Consumer Segmentation: Segment Summaries & Overall Market Dynamics

Fact or fiction: Deconstructing myths about the female fragrance consumer

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Research Specifications

The following reflects GfK’s research specifications:

**Methodology**
- Self-administered Internet survey
- Internet interviewing among online panelists, 25 minute survey
- Utilize GfK’s nationally representative KnowledgePanel calibrated with opt-in panels

**Qualifications**
- Used perfume, body mist, scented body lotion or essential oil for special occasions or more often AND be open to using perfume
- Fragrance types described to respondents as:
  - Perfume/eau de parfum/eau de toilette
  - Body spray (lower concentration of scent in a mist bottle)
  - Scented body lotion (usually a stronger scent, purchased specifically to be a fragrance on the body)
  - Essential oil used as fragrance on the body

**Sample**
- N=1,975 total sample
  1. N=1,869 perfume users
  2. N=1,566 body mist users
  3. N=1,702 scented body lotion users
  4. N=1,077 essential oil users
- Women are age 16-65 years old
- Includes representative sample of Hispanics, both English and Spanish speaking

**How to Read**
- Data/charts in grey is the total sample
- Data/charts in segment colors are for that segment
- **↑↓** indicates significant differences from the total sample at 95% confidence
- For MRI data, the segment percent is shown, and the index is compared to the total of all segments
Common Themes
Common Themes

**Love (and use) of fragrance is defined by attitude, not age**

- What really differentiates the segments are attitudes. While there are small skews, younger and older consumers are found in every segment. There may be opportunity to talk to women based on their attitudes, not their demographics.

**Mass and Prestige shoppers are the same woman, and she shops across channels**

- Across most segments, women wear and buy a variety of forms. And they’re buying both mass and prestige. Generally they shop online, and they shop offline. They aren’t exclusive.

**She buys fragrance as a treat for herself**

- Most segments are mostly inwardly directed – she’s motivated to wear and buy fragrance for herself, not directly to be appealing to others. It’s about how it makes her feel – to lift her mood or as a treat. Is that what the industry communicates to her?
Common Themes, continued

She wants a long-lasting fragrance that’s also suitable for work

- Many of the segments desire long-lasting fragrance, but they also are looking for fragrance that’s more suitable for work (though these needs vary in degrees by segment). These are potentially opportunity spaces for innovation.

Latinas are a strong target, and there are two key segments with strong Latina representation

- In general fragrance is more important to them and they started using at a younger age. They like to shop for it and are more likely buying in department stores. One reason they don’t use more is because they forget to put it on. Are you talking to them and remind them to use?
Segment Summaries
Meet the Segments…

- Fragrance Fanatics
- Status Seekers
- Store Explorers
- Social Accessorizers
- Fringe Fragrancers
- Uninvolved Occasional
I LOVE fragrance— I’m an self-proclaimed expert and like to share my expertise with others. I started wearing perfume as a pre-teen and now wear all types very frequently. I have a signature scent, but also like to experiment and match my scent to my mood or the occasion. I layer scents to create a lasting scent and buy fragrances that come from a collection. My fragrance usage has increased over time and I expect it to continue to increase.

**Demographics**
- Less likely to be Caucasian (46% vs. 59%) and more likely to be Hispanic (33% vs. 19%).
- Less likely to live in the Midwest (12% vs. 21%).

<table>
<thead>
<tr>
<th>Age Started Using*</th>
<th>Beauty Routine and Fragrance*</th>
<th>Occasions Use by Fragrance*</th>
<th>Change In Fragrance Usage*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Segment higher than average on...</td>
<td>Segment tips toward:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work, school, casual dining, party/special event, time at home, romantic evening</td>
<td>Total Fragrance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School, casual dining, time at home, gym, before bed, romantic evening</td>
<td>Increased</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Running errands, gym, before bed</td>
<td>Increased</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Party/special event, gym, romantic evening</td>
<td>Increased</td>
</tr>
</tbody>
</table>

**Fragrance Usage**
- Total 99%↑
- Daily 58%↑ Weekly 93%↑
- 4.5↑ 3.8↑ 3.6↑ 2.5

**Avg. # Bottles Own**
- Total

**Brand Usage (unaided)**

<table>
<thead>
<tr>
<th>Most mentioned brands</th>
<th>Value of segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath &amp; Body Works</td>
<td>29%</td>
</tr>
<tr>
<td>Victoria’s Secret</td>
<td>26%</td>
</tr>
<tr>
<td>CHANEL</td>
<td>20%↑</td>
</tr>
<tr>
<td>Calvin Klein</td>
<td>15%</td>
</tr>
<tr>
<td>ESTÉE LAUDER</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Change In Fragrance Usage**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Past</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume</td>
<td>Increased</td>
<td>Increased</td>
</tr>
<tr>
<td>Body lotion</td>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Body Mist</td>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Essential oil</td>
<td>Increased</td>
<td>Increase</td>
</tr>
</tbody>
</table>
Few favorites that are always a part of my collection
I enjoy receiving the brand I use as a gift
Where I buy doesn’t matter, as long as it’s a good brand
I like to experiment with different fragrances
I have a signature scent -- it’s part of who I am
Use same fragrance in diff. forms to create a lasting scent
I match my fragrance to my mood

Also higher on...
• I choose a fragrance based on the occasion
• I like using fragrances that come from a fragrance collection
• I enjoy receiving fragrances as a gift regardless of the scent
• I want to know more about ingredients in fragrances 61%
• I prefer to buy fragrances that have been around a long time
• It’s more realistic for me to have a designer fragrance brand than designer clothing or other accessories
• Most of the time I buy fragrances on impulse when out shopping for other things

Top Reasons Wear Fragrance (T3B)
Makes me feel fresh - 96%↑ (80%)
To lift my mood - 92%↑ (71%)
To express my individuality - 88%↑ (64%)
Makes me feel sophisticated - 85%↑ (55%)
Good memories associated - 82%↑ (60%)

Skews toward...
Both

I want fragrance to make me feel...(Ranked 1 or 2)
Fresh – 29%↓ (38%) Confident – 26% (26%) Happy – Sexy – 26% (22%) Elegant – 26%↑ (18%) Provocative – 10%↑ (3%)

Leading Edge Consumers:
T3B agree that “I really don’t pay much attention to fragrances, it is just not that important to me”: 1% ↓ (33%)

Most Important Fragrance Needs (T2B)
It lasts all day 76%↑ (64%)
It is high quality fragrance 69%↑ (50%)
It is acceptable to wear at work 62%↑ (44%)
It is good for sensitive skin 50% (41%)
I am familiar with many different types of scents used in fragrances 53%↑ (34%)

Appropriate to Wear (T2B)
Party/special event – 95%↑ (88%)
Dining out – 92%↑ (81%)
At work – 82%↑ (66%)
Loved ones at home – 82%↑ (64%)
At school – 66% (58%)

Fragrance Importance
Ranked 1/2 in importance compared to other beauty categories: 15% (16%)

Top Fragrance Attitudes (T3B)
Perfume Non-perfume

Size of segment
9%

Value of segment
24%
**Fragrance Shopping Statement Agreement (T3B)**

- Good value for the money is important to me: 92%↑
- The places I shop for fragrance carry the brands I want: 91%↑
- I like to get fragrance samples when in-store: 93%↑
- I like to go to stores to try new fragrances: 95%↑
- The store that I buy fragrance from is important to me: 63%↑
- The fragrance shopping experience is overwhelming: 21%↓
- I buy fragrances online: 60%↑
- I use the internet to narrow down, then buy in store: 56%↑

**Fragrance Shopping Behaviors**

**Purchase Channel (P6M)**
- In person (at a store): 90%↑ (68%)
- Online: 50%↑ (23%)

**More likely to shop at…**
- Beauty specialty
- Brand specialty
- High end dept.
- Mainstream dept.
- Discount dept.

**Advice/Information on Purchases**
- Friend/family member: 49%↑ (36%)
- Store sales person: 35%↑ (24%)
- Brands that I like/follow: 38%↑ (23%)
- My favorite magazines: 40%↑ (18%)
- Significant other/partner: 17% (14%)

**Most Influential to Purchase (P6M)**
- Sample fragrance: 75%↑ (48%)
- Free trial bottle: 49%↑ (39%)
- Free gift w/ purch offer: 38%↑ (26%)
- In-store displays: 39%↑ (24%)
- Ad w/ scent strip: 41%↑ (23%)

**Gifting Fragrance**

- Received Fragrance as a gift (% Yes)
  - 77%↑
  - 54%↑
  - 58%↑
  - 19%

**Fragrance Gifted Attitudes (T3B)**
- This segment is more likely to receive fragrance as gift as long as it’s a brand she uses (73%↑ vs. 59%) and enjoy receiving fragrance as a gift, regardless of the scent (66%↑ vs. 45%). They’re less likely to agree that fragrances are too personal to receive as gifts (14%↓ vs. 31%).

**Buying Styles (MRI) – where over-index**

- **Buyers of the Best** (quality matters; brand loyalty; comfortable w/ technology)
  - Index = 160 (22%)
- **Swayable Shopaholics** (shop because they want to; want emotional payoff from act of buying; impulse; pay extra for image)
  - Index = 119 (43%)
Top Triggers for Using Perfume More Often

- My spouse/partner doesn’t like it (1% vs. 4%)
- If it was less expensive (84% vs. 75%),
- If the scent lasted longer (77% vs. 64%),
- If I could control the strength of the scent (71% vs. 60%),
- If the quality for the price could be trusted (72% vs. 59%).
- They are higher than total on nearly all triggers.

