

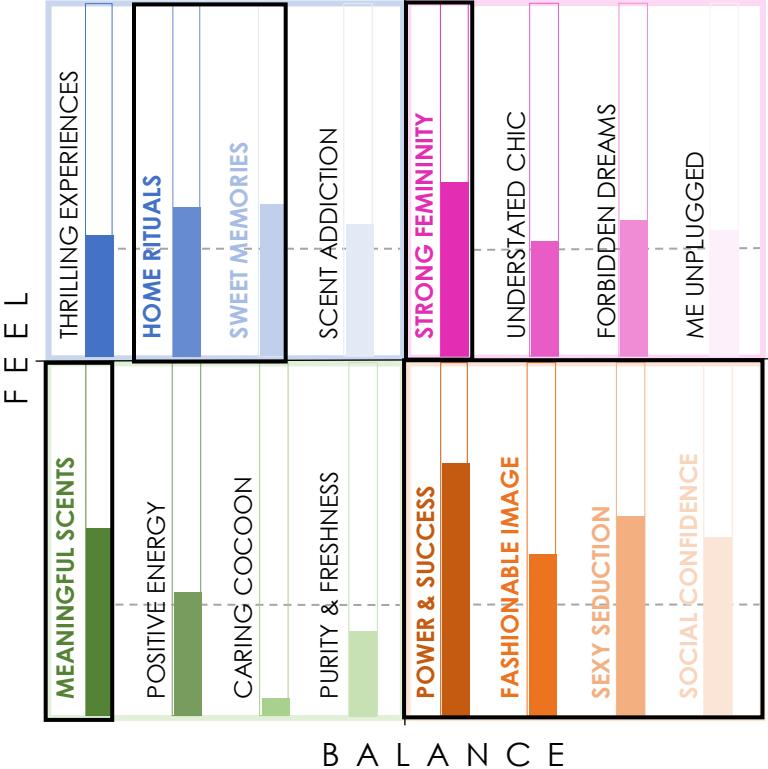


EU5 – GENERATIONS

OVERREPRESENTATIONS IN BOLD

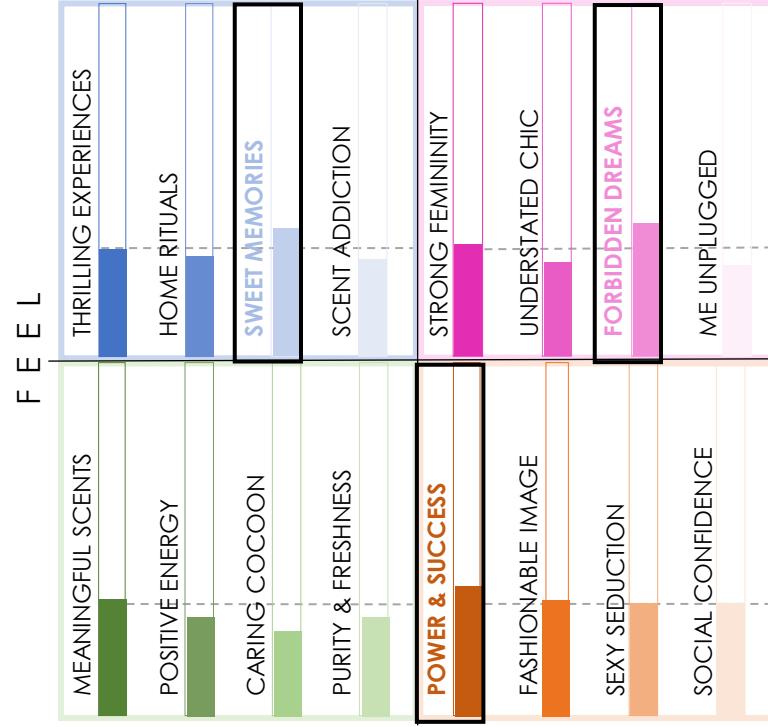
GEN Z
(15-25 yo)