Top Barriers to Using Perfume More Often

- Less likely to say:
  - My spouse/partner doesn’t like it (1% vs. 4%)

Interest in Online Tools (T2B)

- Suggestions based on what I already know I like: 75%↑
- Personality quiz recommending fragrances: 68%↑
- User reviews: 62%↑
- Live chat feature to act as an advisor: 28%↑

Need Gap

They are significantly higher vs. total on most importance and satisfaction metrics:

- None for this segment

Satisfaction (Very satisfied/Satisfied with how well current fragrance options meet these needs)
General Style Attitudes (T3B)

I have different looks depending on my mood/occasion: 86%
I dress with a sense of individual style: 86%
I enjoy shopping for fun, whether I buy something or not: 93%
More willing to purchase things if I can customize it: 74%
I make an effort to feel sexy: 81%
Buy more fashion items online than a year ago: 68%
More likely to buy a product designed by a celebrity: 29%

Fashion & Style Attitudes Segment (MRI) – where over-index

Fashion First (wear brands to impress people; trendsetters and followers; prefer designers and celebrity-endorsed, rely on magazines; not afraid to go over budget)
Index = 165 (16%)

Fashionable on a Budget (believe in power of fashion but careful in how they indulge on designer labels and trends; brands are important, loyalty limited to a few lines; buy new clothes for the season; do not like to overspend)
Index = 137 (12%)

Digital / Advertising Attitudes (MRI)

Very/somewhat important to use social networking for...
To find out about products and services – 43% (129)
To rate or review a product or service – 27% (122)
To show support for my favorite companies or brands – 32% (132)
To receive exclusive offers, coupons or other discounts – 41% (122)
To gain access to VIP or Members-Only events – 24% (133)

Other Interests (MRI)

Played video games in last 30 days – 31% (108)
Regular exercise (2+ times/wk) at a club – 19% (122)
Wrote in an online blog (past 30 days) – 4% (147)
Car type most associate with: Green & Trendy – 27% (109)
Watched a TV program online – 22% (115)
Wrote an online blog - 4% (147)
Read or looked into a digital, not printed, edition of at least one magazine - 10% (135)
Magazine Groups: Net Audience – Conde Nast package – 33% (115)

Other Interests (MRI) – where over-index

Websites visited
- Google+ - 26% (128)
- Instagram - 37% (120)
- Yelp - 11% (141)
- MSN Entertainment - 4% (164)
- USA Today - 8% (128)
- abc News - 11% (150)
- eHow - 10% (146)
- Yahoo! Answers - 11% (135)

Personal behavior towards fragrance (T3B)
- When it comes to fragrances I'm an expert (47%↑ vs. 17%)
- People often ask my opinions about what fragrance they should buy/use (68%↑ vs. 22%)
- I am very active online and often text or blog about experiences I have with products in the fragrance category (33%↑ vs. 14%)

Expertise and Knowledge in…
- Beauty (60%↑ vs. 37%)
- Fashion – Clothes (63%↑ vs. 33%)
- Fashion – Shoes (52%↑ vs. 31%)
- Shopping (75%↑ vs. 42%)
- Healthy Lifestyle (60%↑ vs. 37%)
- Products for Babies or Children (40%↑ vs. 30%)

↑↓ Indicates sig. higher/lower than total at 95% confidence

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Fragrance is a must-have for me, especially perfume and essential oils (I’m a super heavy/heavy user). Status is important and I like to be the center of attention. Fragrance makes me feel fashionable; it allows me to affordably wear designer brands. I like small bottles and to mix scents and forms. The internet is my go-to place for shopping, learning what my favorite celebs like, and reviewing/rating products.

### Demographics
- Younger on average (36.18 vs. 40.37)
- Less likely to be Caucasian (47% vs. 59%) and more likely to be African American (20% vs. 13%)
- Lower average HH income (67K vs. 78K)

### Fragrance Usage*

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume</td>
<td>97%↑</td>
<td>44%↑</td>
<td>81%↑</td>
</tr>
<tr>
<td>Body lotion</td>
<td>89%↑</td>
<td>44%↑</td>
<td>80%↑</td>
</tr>
<tr>
<td>Body Mist</td>
<td>89%↑</td>
<td>41%↑</td>
<td>74%↑</td>
</tr>
<tr>
<td>Essential oil</td>
<td>69%↑</td>
<td>23%↑</td>
<td>53%↑</td>
</tr>
</tbody>
</table>

### Beauty Routine and Fragrance*
- Perfume (9%↑ vs. 5%) users are more likely to start using in their 30's.
- Essential oil users are more likely to apply fragrance as part of their regular beauty routine (30%↑ vs. 21%)
- Essential oil is far less likely to be an after-thought (35%↓ vs. 48%)

### Occasions Use by Fragrance*

<table>
<thead>
<tr>
<th>Segment higher than average on...</th>
<th>Segment lower than average on...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gym, before bed</td>
<td>Party/special event, romantic evening</td>
</tr>
</tbody>
</table>

### Change in Fragrance Usage

<table>
<thead>
<tr>
<th>Total</th>
<th>Past</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fragrance</td>
<td>Increased</td>
<td>Increase</td>
</tr>
</tbody>
</table>

### Brand Usage (unaided)

- Bath & Body Works: 23%↓
- CHANEL: 14%↑
- Calvin Klein: 10%↑
- ESTÉE LAUDER: 6%
### Fragrance Importance

**Ranked 1/2 in importance compared to other beauty categories:** 28%↑ (16%)

T3B agree that "I really don’t pay much attention to fragrances, it is just not that important to me": 36% (33%)

Leading Edge Consumers:

5% ↓

### Most Important Fragrance Needs (T2B)

- **It lasts all day**
  - 64% (64%)
- **It is high quality fragrance**
  - 54% (50%)
- **It is acceptable to wear at work**
  - 49% (44%)
- **It is good for sensitive skin**
  - 51%↑ (41%)

### Appropriate to Wear (T2B)

- At a party/special event – 71%↓ (88%)
- Dining with friends/family – 66%↓ (81%)
- At work – 60% (66%)
- Loved ones at home – 64% (64%)
- At school – 52% (58%)
Fragrance Shopping Statement Agreement (T3B)

- Good value for the money is important to me (58%)
- The places I shop for fragrance carry the brands I want (59%)
- I like to get fragrance samples when in-store (59%)
- I like to go to stores to try new fragrances (59%)
- The store that I buy fragrance from is important to me (53%)
- The fragrance shopping experience is overwhelming (43%)
- I buy fragrances online (45%)
- I use the internet to narrow down, then buy in store (49%)

Top Fragrance Purchase Triggers

- Running out/running low (44%)
- To treat myself (50%)
- Need gift for someone (23%)
- Shop because I enjoy it (32%)
- Spur of the moment (19%)
- Have gift card/credit to use (20%)
Status Seekers

Size of segment

<table>
<thead>
<tr>
<th>Importance</th>
<th>Value of segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Top Barriers to Using Perfume More Often
More likely to say:
• My favorite fashion brands don’t offer a perfume (7%↑ vs. 2%)  
Less likely to say:
• Other scented products are a good substitute (9%↓ vs. 18%)

Top Triggers for Using Perfume More Often
• Answer q’s and have the right fragrance suggested (58%↑ vs. 46%)  
• If it will come in smaller sizes (52%↑ vs. 44%)  
• If I knew more about the ingredients (51%↑ vs. 40%)  
• If shopping was more enjoyable (51%↑ vs. 39%)  
• If I knew the story behind the perfume (43%↑ vs. 27%)  
• They are higher than total on most triggers

Interest in Online Tools (T2B)

<table>
<thead>
<tr>
<th>Importance</th>
<th>Value of segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>41%</td>
</tr>
<tr>
<td>40%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Suggestions based on what I already know I like
Personality quiz recommending fragrances
User reviews
Live chat feature to act as an advisor

Need Gap
• They are significantly higher on importance on almost all criteria, but lower vs. total on satisfaction with: It comes in many forms of the same fragrance, I am familiar with many different types of scents used in fragrances, It is high quality fragrance, It is portable/easy to take on-the-go, It is acceptable to wear at work.

Biggest areas of opportunity for segment (high importance / lower satisfaction):
Fragrances that are acceptable at work, that are natural, portable and can buy anywhere

Satisfaction (Very satisfied/Satisfied with how well current fragrance options meet these needs)
## General Style Attitudes (T3B)

- I have different looks depending on my mood/occasion: 59% ↓
- I dress with a sense of individual style: 59% ↓
- I enjoy shopping for fun, whether I buy something or not: 63%
- More willing to purchase things if can customize it: 46%
- I make an effort to feel sexy: 48%
- Buy more fashion items online than a year ago: 42%
- More likely to buy a product designed by a celebrity: 25% ↑

## Fashionable on a Budget (believe in power of fashion but careful in how they indulge on designer labels and trends; brands are important, loyalty limited to a few lines; buy new clothes for the season; do not like to overspend)

Index = 142 (14%)

## Fashion First (wear brands to impress people; trend setters and followers; prefer designers and celebrity-endorsed; rely on magazines; not afraid to go over budget)

Index = 170 (15%)

## Function Over Fashion (indifferent to fashion and style; replacement rather than impulse buyers; only buy when have to and spend within budget; don’t keep up with trends)

Index = 138 (24%)

## Differentiating Personal Values (T3B)

<table>
<thead>
<tr>
<th>More likely to value ↑</th>
<th>Less likely to value ↓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wealth (38%)</td>
<td>Authenticity (61%)</td>
</tr>
<tr>
<td>Status (38%)</td>
<td>Romance (54%)</td>
</tr>
<tr>
<td>Simplicity (52%)</td>
<td>Being youthful (50%)</td>
</tr>
<tr>
<td>Experiences (49%)</td>
<td>Looking good (47%)</td>
</tr>
<tr>
<td>Sex (46%)</td>
<td></td>
</tr>
</tbody>
</table>

## Digital / Advertising Attitudes (MRI)

- Very/somewhat important to use social networking for:
  - To find out about products and services: 38% (114)
  - To rate or review a product or service: 30% (133)
  - To show support for my favorite companies or brands: 33% (135)
  - To receive exclusive offers, coupons or other discounts: 40% (120)
  - To gain access to VIP or Members-Only events: 27% (154)

- Used cell/mobile apps in past 30 days:
  - Shopping/retail: 21% (103)

- Describes attitude completely (8-10 on 10-pt scale):
  - Advertising helps keep me up-to-date about products & services that I need or would like to have: 17% (109)

## Other Interests (MRI)

- Played video games in last 30 days: 36% (122)
- Regular exercise (2+ times/wk) at a club: 14% (90)
- Wrote in an online blog (past 30 days): 3% (103)
- Car type most associate with: Green & Trendy – 41% (162)
### Other Interests (MRI) – where over-index

<table>
<thead>
<tr>
<th>Activity</th>
<th>Size of segment</th>
<th>Value of segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited a chat room – 7%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Participated in on-line dating – 3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open to mobile ads in exchange for services like live TV or messaging – 35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I enjoy being the center of attention – 44%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Social Networking, Photo Or Video-Sharing Sites Visited:**
- Google+ - 23% (113)
- Instagram – 37% (117)
- Twitter – 16% (114)
- Picasa – 3% (128)

**Websites Used:**
- TV Guide – 3% (126)
- Disney.com – 6% (136)
- Disneychannel.com – 4% (141)
- MTV.com – 4% (144)
- Yahoo! Movies – 3% (137)
- Careerbuilder.com – 9% (126)
- ESPN.com – 11% (123)
- Any Spanish language website – 7% (143)
Fragrance is important for everyday occasions; I wear it everywhere and want it to last all day. Mist and scented lotion are my go-to’s, but I have a lot of perfume choices that make it into the mix. I’m passionate about fragrance, love to shop in general and fragrance shopping is no different. The store experience is important to me -- the internet just doesn’t work for me when it comes to fragrance shopping. In store, I’m not overwhelmed with the variety and I like to go to the store to try out new fragrances.

Demographics

- Less likely to be Caucasian (48%↓ vs. 59%) and more likely to be Hispanic (31%↑ vs. 19%).
- Less likely to be college educated (15%↓ vs. 31%).
- Lower average HH income (68K↓ vs. 78K).

Age started using:

- Perfume (1%↓ vs. 5%) users are less likely to start using in their 30’s.

Aged

<table>
<thead>
<tr>
<th>Age</th>
<th>Total</th>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>53%</td>
<td>36%</td>
<td>74%↑</td>
</tr>
<tr>
<td>35-54</td>
<td>44%</td>
<td>40%↑</td>
<td>72%↑</td>
</tr>
<tr>
<td>55+</td>
<td>14%</td>
<td>38%↑</td>
<td>76%↑</td>
</tr>
</tbody>
</table>

Fragrance Usage*

- Scented body lotion users are more likely to apply fragrance as part of their regular beauty routine (50%↑ vs. 40%).
- Body mist users are more likely to apply fragrance as a regular routine, but not during their beauty routine (43%↑ vs. 26%).
- For perfume, body mist and scented body lotion users, applying fragrance is far less likely to be an after-thought (25%↓ vs. 35%), (21%↓ vs. 34%), (18%↓ vs. 29%).

Beauty Routine and Fragrance*

Occasions Use by Fragrance*

- Segment higher than average on:
  - Party/special event, formal/special lunch/dinner out with friends/family
  - Formal/special lunch/dinner out with friends/family
  - Running errands, casual lunch/dinner out with friends/family, with friends/family at home, school, gym

Brand Usage (unaided)

Change In Fragrance Usage

<table>
<thead>
<tr>
<th>Segment tips toward:</th>
<th>Past</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Fragrance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perfume</td>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Body lotion</td>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Body Mist</td>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Essential oil</td>
<td>Same</td>
<td>Increase</td>
</tr>
</tbody>
</table>
**Fragrance Importance**

- Ranked 1/2 in importance compared to other beauty categories: 23%↑ (16%)
- T3B agree that “I really don’t pay much attention to fragrances, it is just not that important to me”: 10%↓ (33%)

**Leading Edge Consumers:**
- 18%↑

**Most Important Fragrance Needs (T2B)**

- It lasts all day: 73%↑ (64%)
- It is high quality fragrance: 55% (50%)
- It is acceptable to wear at work: 44% (44%)
- It is good for sensitive skin: 45% (41%)

**Appropriate to Wear (T2B)**

- At a party/special event – 96%↑ (88%)
- Dining with friends/family – 93%↑ (81%)
- At work – 78%↑ (66%)
- Loved ones at home – 76%↑ (64%)
- At school – 74%↑ (58%)

**Skews toward…**

- Makes me feel fresh - 95%↑ (80%)
- To lift my mood - 82%↑ (71%)
- To express my individuality - 80%↑ (64%)
- Good memories assoc. with the scent - 79%↑ (60%)
- To please spouse/partner - 70%↑ (56%)

**Top Reasons Wear Fragrance (T3B)**

- It's more realistic for me to have a designer fragrance brand than designer clothing/accessories
- I prefer to buy fragrances that have been around a long time
- Most of the time I buy fragrances on impulse when out shopping for other things
- It's more realistic for me to have a designer fragrance brand than designer clothing/accessories

**Top Fragrance Attitudes (T3B)**

- Few favorites that are always a part of my collection: 86%↑
- I enjoy receiving the brand I use as a gift: 73%↑
- Where I buy doesn’t matter, as long as it’s a good brand: 70%↑
- I like to experiment with different fragrances: 82%↑
- I have a signature scent -- it's part of who I am: 64%↑
- I match my fragrance to my mood: 77%↑
- Good memories assoc. with the scent: 79%↑
- To please spouse/partner: 70%↑

**Also higher on…**

- I choose a fragrance based on the occasion
- I enjoy receiving fragrances as a gift regardless of the scent
- I like using fragrances that come from a fragrance collection
- I prefer to buy fragrances that have been around a long time
- It's more realistic for me to have a designer fragrance brand than designer clothing/accessories
- Most of the time I buy fragrances on impulse when out shopping for other things

**Size of segment**

<table>
<thead>
<tr>
<th></th>
<th>15%</th>
<th>20%</th>
</tr>
</thead>
</table>

**Value of segment**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

© GfK 2017  *Among category users  ↑↓ Indicates sig. higher/lower than total at 95% confidence
Fragrance Shopping Statement Agreement (T3B)

- Good value for the money is important to me: 89% ↑
- The places I shop for fragrance carry the brands I want: 88% ↑
- I like to get fragrance samples when in-store: 86% ↑
- I like to go to stores to try new fragrances: 79% ↑
- The store that I buy fragrance from is important to me: 47% ↑
- The fragrance shopping experience is overwhelming: 16% ↓
- I buy fragrances online: 3% ↓
- I use the internet to narrow down, then buy in store: 5% ↓

Fragrance Shopping Behaviors

- Purchase Channel (P6M)
  - In person (at a store) – 90% ↑ (68%)
  - Online – 8% ↓ (23%)

- More likely to shop at...
  - Beauty specialty
  - Brand specialty
  - High end dept.
  - Mainstream dept.
  - Discount dept.

Advice/Information on Purchases

- Friend/family member – 42% (36%)
- Store sales person – 35% ↑ (24%)
- Brands that I like/follow – 30% (23%)
- My favorite magazines – 23% (18%)
- Significant other/partner – 18% (14%)

Fragrance Shopping Behaviors (P6M)

- Sample fragrance – 61% ↑ (48%)
- Free trial bottle – 45% (39%)
- Free gift w/ purch offer – 38% ↑ (26%)
- In-store displays – 36% ↑ (24%)
- Ad w/ scent strip – 28% (23%)

Gifting Fragrance

- Received Fragrance as a gift (% Yes)
  - 66% ↑
  - 62% ↑
  - 51% ↑
  - 14% 0%

Fragrance Gifted Attitudes (T3B)

- This segment is more likely to enjoy receiving fragrance as a gift, regardless of the scent (60% ↑ vs. 45%)
- The segment is less likely to consider fragrances as too personal to be given as gifts (21% ↓ vs. 31%) and to return fragrances received as gifts (7% ↓ vs. 14%)

Buying Styles (MRI) - where over-index

- Does not over-index on any Buying Style

Top Fragrance Purchase Triggers

- Running out/running low: 69% ↑
- To treat myself: 58% ↑
- Need gift for someone: 34% ↑
- Shop because I enjoy it: 34% ↑
- Spur of the moment: 28% ↑
- Have gift card/credit to use: 29% ↑

*Among category users

↑↓ Indicates sig. higher/lower than total at 95% confidence
Top Barriers to Using Perfume More Often

Less likely to say:
- It is bad for my skin or skin condition/allergies (3%↓ vs. 8%)
- Variety of options is overwhelming (3%↓ vs. 8%)

Top Triggers for Using Perfume More Often

- If scent lasted longer (77%↑ vs. 64%)

Interest in Online Tools (T2B)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Importance</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suggestions based on what I already know I like</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Personality quiz recommending fragrances</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>User reviews</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Live chat feature to act as an advisor</td>
<td>7%↓</td>
<td></td>
</tr>
</tbody>
</table>

Need Gap

They are significantly higher vs. total on these importance metrics: It lasts all day, It is portable/easy to take on-the-go. They are more likely than total to be satisfied on: It is high quality fragrance.

Biggest areas of opportunity for segment (high importance / lower satisfaction):
None for this segment
## General Style Attitudes (T3B)

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have different looks depending on my mood/occasion</td>
<td>81%</td>
<td>↑</td>
</tr>
<tr>
<td>I dress with a sense of individual style</td>
<td>84%</td>
<td>↑</td>
</tr>
<tr>
<td>I enjoy shopping for fun, whether I buy something or not</td>
<td>83%</td>
<td>↑</td>
</tr>
<tr>
<td>More willing to purchase things if I can customize them</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>I make an effort to feel sexy</td>
<td>68%</td>
<td>↑</td>
</tr>
<tr>
<td>Buy more fashion items online than a year ago</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>More likely to buy a product designed by a celebrity</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

## Differentiating Personal Values (T3B)

<table>
<thead>
<tr>
<th>Value Type</th>
<th>Percentage</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to value</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authenticity</td>
<td>96%</td>
<td>↑</td>
</tr>
<tr>
<td>Romance</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>Being youthful</td>
<td>74%</td>
<td></td>
</tr>
<tr>
<td>Looking good</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>Sex</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Adventure</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Less likely to value</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Fashion & Style Attitudes Segment (MRI) – where over-index

### Fashionable on a Budget
- Believe in power of fashion but careful in how they indulge on designer labels and trends.
- Brands are important, loyalty limited to a few lines; buy new clothes for the season; do not like to overspend.

**Index = 153 (13%)**

### Fashion First
- Wear brands to impress people.
- Trendsetters and followers.
- Prefer designers and celebrity-endorsed.
- Rely on magazines; not afraid to go over budget.

**Index = 123 (12%)**

## Digital / Advertising Attitudes (MRI)

<table>
<thead>
<tr>
<th>Importance</th>
<th>Percentage</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very/somewhat important to use social networking for…</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To find out about products and services – 37% (111)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To rate or review a product or service – 26% (113)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To show support for my favorite companies or brands – 23% (93)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To receive exclusive offers, coupons or other discounts – 33% (100)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To gain access to VIP or Members-Only events – 16% (90)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Used cell/mobile apps in past 30 days…</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping/retail – 20% (99)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Describes attitude completely (8-10 on 10-pt scale)…</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising helps keep me up-to-date about products &amp; services that I need or would like to have – 21% (132)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Mobile Attitudes Segment (MRI) – where over-index

Does not over-index on any Mobile Attitude

## General Attitudes Segment (MRI) – where over-index

Does not over-index on any General Attitude

## Other Interests (MRI)

<table>
<thead>
<tr>
<th>Interest</th>
<th>Percentage</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Played video games in last 30 days – 29% (100)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular exercise (2+ times/wk) at a club – 16% (99)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wrote in an online blog (past 30 days) – 2% (84)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car type most associate with: Green &amp; Trendy – 23% (92)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Other Interests (MRI) – where over- or under-index

- Investment activity: Financial Advisor/Broker – 4% (73)
- Investment activity: Internet site – 3% (81)
- Investment activity: Family/friends – 4% (65)
- Retirement Or College Savings Plans: Any 401(k) – 12% (81)
- Retirement Or College Savings Plans: Traditional IRA – 6% (78)
- Retirement Or College Savings Plans: Roth IRA – 4% (76)
- On average, brands that are advertised are better in quality than brands that are not advertised – 14% (145)

Apps used in the last 30 days

- Healthcare – 9% (119)
- Magazine – 7% (134)
- Newspaper – 7% (129)

- Feel really good about seeing celebrities in the media that share my ethnic background - 42% (122)
I use fragrance for many reasons, but I don’t have a particularly strong opinion about it or feel like I need to talk about it. Fragrance is part of my wardrobe for social occasions when I want to be sophisticated and attractive. I only shop when I need to because the options overwhelm me and I stick to what I know, so I don’t own as many bottles of perfume as other women (though I do enjoy getting my brand as a gift!). Perfume and body lotion are my standards, but I do dabble with body spray and essential oil.