A U G M E N T



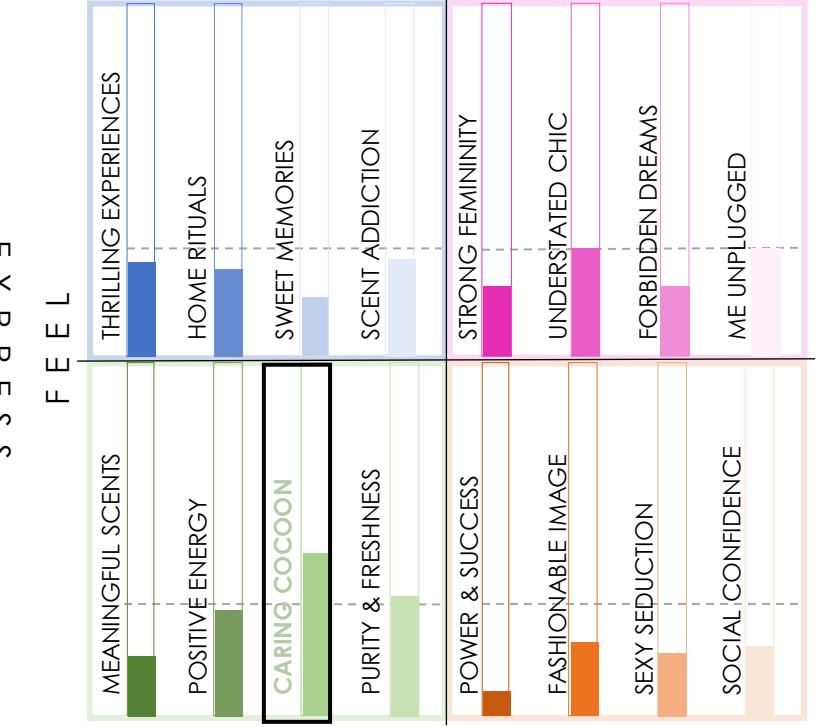
MILLENNIALS
(26-39 yo)

A U G M E N T



GEN X
(40-54 yo)

A U G M E N T



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 278 | Millennials 595 | Gen X 705

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

In bold = significantly over EU5 standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