### Demographics
- More likely to be Caucasian (68% ↑ vs. 59%)
- Higher average HH income (89K ↑ vs. 78K)
- More likely to live in the Midwest (27% ↑ vs. 21%)

### Age Started Using*
- Essential oil (4% ↓ vs. 11%) users are less likely to start using as an early teen (13-15).

### Beauty Routine and Fragrance*
- No significant differences from Total on beauty routine and fragrance

### Fragrance Usage*

<table>
<thead>
<tr>
<th>Total</th>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>95%</td>
<td>33%</td>
<td>64%</td>
</tr>
<tr>
<td>78%</td>
<td>25%</td>
<td>58%</td>
</tr>
<tr>
<td>66%</td>
<td>27%</td>
<td>47%↓</td>
</tr>
<tr>
<td>37%↓</td>
<td>9%</td>
<td>21%↓</td>
</tr>
</tbody>
</table>

### Occasions Use by Fragrance*
- Segment higher than average on:
  - Party/special event, formal/special lunch/dinner out with friends/family
  - Casual lunch/dinner out with friends/family

### Change In Fragrance Usage

<table>
<thead>
<tr>
<th>Past</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased</td>
<td>Increase</td>
</tr>
<tr>
<td>Increased</td>
<td>Same</td>
</tr>
<tr>
<td>Same</td>
<td>Decrease</td>
</tr>
<tr>
<td>Increased</td>
<td>Same</td>
</tr>
</tbody>
</table>
### Social Accessorizers

<table>
<thead>
<tr>
<th>Size of segment</th>
<th>Value of segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>13%</td>
</tr>
</tbody>
</table>

### Fragrance Importance

Ranked 1/2 in importance compared to other beauty categories: 12% (16%)

T3B agree that “I really don’t pay much attention to fragrances, it is just not that important to me”: 23% (33%)

### Most Important Fragrance Needs (T2B)

- **It lasts all day**
  - 70% (64%)

- **It is high quality fragrance**
  - 55% (50%)

- **It is acceptable to wear at work**
  - 41% (44%)

- **It is good for sensitive skin**
  - 44% (41%)

### Appropriate to Wear (T2B)

- At a party/special event – 94%↑ (88%)
- Dining with friends/family – 91%↑ (81%)
- At work – 72% (66%)
- Loved ones at home – 64% (64%)
- At school – 64% (58%)

### Top Reasons Wear Fragrance (T3B)

- Makes me feel fresh – 90%↑ (80%)
- To lift my mood – 85%↑ (71%)
- To please spouse/partner – 76%↑ (56%)
- To express my individuality – 75%↑ (64%)
- To be attractive to others – 73%↑ (57%)
- Makes me feel sophisticated – 70%↑ (55%)

### Skews toward...

- Both

### Top Fragrance Attitudes (T3B)

#### Makes me feel fresh (Ranked 1 or 2)

- Fresh – 39% (38%)
- Happy – 27% (27%)
- Elegant – 17% (18%)
- Confident – 29% (26%)
- Sexy – 23% (22%)

### Also lower on...

- I like using fragrances that come from a fragrance collection
- Most of the time I buy fragrances on impulse when out shopping for other things
- I enjoy receiving fragrances as a gift regardless of the scent
- It’s more realistic for me to have a designer fragrance brand than designer clothing/accessories
- I choose a fragrance based on the occasion
- I want to know more about ingredients in fragrances
### Fragrance Shopping Statement Agreement (T3B)

- Good value for the money is important to me: 79%
- The places I shop for fragrance carry the brands I want: 76%
- I like to get fragrance samples when in-store: 68%
- I like to go to stores to try new fragrances: 50%
- The store that I buy fragrance from is important to me: 42%
- The fragrance shopping experience is overwhelming: 41%
- I use the internet to narrow down, then buy in-store: 22%

### Fragrance Shopping Behaviors

#### Purchase Channel (P6M)
- In person (at a store) – 72% (68%)
- Online – 21% (23%)

#### More likely to shop at...
- Beauty specialty
- Brand specialty
- High end dept.
- Mainstream dept.
- Discount dept.

#### Advice/Information on Purchases
- Friend/family member – 36% (36%)
- Store sales person – 26% (24%)
- Brands that I like/follow – 25% (23%)
- My favorite magazines – 13% (18%)
- Significant other/partner – 17% (14%)

### Fragrance Shopping Behaviors

#### Most Influential to Purchase (P6M)
- Sample fragrance – 49% (48%)
- Free trial bottle – 42% (39%)
- Free gift w/ purch offer – 27% (26%)
- In-store displays – 22% (24%)
- Ad w/ scent strip – 22% (23%)

### Gifting Fragrance

- Received Fragrance as a gift (% Yes)
  - 52% (71%)
  - 54% (59%)
  - 35% (38%)
  - 10% (45%)

#### Fragrance Gifited Attitudes (T3B)
- This segment is more likely to enjoy receiving fragrance as a gift, as long it is the brand it uses (71%↑ vs. 59%), and if it’s from a close family member or friend (49%↑ vs. 38%).
- This segment is less likely to enjoy receiving fragrance as a gift, regardless of the scent (35%↓ vs. 45%).

### Buying Styles (MRI) - where over-index

#### Habitualized Havers
- (comfort in tradition; buy what always bought; once find a brand they are comfortable with they stop looking)
  - Index = 128 (24%)

#### Conscientious Consumers
- (shop for bargains but cost is not main factor; buy American and environmentally safe products; conscious of quality and are brand loyal)
  - Index = 124 (25%)

---

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↑↓ Indicates sig. higher/lower than total at 95% confidence
Top Barriers to Using Perfume More Often

More likely to say:
- Variety is overwhelming (14%↑ vs. 8%)

Top Triggers for Using Perfume More Often

- Help from online sources to figure out what I would like (22%↓ vs. 29%)
- If I knew how to properly apply it (19%↓ vs. 27%)

Interest in Online Tools (T2B)

- Suggestions based on what I already know I like: 55%
- Personality quiz recommending fragrances: 42%
- User reviews: 38%
- Live chat feature to act as an advisor: 8%↓

Need Gap

- They are significantly lower vs. total on the following importance metrics: It is portable/easy to take on-the-go and It is a gender-neutral fragrance. They're on par with total on the satisfaction metrics.

Biggest areas of opportunity for segment (high importance / lower satisfaction):
None for this segment
### General Style Attitudes (T3B)

- I have different looks depending on my mood/occasion: 66%
- I dress with a sense of individual style: 70%
- I enjoy shopping for fun, whether I buy something or not: 65%
- More willing to purchase things if I can customize it: 55%
- I make an effort to feel sexy: 58%
- Buy more fashion items online than a year ago: 42%
- More likely to buy a product designed by a celebrity: 6% (↓)

### Differentiating Personal Values (T3B)

- More likely to value Authenticity (94%)
- Less likely to value Experiences (66%)
- Simpllicity (81%)
- Romance (75%)
- Looking good (63%)
- Sex (61%)

### Fashion & Style Attitudes Segment (MRI) – where over-index

- Does not over-index on any Fashion & Style Attitude

### Digital / Advertising Attitudes (MRI)

**Very/somewhat important to use social networking for...**
- To find out about products and services – 34% (102)
- To rate or review a product or service – 22% (96)
- To show support for my favorite companies or brands – 22% (89)
- To receive exclusive offers, coupons or other discounts – 35% (103)
- To gain access to VIP or Members-Only events – 15% (85)

**Used cell/mobile apps in past 30 days...**
- Shopping/retail – 21% (105)

**Describes attitude completely (8-10 on 10-pt scale)...**
- Advertising helps keep me up-to-date about products & services that I need or would like to have – 14% (90)

### Mobile Attitudes Segment (MRI) – where over-index

- Does not over-index on any Mobile Attitude

### General Attitudes Segment (MRI) – where over index

- Played video games in last 30 days – 26% (89)
- Regular exercise (2+ times/wk) at a club – 18% (112)
- Wrote in an online blog (past 30 days) – 3% (115)
- Car type most associate with: Green & Trendy – 20% (81)
- Regular exercise (2+ times/wk) at home – 35% (110)
- Regular exercise (2+ times/wk) at other facility – 10% (121)
- Camping - any overnight trips – 15% (120)

### Other Interests (MRI)

- Does not over-index on any General Attitude
Other Interests (MRI) – where over-index

Tech-Thusiasts - 4% (127)
Tech-Splorers – 15% (123)
Sports websites visited
  • foxsports.com - 4% (142)
  • MLB.com - 3% (141)
  • SportingNews.com - 1% (161)
I am not particularly involved in, invested in, or knowledgeable about the fragrance category; fragrance is less important to me than other beauty categories and is less likely to be a part of my routine. My perfume usage has declined over the past few years and it likely will continue to decline in the future; however, I’m a light perfume user today and am pretty average for other types of fragrances. Generally, I am less likely to be influenced by current trends or social pressure.

### Demographics
- Older on average (42.97↑ vs. 40.37)

### Fragrance Usage*

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume</td>
<td>92%</td>
<td>23%</td>
<td>61%</td>
</tr>
<tr>
<td>Body lotion</td>
<td>76%</td>
<td>20%</td>
<td>56%</td>
</tr>
<tr>
<td>Body Mist</td>
<td>73%</td>
<td>25%</td>
<td>52%</td>
</tr>
<tr>
<td>Essential oil</td>
<td>38%</td>
<td>8%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Beauty Routine and Fragrance*
- No significant differences vs. total

### Occasions Use by Fragrance*
- Segment higher than average on...

### Change In Fragrance Usage
- Same
- Decreased
- Increased
- Decrease

### Size of segment
- 17%

### Value of segment
- 14%

*Among category users

↑↓ Indicates sig. higher/lower than total at 95% confidence

© GfK 2017
At a party/special event – 90% (88%)
Dining with friends/family – 80% (81%)
At work – 64% (66%)
Loved ones at home – 63% (64%)
At school – 61% (58%)

Fragrance Importance

Ranked 1/2 in importance compared to other beauty categories: 8% (16%) - T3B agree that "I really don't pay much attention to fragrances, it is just not that important to me": 22% (33%)

Leading Edge Consumers:

Most Important Fragrance Needs (T2B)

- It lasts all day 63% (64%)
- It is high quality fragrance 46% (50%)
- It is acceptable to wear at work 38% (44%)
- It is good for sensitive skin 36% (41%)

Top Reasons Wear Fragrance (T3B)

- Makes me feel fresh - 72% (80%)
- To lift my mood - 64% (71%)
- To express my individuality - 54% (64%)
- Good memories assoc. with the scent - 49% (60%)
- Makes me feel sophisticated - 40% (55%)

Skews toward...

Perfume Non-perfume

Appropriate to Wear (T2B)

- At a party/special event
- Dining with friends/family – 80% (81%)
- At work – 64% (66%)
- Loved ones at home – 63% (64%)
- At school – 61% (58%)

Top Fragrance Attitudes (T3B)

- Few favorites that are always a part of my collection 78% (58%)
- I enjoy receiving the brand I use as a gift 58% (49%)
- Where I buy doesn't matter, as long as it's a good brand 49% (58%)
- I like to experiment with different fragrances 46% (49%)
- I have a signature scent -- it's part of who I am 44% (52%)
- Same fragrance in different forms to create a lasting scent 44% (52%)
- I match my fragrance to my mood 49% (52%)
- I want to know more about ingredients in fragrances 52% (52%)

I want fragrance to make me feel...(Ranked 1 or 2)

- Fresh – 39% (38%)
- Happy – 28% (27%)
- Sexy – 14% (22%)
- Confident – 31% (26%)
- Elegant – 16% (18%)
- Relaxed – 13% (7%)

- Both

- Both

- Both

- Both

*Among category users

↑↓ Indicates sig. higher/lower than total at 95% confidence

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### Fragrance Shopping Statement Agreement (T3B)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good value for the money is important to me</td>
<td>79%</td>
</tr>
<tr>
<td>The places I shop for fragrance carry the brands I want</td>
<td>69%</td>
</tr>
<tr>
<td>I like to get fragrance samples when in-store</td>
<td>75%</td>
</tr>
<tr>
<td>I like to go to stores to try new fragrances</td>
<td>51%</td>
</tr>
<tr>
<td>The store that I buy fragrance from is important to me</td>
<td>23%</td>
</tr>
<tr>
<td>The fragrance shopping experience is overwhelming</td>
<td>33%</td>
</tr>
<tr>
<td>I use the internet to narrow down, then buy in store</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Fragrance Shopping Behaviors

#### Purchase Channel (P6M)

- In person (at a store) – 64% (68%)
- Online – 31% (23%)

**Less likely to shop at…**

- Beauty specialty
- Brand specialty
- High end dept.
- Mainstream dept.
- Discount dept.

### Fragrance Shopping Behaviors

#### Advice/Information on Purchases

- Friend/family member – 35% (36%)
- Store sales person – 21% (24%)
- Brands that I like/follow – 21% (23%)
- My favorite magazines – 20% (18%)
- Significant other/partner – 9% (14%)

### Most Influential to Purchase (P6M)

- Sample fragrance – 56% (48%)
- Free trial bottle – 41% (39%)
- Free gift w/ purch offer – 27% (26%)
- In-store displays – 25% (24%)
- Ad w/ scent strip – 27% (23%)

### Gifting Fragrance

- Received Fragrance as a gift (% Yes)
  - 44% vs. 50%
  - 38% vs. 9%

### Fragrance Gifted Attitudes (T3B)

- This segment is less likely to return fragrances received as gifts (8% vs. 14%).

### Top Fragrance Purchase Triggers

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Running out/running low</td>
<td>57%</td>
</tr>
<tr>
<td>To treat myself</td>
<td>47%</td>
</tr>
<tr>
<td>Need gift for someone</td>
<td>24%</td>
</tr>
<tr>
<td>Shop because I enjoy it</td>
<td>15%</td>
</tr>
<tr>
<td>Spur of the moment</td>
<td>22%</td>
</tr>
<tr>
<td>Have gift card/credit to use</td>
<td>20%</td>
</tr>
</tbody>
</table>

*Also lower on…*

- *When I have a special occasion coming up* – 13% (19%)

### Penny-Pinchers

(just solely on cost; brand loyalty less important than coupon; little interest in technology)

- Index = 132 (15%)

### Buying Styles (MRI) - where over-index

- Among category users

- Indicates sig. higher/lower than total at 95% confidence
Top Triggers for Using Perfume More Often

- Help from online sources to figure out what I would like (21% vs. 29%)
- If I knew the story behind the perfume (17% vs. 27%)

Top Barriers to Using Perfume More Often

At parity with total in terms of top barriers:
- Forget to put it on (26% vs. 28%)
- People around me are sensitive to fragrances (22% vs. 20%)
- Other scented products are a good substitute (21% vs. 18%)
- The fragrances I like are too expensive (28% vs. 32%)

Interest in Online Tools (T2B)

- Suggestions based on what I already know I like 58%
- Personality quiz recommending fragrances 41%
- User reviews 41%
- Live chat feature to act as an advisor 8% ↓

Need Gap

They are significantly lower vs. total on these importance metrics:
- I am familiar with many different types of scents used in fragrances
- It comes in an appealing bottle
- It is a lighter version of my favorite scent

They are comparable to total on satisfaction.

Biggest areas of opportunity for segment (high importance / lower satisfaction):
- Fragrance that lasts all day

Satisfaction (Very satisfied/Satisfied with how well current fragrance options meet these needs)

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*Among category users  ↑↓ Indicates sig. higher/lower than total at 95% confidence
General Style Attitudes (T3B)

- I have different looks depending on my mood/occasion: 69%
- I dress with a sense of individual style: 72%
- I enjoy shopping for fun, whether I buy something or not: 62%
- More willing to purchase things if can customize it: 50%
- I make an effort to feel sexy: 40%
- Buy more fashion items online than a year ago: 38%
- More likely to buy a product designed by a celebrity: 5%

Fashion & Style Attitudes Segment (MRI) where over-index

- Does not over-index on any Fashion & Style Attitude Segments

Differentiating Personal Values (T3B)

More likely to value:
- Authenticity (93%)
- Looking good (46%)
- Adventure (33%)
- Status (15%)

Less likely to value:
- Romance (58%)
- Sex (43%)

Digital / Advertising Attitudes (MRI)

- Very/somewhat important to use social networking for...
  - To find out about products and services: 28% (83)
  - To rate or review a product or service: 17% (75)
  - To show support for my favorite companies or brands: 22% (91)
  - To receive exclusive offers, coupons or other discounts: 30% (89)
  - To gain access to VIP or Members-Only events: 14% (78)

Used cell/mobile apps in past 30 days...
- Shopping/retail: 18% (90)
- Describes attitude completely: 8-10 on 10-pt scale...
  - Advertising helps keep me up-to-date about products & services that I need or would like to have: 14% (85)

Mobile Attitudes Segment (MRI) – where over-index

- Disconnect (don’t have or use cell phones)
  - Index = 137 (4%)

General Attitudes Segment (MRI) – where over-index

- Culturally Connected
  - (focus less on self and more on things of this world: environment, fine arts, foreign cultures; less religious, more liberal)
  - Index = 121 (14%)
- Faith & Family
  - (do not venture far beyond families & faith; spending time with family is top priority; spiritual; little interest in environmental causes, arts, foreign cultures)
  - Index = 119 (38%)

Other Interests (MRI)

- Played video games in last 30 days: 29% (101)
- Regular exercise (2+ times/wk) at a club: 12% (77)
- Wrote in an online blog (past 30 days): 3% (111)
- Car type most associate with: Green & Trendy: 20% (80)

*Among category users
↑↓ Indicates sig. higher/lower than total at 95% confidence
Other Interests (MRI) – where over-index

Websites visited in the last 30 days
• cbs.com – 6% (125)
• CBSNews.com – 5% (126)

Magazines read
• First for Women – 4% (129)
• Guideposts – 3% (141)
• Soap Opera Digest – 3% (162)

I consider myself sophisticated – 49% (89)
Fragrance is not important to me – I don’t need it or want it. It’s an afterthought and more likely saved for special occasions regardless of form (except for essential oil, which I don’t like). Sensitivities/allergies is a key barrier for my lack of interest and wearing and I’m more likely to have a baby at home than other women. I’m less likely to have shopped for fragrance recently and find the fragrance shopping experience overwhelming and too difficult. I’m less likely to receive any fragrance as a gift, which is good, because I think that fragrance gifts are too personal. Fragrance is “not for me”.

Demographics
- More likely to be Caucasian (80%↑ vs. 59%)
- More likely to be college educated (47%↑ vs. 31%)
- Higher average HH income (95K↑ vs. 78K)
- More likely to be employed (70%↑ vs. 68%)
- More likely to live in the West (31%↑ vs. 23%)
- Has 1 child age 0-1: (13% vs. 5%)

Age Started Using*
- Essential oil (5%↑ vs. 1%) users are more likely to start using in their 60's.

Beauty Routine and Fragrance*
- Perfume, body mist, essential oil and body lotion users are more likely to consider applying fragrance as an after-thought, and not part of their regular routine (72%↑ vs. 35%), (59%↑ vs. 34%), (76%↑ vs. 48%), (65%↑ vs. 29%)
- Perfume, body mist, essential oil and body lotion are less likely to be applied as a part of the regular beauty routine (19%↓ vs. 40%), (21%↓ vs. 36%), (7%↓ vs. 21%), (21%↓ vs. 40%)
- Perfume, body mist, essential oil are less likely to apply as a regular routine, but not during the beauty routine (6%↓ vs. 22%), (16%↓ vs. 26%), (9%↓ vs. 24%)

Occasions Use by Fragrance*
Segment lower than average on...
- Formal/special lunch/dinner out with friends/family, at work, casual lunch/dinner out with friends/family, with friends/family at home, school, running errands, gym
- Before bed, casual lunch/dinner out with friends/family, with friends/family at home, running errands, school, gym
- At work, running errands, with friends/family at home, at school, gym, before bed
- School

Change In Fragrance Usage
Segment tips toward:
- Total Fragrance
  - Past: Decreased
  - Future: Decrease
- Perfume
  - Past: Decreased
  - Future: Decrease
- Body lotion
  - Past: Decreased
  - Future: Decrease
- Body Mist
  - Past: Decreased
  - Future: Decrease
- Essential oil
  - Past: Decreased
  - Future: Decrease
### Fragrance Importance

- Ranked 1/2 in importance compared to other beauty categories: 5%↓ (16%)

- T3B agree that "I really don't pay much attention to fragrances, it is just not that important to me": 86%↑ (33%)

### Leading Edge Consumers:

#### Most Important Fragrance Needs (T2B)

- It lasts all day: 46%ψ (64%)
- It is high quality fragrance: 26%ψ (50%)
- It is acceptable to wear at work: 36% (44%)
- It is good for sensitive skin: 24%ψ (41%)

### Top Reasons Wear Fragrance (T3B)

- Makes me feel fresh - 60%ψ (80%)
- To lift my mood - 48%ψ (71%)
- To be attractive to others - 41%ψ (57%)
- To please spouse/partner - 40%ψ (56%)
- To express my individuality - 39%ψ (64%)

### Top Fragrance Attitudes (T3B)

- Few favorites that are always a part of my collection - 40%ψ
- I enjoy receiving the brand I use as a gift - 32%ψ
- Where I buy doesn't matter, as long as it's a good brand - 43%ψ
- I like to experiment with different fragrances - 25%ψ
- I have a signature scent -- it's part of who I am - 24%ψ
- Same fragrance in different forms to create a lasting scent - 16%ψ
- I match my fragrance to my mood - 15%ψ

### Skews toward...

- Perfume
- Non-perfume

### Appropriate to Wear (T2B)

- At a party/special event – 89% (88%)
- Dining with friends/family – 71%ψ (81%)
- At work – 47%ψ (66%)
- Loved ones at home – 48%ψ (64%)
- At school – 34%ψ (58%)

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*Among category users

↑↓ Indicates sig. higher/lower than total at 95% confidence

*THE FRAGRANCE FOUNDATION*
**Fragrance Shopping Statement Agreement (T3B)**

- Good value for the money is important to me: 80%
- The places I shop for fragrance carry the brands I want: 47% ↓
- I like to get fragrance samples when in-store: 37% ↓
- I like to go to stores to try new fragrances: 15% ↓
- The store that I buy fragrance from is important to me: 11% ↓
- The fragrance shopping experience is overwhelming: 55% ↑
- I use the internet to narrow down, then buy in store: 9% ↓

**Fragrance Shopping Behaviors**

- **Purchase Channel (P6M)**
  - In person (at a store) – 40% ↓ (68%)
  - Online – 4% ↓ (23%)
  - Didn’t shop 59% ↑ (23%)

  *Less likely to shop at...