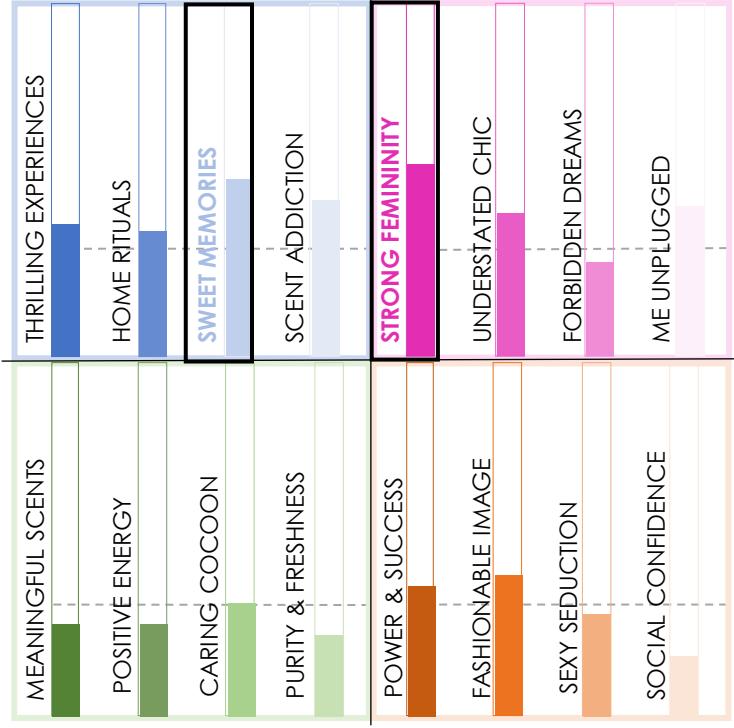


CHINA – GENERATIONS

OVERREPRESENTATIONS IN BOLD

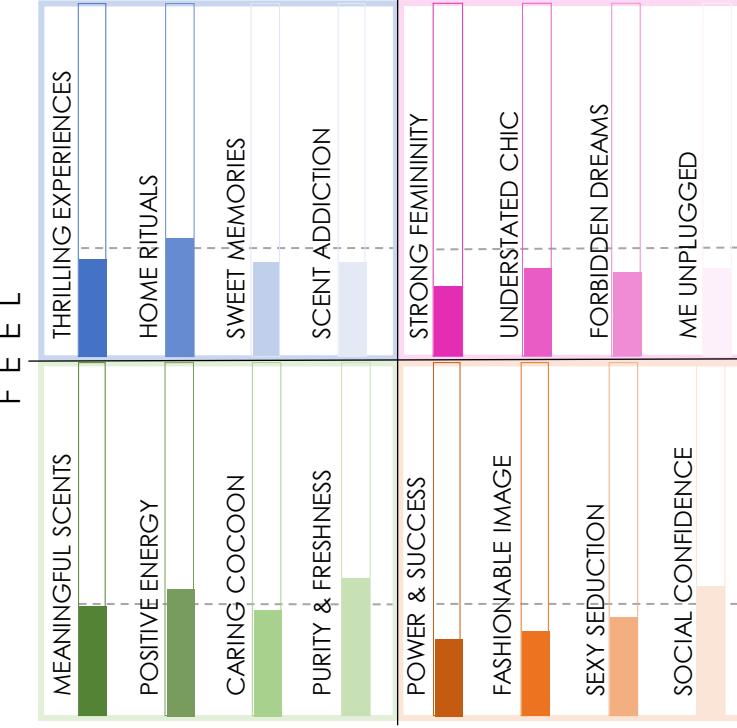
GEN Z
(15-25 yo)

A U G M E N T



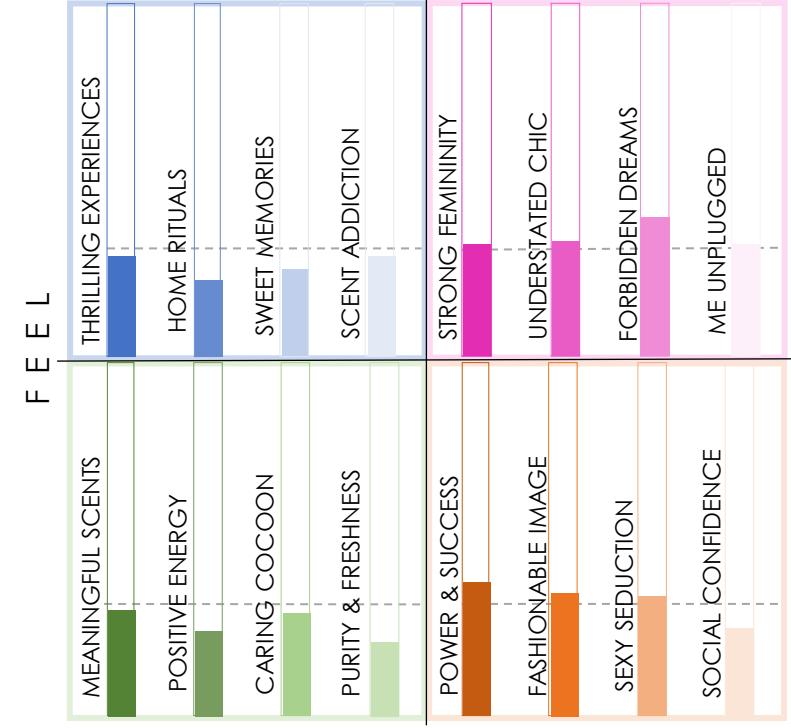
MILLENNIALS
(26-39 yo)

A U G M E N T



GEN X
(40-54 yo)

A U G M E N T



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 160 | Millennials 524 | Gen X 378

In bold = significantly over CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