- Beauty specialty
- Brand specialty
- High end dept.
- Mainstream dept.
- Discount dept.

- **Advice/Information on Purchases**
  - Friend/family member – 32% (36%)
  - Store sales person – 9% ↓ (24%)
  - Brands that I like/follow – 9% ↓ (23%)
  - My favorite magazines – 6% ↓ (18%)
  - Significant other/partner – 7% ↓ (14%)

- **Most Influential to Purchase (P6M)**
  - Sample fragrance – 34% ↓ (48%)
  - Free trial bottle – 32% (39%)
  - Free gift w/ purch offer – 13% ↓ (26%)
  - In-store displays – 10% ↓ (24%)
  - Ad w/ scent strip – 11% ↓ (23%)

**Gifting Fragrance**

- Received Fragrance as a gift (% Yes)
  - 25% ↓
  - 42% ↓
  - 23% ↓
  - 8% ↓

**Fragrance Gifted Attitudes (T3B)**

- This segment is more likely to think fragrances are too personal to give as gifts (45% ↑ vs. 31%)
- This segment is less likely to enjoy receiving fragrance as a gift, as long as it is the brand it uses (32% ↓ vs. 59%) and enjoy receiving fragrance as a gift, regardless of the scent (20% ↓ vs. 45%).

**Buying Styles (MRI)**

- Among category users
- ↑↓ Indicates sig. higher/lower than total at 95% confidence
- MRI data not analyzed
Top Triggers for Using Perfume More Often

More likely to say:
- I forget to put it on (36% ↑ vs. 28%)
- The people around me are sensitive to fragrances (29% ↑ vs. 20%)
- It is bad for my skin or skin condition/allergies (18% ↑ vs. 8%)
- It’s not for someone like me (12% ↑ vs. 5%)

Top Barriers to Using Perfume More Often

Lower importance than total across all purchase criteria, except: It is acceptable to wear at work. They are significantly lower vs. total on these satisfaction metrics: Is a natural fragrance, It is high quality fragrance, It lasts all day, I can buy it anywhere I shop.

Interest in Online Tools (T2B)

- Suggestions based on what I already know I like: 34% ↓
- Personality quiz recommending fragrances: 22% ↓
- User reviews: 22% ↓
- Live chat feature to act as an advisor: 4% ↓

Need Gap

- If it was less expensive (61% ↓ vs. 75%)
- If I could control the strength of the scent (51% ↓ vs. 60%)
- If it were easier to find a perfume I like (47% ↓ vs. 56%)
- If scent lasted longer (45% ↓ vs. 64%)
- They are lower than total on nearly all triggers.

Biggest areas of opportunity for segment (high importance / lower satisfaction):
- Fragrance that lasts all day

Importance (Extremely/Very Important)

- Lasts all day
- Acceptable at work
- Natural fragrance
- It is good for sensitive skin
- High quality
- It comes in small sizes
- I can buy it anywhere
- Portable
- Comes in an appealing bottle

Satisfaction (Very satisfied/Satisfied with how well current fragrance options meet these needs)

- Designed specifically to combine more than one fragrance
- Many forms of the same fragrance
- Gender-neutral fragrance
- Familiar with different types of scents used in fragrances
- Many forms of the same fragrance
- It comes in small sizes
- I can buy it anywhere
- Portable
- Comes in an appealing bottle

© GfK 2017  *Among category users  ↑↓ Indicates sig. higher/lower than total at 95% confidence
General Style Attitudes (T3B)

- I have different looks depending on my mood/occasion: 63%
- I dress with a sense of individual style: 53%
- I enjoy shopping for fun, whether I buy something or not: 47%
- More willing to purchase things if can customize it: 38%
- I make an effort to feel sexy: 28%
- Buy more fashion items online than a year ago: 27%
- More likely to buy a product designed by a celebrity: 3%

Fashion & Style Attitudes Segment (MRI) – where over-index

MRI data not analyzed

Mobile Attitudes Segment (MRI) – where over-index

MRI data not analyzed

Differentiating Personal Values (T3B)

- More likely to value:
  - Authenticity (96%)
  - Experiences (89%)
  - Simplicity (82%)
- Less likely to value:
  - Being youthful (51%)
  - Looking good (34%)
  - Adventure (33%)
  - Wealth (19%)
  - Status (14%)

Digital / Advertising Attitudes (MRI)

MRI data not analyzed

Other Interests (MRI)

MRI data not analyzed

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*Among category users

↑↓ Indicates sig. higher/lower than total at 95% confidence
Overall Market Dynamics
The majority of women age 16-65 use some kind of personal fragrance and two-thirds of them are open to using perfume.

On a weekly basis, about one half of women use scented lotion, perfume and/or mist. Fragrance usage is not far behind foundation/powder usage.
Among overall fragrance users, nearly all use perfume for at least special occasions and two-thirds use weekly.

They use an average of just over two types of fragrance a week, and the combinations of perfume, lotion and mist are similarly sized – just under one half of fragrance users use a combination of two of the three types.

<table>
<thead>
<tr>
<th>Fragrance Type Use (including special occasions)</th>
<th>Use 1+ Times/Week (excluding special occasions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume</td>
<td>93%</td>
</tr>
<tr>
<td>Scented body lotion</td>
<td>80%</td>
</tr>
<tr>
<td>Body mist</td>
<td>74%</td>
</tr>
<tr>
<td>Essential oil</td>
<td>48%</td>
</tr>
</tbody>
</table>

Average number of types use 1+ times/week: 2.2

82% of Essential Oil users apply it directly to their skin (vs. mixing with a base oil or alcohol/water)

Weekly Usage of 2 Types (excluding special occasions)

<table>
<thead>
<tr>
<th>Fragrance Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume</td>
<td>46%</td>
</tr>
<tr>
<td>Scented body lotion</td>
<td>45%</td>
</tr>
<tr>
<td>Body mist</td>
<td>27%</td>
</tr>
<tr>
<td>Essential oil</td>
<td>44%</td>
</tr>
<tr>
<td>Used to call attention.</td>
<td>26%</td>
</tr>
</tbody>
</table>

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Fragrance Type User Demographic Skews:

Compared to the total population of women, fragrance users open to using perfume demographically profile the same except fragrance users are more likely to have children in the household (47% vs 42% for total women)

Looking at the different types of fragrance users, compared to Total Fragrance Users…

- **Weekly perfume users** skew Hispanic (22% vs 19% for total fragrance users), less educated (27% college degree vs 31%) and reside in the South (44% vs 38%) rather than the West (18% vs 23%)

- **Special occasion perfume users** skew Caucasian (66% vs 59%), more educated (39% college degree vs 31%), higher income ($83k avg. vs $78k), married (64% vs 59%), and reside in the West (30% vs 23%) rather than in the South (28% vs 38%)

- **Fragrance users that don’t use perfume** (but are open to using) skew older (25% 18-34 vs 35%, and 42% 35-49 vs 30%), Caucasian (71% vs 59%) and have children in the household (59% vs 47%)

- **Weekly lotion users** skew younger (39% 18-34 vs 35%, and 26% 50-65 vs 30%), Hispanic (22% vs 19%), and have children (51% vs 47%)

- **Special occasion lotion users** skew more educated (37% college degree vs 31%)

- **Weekly body mist users** skew younger (42% 18-34 vs 35%, and 26% 50-65 vs 30%), Hispanic (23% vs 19%), lower income ($73k vs $78k), have children (51% vs 47%), live in South (44% vs 38%) rather than West (19% vs 23%)

- **Special occasion body mist users** skew Gen X (39% vs 30% 35-49 yrs old), more educated (37% college degree vs 31%), heterosexual (4% vs 8% not heterosexual) and are less likely to live in the South (31% vs 38%)

- **Weekly essential oil users** are younger (42% vs 35% 18-34 and 23% vs 30% 50-65), African-American (17% vs 13%), Hispanic (30% vs 19%), less educated (26% vs 31%), lower income ($70k vs $78k), less likely married (53% vs 59%), have children (52% vs 47%), not heterosexual (12% vs 8%), are more likely to reside in the South (47% vs 38%) rather than the Midwest (14% vs 21%)

- **Special occasion essential oil users** skew younger (41% 18-34 vs 35%), lower income ($72k vs $78k) and have kids (54% vs 47%)
Perfume and essential oil are used more for special occasions than the other types of fragrance, and they are used less often.

On average fragrance users have about three bottles of the traditional types of fragrance, and heavier users have more bottles, especially for perfume and mist.

### Frequency of Usage (among users)

- **Perfume**:
  - Special occasions: 31%
  - 1-2 times a week: 16%
  - 3-4 times a week: 10%
  - 5-6 times a week: 9%
  - Once a day: 27%
  - More than once a day: 21%
  - Mean # times/week (excluding Special Occasion): 5.3

- **Scented body lotion**: 21%
- **Body mist**: 23%
- **Essential oil**: 34%

### Average # Bottles Own (among users)

- **Perfume**
  - Total Users: 3.0
  - Weekly Users: 3.4
  - Heavy/Super Heavy Users: 3.7

- **Scented body lotion**
  - Total Users: 3.1
  - Weekly Users: 3.3
  - Heavy/Super Heavy Users: 3.5

- **Body mist**
  - Total Users: 3.0
  - Weekly Users: 3.3
  - Heavy/Super Heavy Users: 3.8

- **Essential oil**
  - Total Users: 2.3
  - Weekly Users: 2.6
  - Heavy/Super Heavy Users: 3.1

Hispanics own more perfume.
Women are more likely to have started using lotion and mist in their pre to early teens than perfume, but still a majority of women started using perfume in their teens.