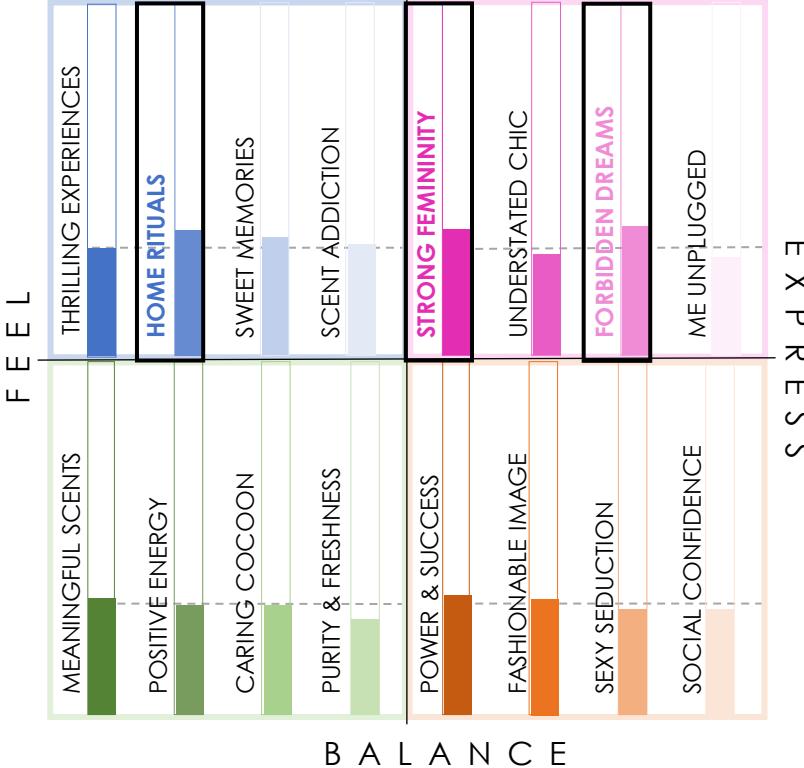


WORLD – PERFUME CLASSIFICATIONS

OVERREPRESENTATIONS IN BOLD

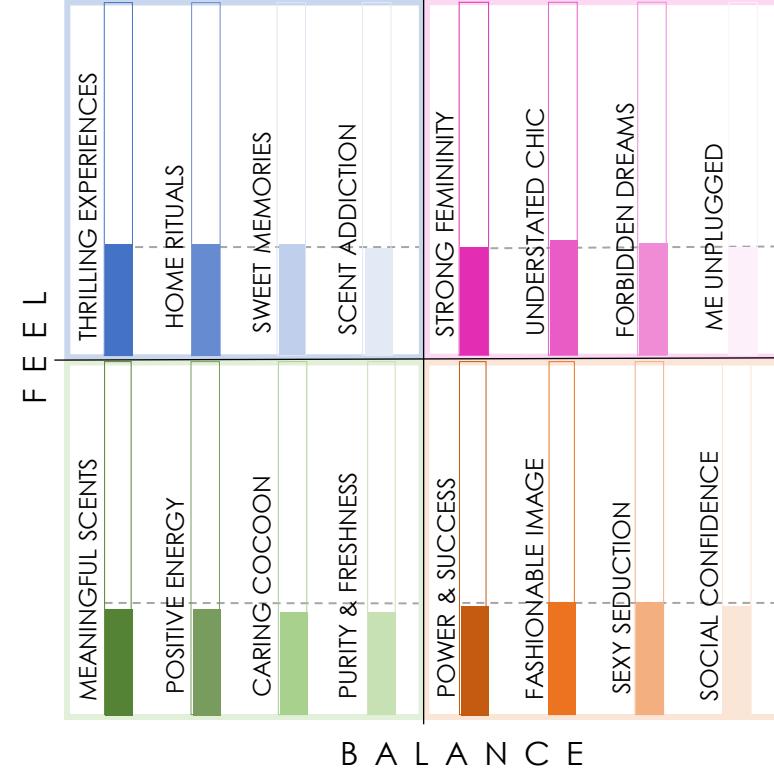
ACCESS

A U G M E N T



HIGH END

A U G M E N T



EXCEPTION

A U G M E N T



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 1,814 | High End 3,429 | Exception 749

In bold = significantly over US+EU5+CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

C1 - Internal use

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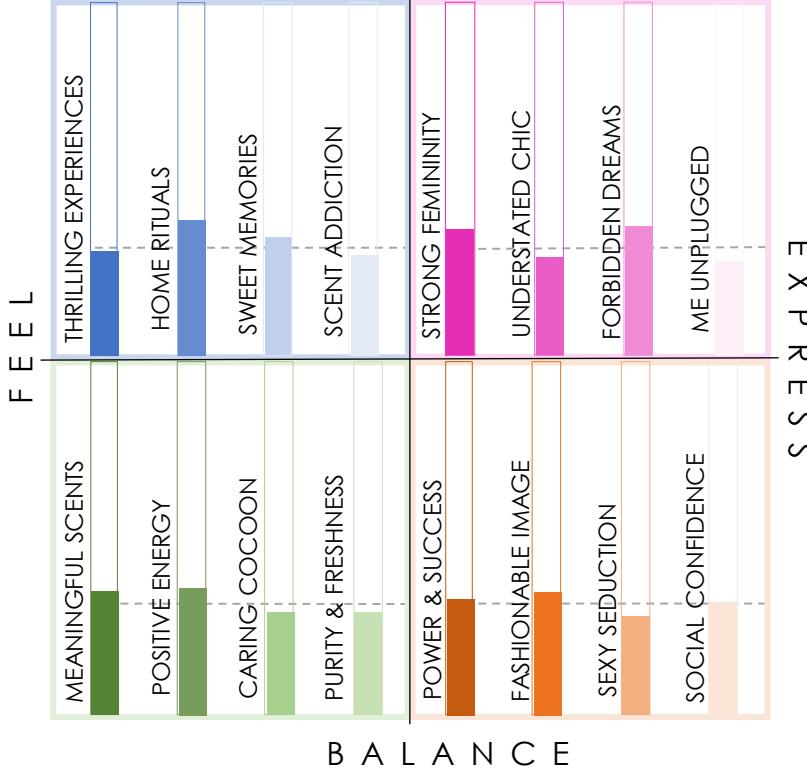