For about two-thirds of women using the traditional types of fragrance, they apply them as part of a routine.

### Age Started Using (among users)

<table>
<thead>
<tr>
<th>Age Started Using</th>
<th>Hispanic</th>
<th>African-American</th>
<th>Caucasian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-teen</td>
<td>15%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Early teen</td>
<td>26%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Later teen</td>
<td>31%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>20’s</td>
<td>20%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>30’s or later</td>
<td>7%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>

### Routine of Application (among users)

<table>
<thead>
<tr>
<th>Routine of Application</th>
<th>Hispanic</th>
<th>African-American</th>
<th>Caucasian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part of regular beauty routine</td>
<td>40%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Regular routine, but at a different time</td>
<td>22%</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>After-thought, not part of regular routine</td>
<td>35%</td>
<td>29%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Hispanics more likely apply scented body lotion as part of regular beauty routine; Non-routine wearers are less likely to mention wearing fragrance for all occasions.
Overall fragrance usage is anticipated to increase, especially for scented body lotion.

The main reason usage has declined is forgetting to apply it. Perfume usage also has declined because of price. Scented lotion is most likely to be declining because of a desire for more natural products.

### Change over time

- **Total fragrance**
  - Increased over time: 38%
  - Stayed the same: 30%
  - Decreased over time: 32%

- **Perfume**
  - Increased over time: 38%
  - Stayed the same: 30%
  - Decreased over time: 32%

- **Scented body lotion**
  - Increased over time: 36%
  - Stayed the same: 32%
  - Decreased over time: 23%

- **Body Mist**
  - Increased over time: 35%
  - Stayed the same: 34%
  - Decreased over time: 37%

- **Essential oil**
  - Increased over time: 32%
  - Stayed the same: 29%
  - Decreased over time: 32%

### Reasons for decline

<table>
<thead>
<tr>
<th>Reason for decline</th>
<th>Total fragrance</th>
<th>Perfume</th>
<th>Scented body lotion</th>
<th>Body Mist</th>
<th>Essential oil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forget to apply it</td>
<td>35%</td>
<td>41%</td>
<td>39%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Too expensive</td>
<td></td>
<td>32%^BCD</td>
<td>13%</td>
<td>15%</td>
<td>21%^BC</td>
</tr>
<tr>
<td>Professional reasons</td>
<td></td>
<td>18%^B</td>
<td>13%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Pregnant/young kids</td>
<td></td>
<td>17%^B</td>
<td>8%</td>
<td>15%^B</td>
<td>15%^B</td>
</tr>
<tr>
<td>Using more natural products</td>
<td>15%</td>
<td>21%^A</td>
<td>17%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Health conditions</td>
<td>13%^D</td>
<td>12%^D</td>
<td>11%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Not enough time</td>
<td>12%^BC</td>
<td>17%^AC</td>
<td>7%</td>
<td>19%^AC</td>
<td></td>
</tr>
<tr>
<td>Spouse doesn’t like</td>
<td>9%^BC</td>
<td>5%</td>
<td>4%</td>
<td>15%^ABC</td>
<td></td>
</tr>
<tr>
<td>Forget to buy more</td>
<td>9%</td>
<td>12%</td>
<td>15%^A</td>
<td>18%^AB</td>
<td></td>
</tr>
<tr>
<td>Other reasons</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
<td></td>
</tr>
</tbody>
</table>

16-34 year olds’ and Hispanics’ usage of perfume is more likely increasing than other groups.

Hispanics are more likely to say they’ve decreased perfume usage because of pregnancy/young kids.

Other reasons mentioned: Prefer another form, don’t go out as much, workplaces are fragrance free, scents are too strong, get headaches from the scent, don’t care about it as much, doesn’t last long enough.

© GfK 2017
Most women predict their usage of perfume, scented lotion and body mist will stay the same

Perfume and scented lotion usage skews toward increasing, while body mist users are closer to even on predictions of increasing and decreasing. Essential oil users are polarized with about one quarter of users predicting a decrease in usage, while about the same amount predicts an increase. Among non-users, essential oil is predicted to grow the most.

Caucasians are more likely to expect all types except mist to stay the same (and conversely, African-Americans and Hispanics expect their usage to increase)

Millennials are more likely to expect their perfume, mist and essential oil usage to increase
Usage is driven by type of occasion for perfume and body mist more than other categories.

Hispanics are more likely to use perfume for casual social occasions; African-Americans are more likely to use while working out & before bed.
Special events or dining out are considered the most appropriate places to wear fragrance; only two-thirds of fragrance users feel it is appropriate to wear at work.

The top emotions that women want to feel from wearing fragrance are fresh, happy, confident, sexy and elegant.

<table>
<thead>
<tr>
<th>Appropriate to wear (Top 2 box)</th>
<th>Top Emotions Want Fragrance to Make You Feel (Ranked 1 or 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Party or special event</td>
<td>Fresh</td>
</tr>
<tr>
<td></td>
<td>Happy</td>
</tr>
<tr>
<td>Dining with friends/family</td>
<td>Confident</td>
</tr>
<tr>
<td>Work</td>
<td>Sexy</td>
</tr>
<tr>
<td>Spending time with friends/</td>
<td>Elegant</td>
</tr>
<tr>
<td>family at home</td>
<td></td>
</tr>
<tr>
<td>School</td>
<td>Romantic</td>
</tr>
<tr>
<td>Running errands</td>
<td>Sophisticated</td>
</tr>
<tr>
<td>Down time at home</td>
<td>Unique</td>
</tr>
<tr>
<td>Working out</td>
<td>Relaxed</td>
</tr>
<tr>
<td></td>
<td>Energized</td>
</tr>
<tr>
<td></td>
<td>Fashionable</td>
</tr>
</tbody>
</table>

Perfume users are more likely to feel it’s appropriate to wear fragrance at work and school than non-users.

Baby Boomers are more likely say that fragrance makes them feel ‘fresh’. 16/17 year olds are more likely to say that wearing fragrance makes them feel ‘confident’.

Only emotions with 5% and higher are shown.
Feeling fresh and lifting moods are the most widespread reasons women wear fragrance. 

Non-perfume types are more likely to be used to feel fresh and cover natural scents, while perfume is more likely to be used because of good memories, being attractive, pleasing significant others, feeling sophisticated and attracting a mate.

### Reasons Wear Fragrance

<table>
<thead>
<tr>
<th>Reason to wear fragrance (top 3 box)</th>
<th>Reason to wear perfume</th>
<th>Reason to wear other types</th>
<th>('both' not shown)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feel fresh</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lift mood</td>
<td>71%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Express individuality</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good memories</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be attractive in general</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please spouse/partner</td>
<td>56%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feel sophisticated</td>
<td>55%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enhance people’s perceptions</td>
<td>46%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cover own natural scent</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attract a mate</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Feel fresh
Lift mood
Express individuality
Good memories
Be attractive in general
Please spouse/partner
Feel sophisticated
Enhance people's perceptions
Cover own natural scent
Attract a mate

Non-perfume types are more likely to be used to feel fresh and cover natural scents, while perfume is more likely to be used because of good memories, being attractive, pleasing significant others, feeling sophisticated and attracting a mate.
Most women have a few favorites, and roughly one half like to experiment while the same amount has a signature scent.

Fragrance purchases are not often impulse purchases.

### Fragrance Attitudes (Top 3 box)

- **I have a few favorite fragrances that are always a part of my collection:** 71%
- **I enjoy receiving fragrances as a gift as long as it is the brand I use:** 57%
- **It doesn't matter where I buy a fragrance as long as it is from a good brand:name:** 54%
- **I like to experiment with different fragrances:** 53%
- **I have a signature scent -- it's part of who I am:** 50%
- **I like to use the same fragrance in different forms to create a lasting scent:** 48%
- **I match my fragrance to my mood:** 47%
- **I choose a fragrance based on the occasion:** 46%
- **I enjoy receiving fragrances as a gift regardless of the scent:** 46%
- **I like using fragrances that come from a fragrance collection:** 46%
- **I want to know more about ingredients in fragrances:** 42%
- **I prefer to buy fragrances that have been around a long time:** 38%
- **It's more realistic for me to have a designer fragrance brand than designer clothing or other accessories:** 33%
- **Most of the time I buy fragrances on impulse when out shopping for other things:** 25%
Women purchase fragrance for a variety of reasons, most often when they’re running out or as a treat.

Only one quarter of women shop because they enjoy it, and slightly fewer buy it spur of the moment.

Most women shop in the store, and nearly one quarter shop for it online. But nearly one quarter did not shop in the past 6 months.

**Triggers for purchase**

- When I run out or am running low: 56%
- To treat myself: 47%
- When I need a gift for someone: 25%
- I shop for it because I enjoy it: 24%
- Spur of the moment while shopping: 21%
- When I have a store gift card or credit to use up: 21%
- When I have a special occasion coming up: 19%
- See an advertisement and am inspired to shop for it: 12%

**Where shop in past 6 months**

(Regardless of whether made a purchase)

- At a store or other location (in person): 68%
- Online: 23%
- Mail catalogue: 5%
- Phone order: 2%
- Shopping channel on TV: 23%

16-17 yr olds are more likely to shop at a physical store location.
Fragrance users shop at a wide variety of stores and websites, with perfume skewing higher at department stores, beauty specialty and Amazon, and lotion and mist skewing higher at specialty stores.

Where shopped in store for...
(If shopped in a store)

- Mainstream department store: 41%
- Beauty specialty stores: 26%
- Specialty stores for specific brands: 26%
- Mass merchandisers: 22%
- High end department store: 21%
- Discount department store: 19%
- Drug stores: 17%
- Other: 13%
- Beauty salon/ spa: 15%

Where shopped online for...
(If shopped online)

- Amazon.com: 28%
- Beauty specialty stores: 24%
- Mainstream department store: 22%
- Specialty stores for specific brands: 20%
- Mass merchandisers: 17%
- A specific brand’s site (e.g. Chanel.com): 15%
- High end department store: 13%
- Discount department store: 12%
- Drug stores: 10%

Hispanics are more likely to have shopped at mainstream department stores for perfume.

Millennials are more likely to have shopped in specialty stores for specific brands for perfume, and more likely to have shopped online at specialty stores for perfume.
The most important needs for fragrance are that it lasts all day, is high quality, is acceptable for work and is good for sensitive skin.

Generally fragrance users are satisfied with the most important needs.

Hispanics are more likely to be satisfied with how long their fragrance lasts and that it is a natural fragrance.
Friends and family are the most sought after for advice, while samples and free trials are most influential on purchase consideration.