USA – PERFUME CLASSIFICATIONS

OVERREPRESENTATIONS IN BOLD

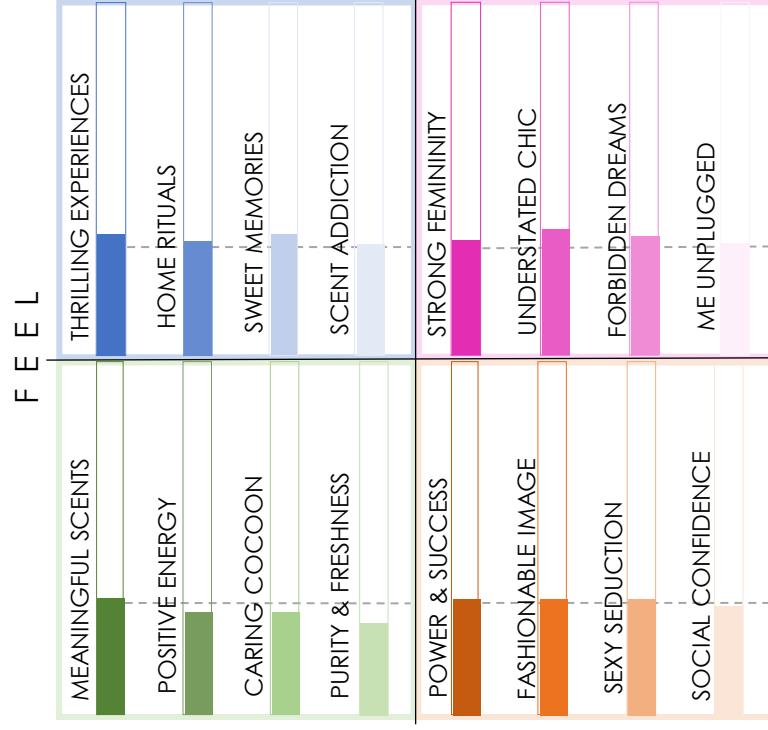
ACCESS

AUGMENT



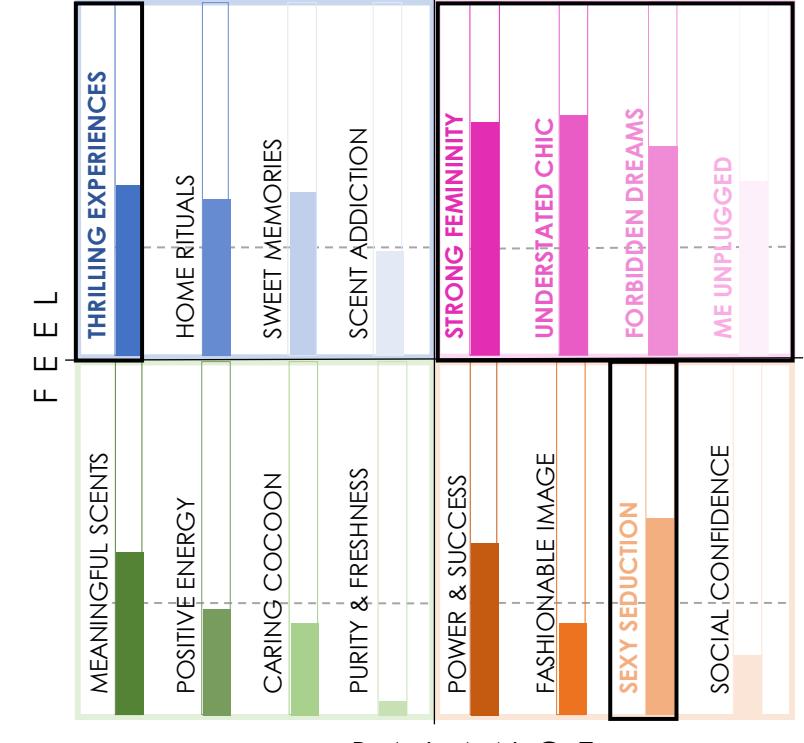
HIGH END

AUGMENT



EXCEPTION

AUGMENT



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 493 | High End 725 | Exception 121

In bold = significantly over US standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

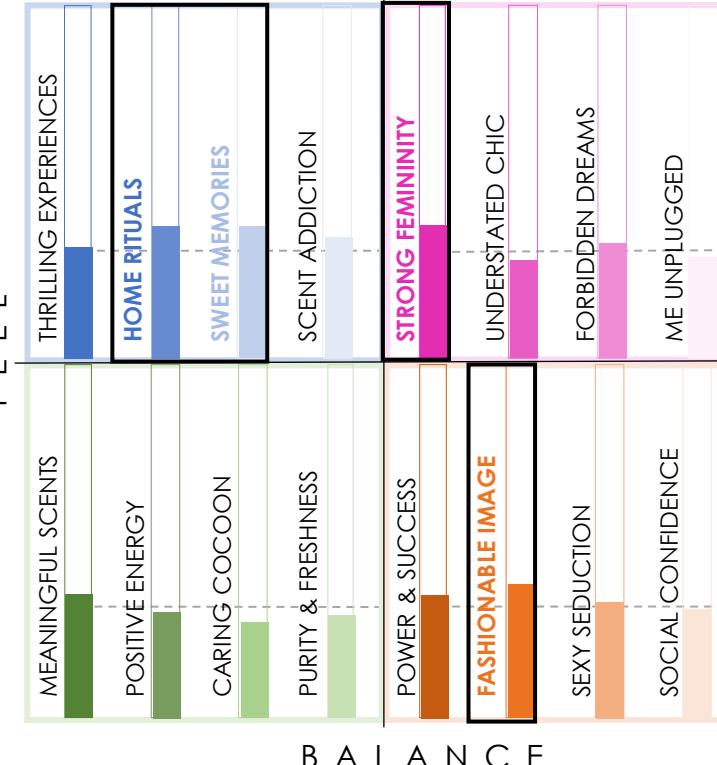


EU5 – PERFUME CLASSIFICATIONS

OVERREPRESENTATIONS IN BOLD

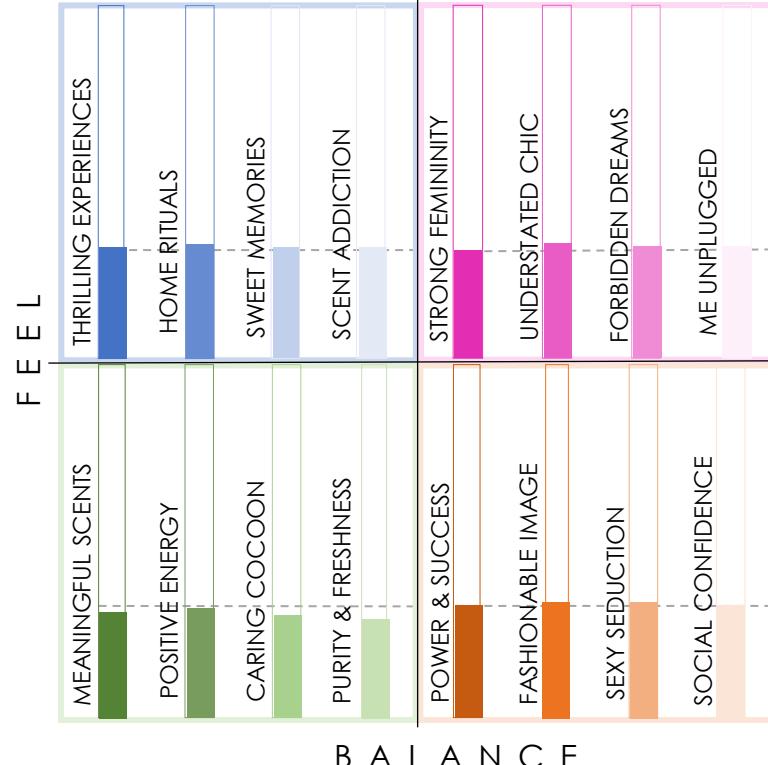
ACCESS

AUGMENT



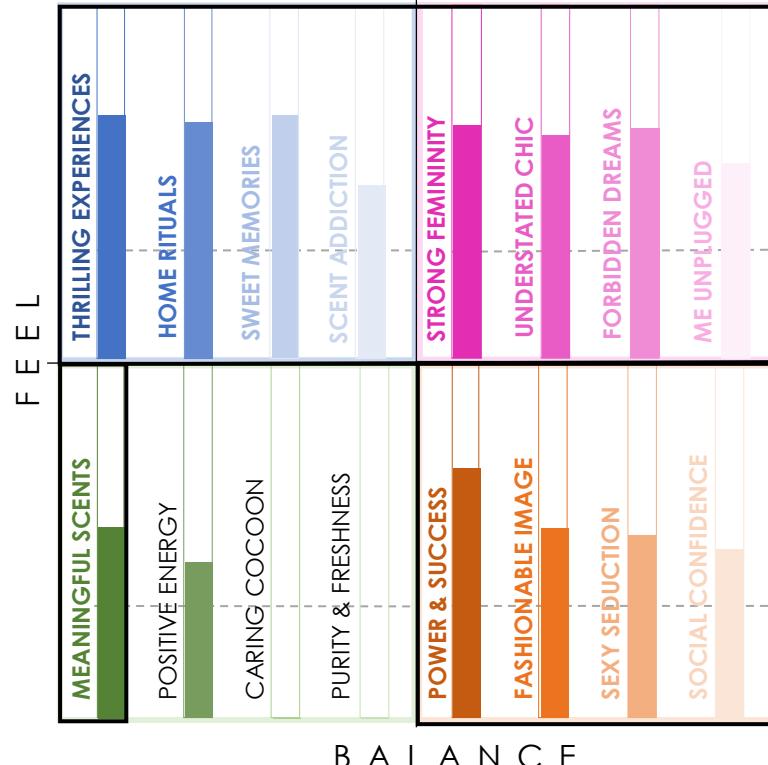
HIGH END

AUGMENT



EXCEPTION

AUGMENT



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 835 | High End 1373 | Exception 159

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

In bold = significantly over EU5 standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).

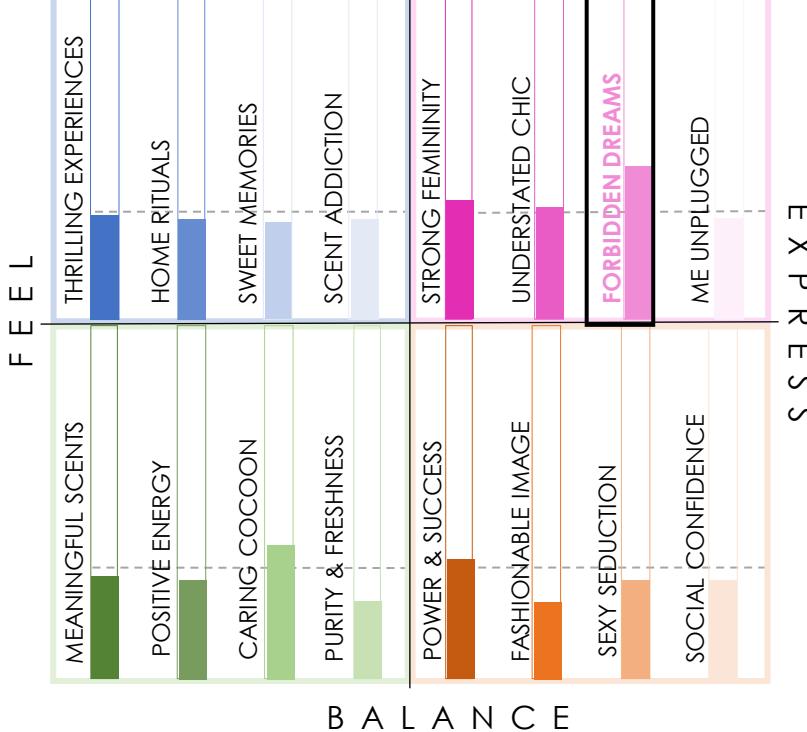


CHINA – PERFUME CLASSIFICATIONS

OVERREPRESENTATIONS IN BOLD

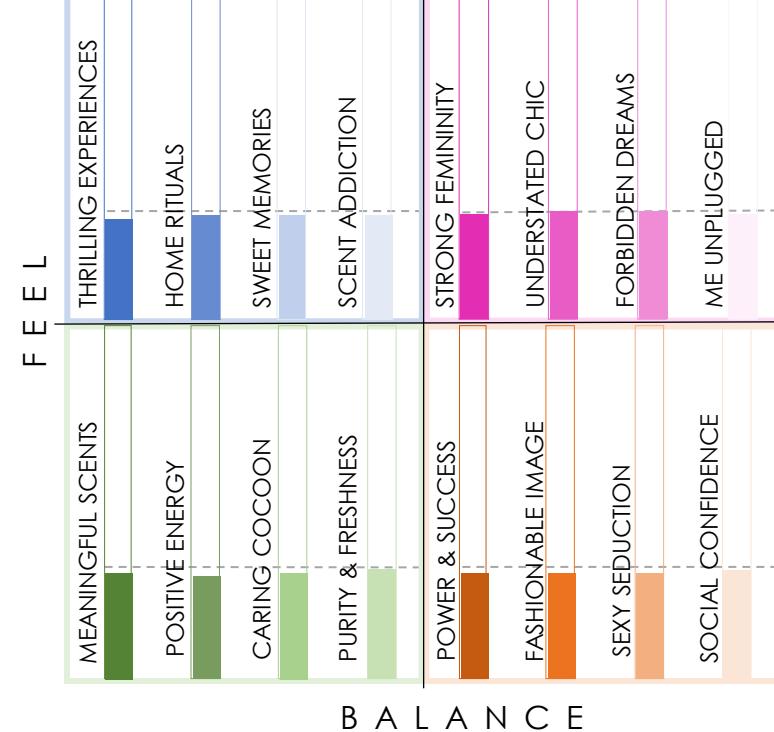
ACCESS

AUGMENT



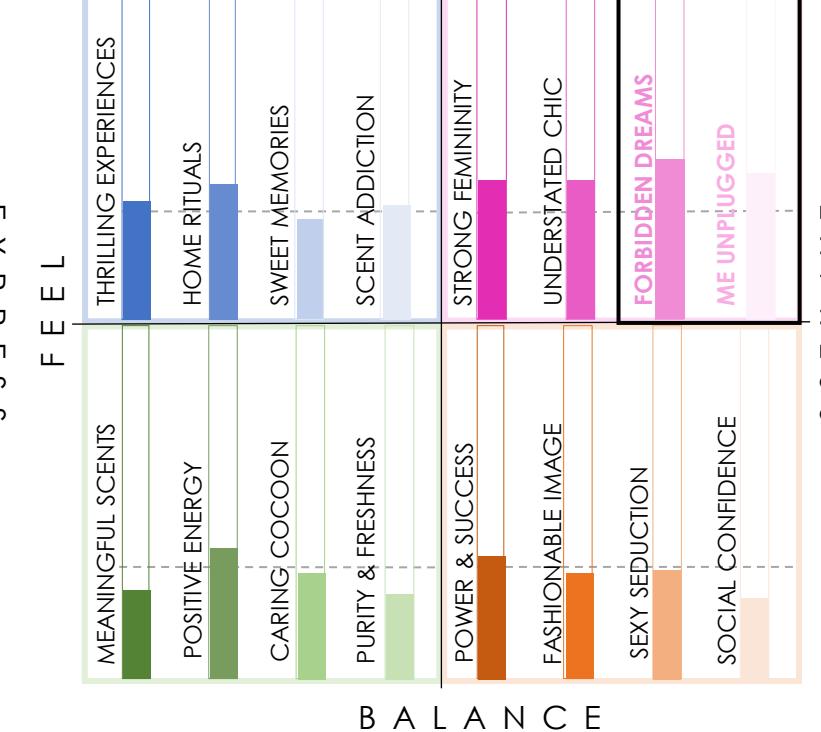
HIGH END

AUGMENT



EXCEPTION

AUGMENT



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 384 | High End 1033 | Exception 360

In bold = significantly over CN standardized score (mean 0/standard deviation 1) (statistical reliability at least 95%).

Please refer to the methodology (slides 23 and 24).