<table>
<thead>
<tr>
<th>Advice/information sources for what to purchase or where to find what’s new to the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friend/family member</td>
</tr>
<tr>
<td>Store sales person</td>
</tr>
<tr>
<td>Brands that I like and follow</td>
</tr>
<tr>
<td>My favorite magazines</td>
</tr>
<tr>
<td>Significant other/partner</td>
</tr>
<tr>
<td>Social media</td>
</tr>
<tr>
<td>Online search</td>
</tr>
<tr>
<td>Retail store websites</td>
</tr>
<tr>
<td>Brand or fragrance company websites</td>
</tr>
<tr>
<td>Celebrities I like and follow</td>
</tr>
<tr>
<td>Bloggers/vloggers or YouTube channel I follow</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>None of the above</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Endorsements/advertisements that are most influential on purchase consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample fragrance</td>
</tr>
<tr>
<td>Free trial bottle</td>
</tr>
<tr>
<td>Free gift with purchase offer</td>
</tr>
<tr>
<td>In-store displays</td>
</tr>
<tr>
<td>Magazine ad with a scent strip</td>
</tr>
<tr>
<td>Word of mouth/friend endorsement</td>
</tr>
<tr>
<td>TV commercial</td>
</tr>
<tr>
<td>Magazine ad</td>
</tr>
<tr>
<td>Circular/flyers in the newspaper or mail</td>
</tr>
<tr>
<td>Social media endorsement</td>
</tr>
<tr>
<td>Celebrity endorsement</td>
</tr>
<tr>
<td>Online ad</td>
</tr>
<tr>
<td>Blogger/vlogger/ YouTube channel</td>
</tr>
<tr>
<td>Billboards</td>
</tr>
<tr>
<td>None of these</td>
</tr>
</tbody>
</table>

16-34 yr olds are more likely to be influenced by online endorsements/advertisements (and celebrities they like/follow for 16-17 yr olds).
Consumers seek out a good value, want to be able to find their brands where they shop, and like samples in the store.

About one half of fragrance users have received body lotion or perfume as gifts. Most women enjoy receiving gifts, but more so if it’s the brand(s) they use than any scent.

### Shopping Attitudes (Top 3 Box)
- Good value for the money is important to me: 77%
- The places I shop for fragrance carry the brands I want: 69%
- I like to get fragrance samples when in-store: 67%
- I like to go to stores to try new fragrances: 55%
- The store that I buy fragrance from is important to me: 39%
- The fragrance shopping experience is overwhelming: 37%
- I buy fragrances online: 27%
- I use the internet to narrow down fragrances I might like and then go to the store to try them: 23%

### Received as Gift in the Past 2 Years
- Body lotion: 53%
- Perfume: 52%
- Body mist: 41%
- Essential oil: 14%

### Type of perfume:
- Bottle: 89%
- Rollerball: 14%
- Travel spray: 17%
- Gift set: 26%
- Other: 1%

### Attitudes Toward Gifting (Top 3 Box)
- I enjoy receiving fragrance as a gift, as long it is the brand(s) I use: 59%
- I enjoy receiving fragrance as a gift, regardless of the scent: 45%
- Fragrances are appropriate from a close family member or friend, but not from more distant relatives/friends: 38%
- I think fragrances are too personal to give as gifts: 31%
- I usually return fragrances I get as gifts: 14%

- Combined, 74% enjoy receiving a gift

African Americans and Hispanics are more likely to enjoy receiving fragrances as a gift regardless of the scent.
The top barriers against using perfume more often are that it’s not top of mind, being around people with sensitivities, and having satisfactory substitutes. Heavy scent is especially undesired among perfume non-users.

Top of Mind – Barriers to Using Perfume At All/More Often (open end)

- Expensive – 20%
- Sensitivities/allergies – 14%
- Scent is too strong – 11% (29% among non-users)
- Forget to put it on/no time – 8%
- Lack of special occasions – 8%
- Other products are good substitutes – 7%
- Not appropriate for certain occasions (like work) – 6%
- Don’t need it/don’t need to apply that often – 6%
- Save for special occasions – 6%
- Don’t need/want to use it – 5%
- Bothers others – 5%
- Harmful chemical/prefer natural – 1% (6% among non-users)

“The thing that holds me back is that most of the perfumes out there seem to be strong and for normal day use I like the body spray which is a lighter scent and can be used all over.”

Barriers to Using Perfume At All/More Often

- I forget to put it on – 28%
- The people around me are sensitive to fragrances – 20%
- Other scented products are a good substitute – 18%
- Not a good value for the money – 13%
- Variety of options is overwhelming – 8%
- It is bad for my skin or skin condition/allergies – 8%
- It’s too difficult shopping for a new fragrance – 7%
- I’m not allowed to wear it to work – 7%
- I don’t know how to find the ‘right’ one – 6%
- It’s not for someone like me – 5%
- My spouse/partner doesn’t like it – 4%
- My favorite fashion brands don’t offer a perfume – 2%
- Advertisements for perfumes are not relatable – 2%
- Perfumes are old-fashioned – 2%
- None of these – 30%
Top triggers to increase usage other than price are longer lasting scent, control over the scent, trusting the quality and being easier finding what I like (one example is an online tool of suggestions based on what they already like)

### Triggers for Using Perfume At All/More Often

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less expensive</td>
<td>75%</td>
</tr>
<tr>
<td>Scent lasted longer</td>
<td>63%</td>
</tr>
<tr>
<td>Could control strength of the scent</td>
<td>61%</td>
</tr>
<tr>
<td>Could trust its quality for the price</td>
<td>59%</td>
</tr>
<tr>
<td>Were easier to find a perfume I like</td>
<td>56%</td>
</tr>
<tr>
<td>Could answer a few questions &amp; have the right fragrance suggested</td>
<td>46%</td>
</tr>
<tr>
<td>Came in smaller sizes</td>
<td>43%</td>
</tr>
<tr>
<td>Knew more about the ingredients</td>
<td>39%</td>
</tr>
<tr>
<td>Shopping for it was more enjoyable</td>
<td>38%</td>
</tr>
<tr>
<td>Had an informed advisor to help me through the selection process</td>
<td>34%</td>
</tr>
<tr>
<td>Stores had more choices</td>
<td>32%</td>
</tr>
<tr>
<td>Had help from online sources to figure out what I would like</td>
<td>29%</td>
</tr>
<tr>
<td>Knew how to properly apply it</td>
<td>27%</td>
</tr>
<tr>
<td>Knew the story behind the perfume</td>
<td>27%</td>
</tr>
<tr>
<td>Stores had fewer choices</td>
<td>25%</td>
</tr>
</tbody>
</table>

### Interest in Online Tools (Very/ Somewhat Interested)

- Suggestions based on what I already know I like – 51%
- Personality quiz that recommends fragrances – 40%
- User reviews – 39%
- Live chat feature to act as an advisor – 13%

Non-users have similar triggers but are less likely influenced if stores had more choices (17%) and if knew more about ingredients (33%)
Profile Data
<table>
<thead>
<tr>
<th></th>
<th>Total women</th>
<th>Total Frag Users**</th>
<th>Weekly perfume*</th>
<th>Special occasion perfume*</th>
<th>Perfume non-users (but open to using)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-17 yr old</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>18-34</td>
<td>34%</td>
<td>35%</td>
<td>38%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>35-49</td>
<td>29%</td>
<td>30%</td>
<td>29%</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>50-65</td>
<td>32%</td>
<td>30%</td>
<td>29%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Caucasian</td>
<td>61%</td>
<td>59%</td>
<td>55% ↓</td>
<td>66% ↑</td>
<td>71% ↑</td>
</tr>
<tr>
<td>African-American</td>
<td>13%</td>
<td>13%</td>
<td>15%</td>
<td>7% ↓</td>
<td>13%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>17%</td>
<td>19%</td>
<td>22% ↑</td>
<td>14% ↓</td>
<td>12% ↓</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>11% ↑</td>
<td>2% ↓</td>
</tr>
<tr>
<td>College degree</td>
<td>32%</td>
<td>31%</td>
<td>27% ↓</td>
<td>39% ↑</td>
<td>29%</td>
</tr>
<tr>
<td>Avg HH income</td>
<td>$78.3 K</td>
<td>$78.3 K</td>
<td>$75.7 K</td>
<td>$83.1 K ↑</td>
<td>$82.6 K</td>
</tr>
<tr>
<td>Married</td>
<td>56%</td>
<td>59%</td>
<td>57%</td>
<td>64% ↑</td>
<td>64%</td>
</tr>
<tr>
<td>Kids</td>
<td>42%</td>
<td>47% ↑</td>
<td>48%</td>
<td>46%</td>
<td>59% ↑</td>
</tr>
<tr>
<td>Employed</td>
<td>63%</td>
<td>62%</td>
<td>63%</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>Not heterosexual</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
<td>5% ↓</td>
<td>8%</td>
</tr>
<tr>
<td>Northeast</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Midwest</td>
<td>21%</td>
<td>21%</td>
<td>20%</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>South</td>
<td>38%</td>
<td>38%</td>
<td>44% ↑</td>
<td>28% ↓</td>
<td>34%</td>
</tr>
<tr>
<td>West</td>
<td>24%</td>
<td>23%</td>
<td>18% ↓</td>
<td>30% ↑</td>
<td>32%</td>
</tr>
</tbody>
</table>

*Arrows indicate significant differences from Total Fragrance Users at 95% confidence level.
**Total Fragrance Users compared to Total Women in the US age 16-65 (from screening data)
### Profile of users, continued

<table>
<thead>
<tr>
<th></th>
<th>Total Frag Users</th>
<th>Weekly lotion</th>
<th>Special occ lotion</th>
<th>Lotion non-users</th>
<th>Weekly mist</th>
<th>Special occ mist</th>
<th>Mist non-users</th>
<th>Weekly EO</th>
<th>Special occ EO</th>
<th>EO non-users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>16-17 yr old</strong></td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>18-34</strong></td>
<td>35%</td>
<td><strong>39%</strong></td>
<td>31%</td>
<td><strong>29%</strong></td>
<td><strong>42%</strong></td>
<td>30%</td>
<td><strong>27%</strong></td>
<td><strong>42%</strong></td>
<td>41%</td>
<td><strong>32%</strong></td>
</tr>
<tr>
<td><strong>35-49</strong></td>
<td>30%</td>
<td>29%</td>
<td>32%</td>
<td>32%</td>
<td>28%</td>
<td><strong>39%</strong></td>
<td><strong>33%</strong></td>
<td>31%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td><strong>50-65</strong></td>
<td>30%</td>
<td>26%</td>
<td>33%</td>
<td><strong>37%</strong></td>
<td><strong>26%</strong></td>
<td>27%</td>
<td><strong>36%</strong></td>
<td>23%</td>
<td>28%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Caucasian</strong></td>
<td>59%</td>
<td>56%</td>
<td>62%</td>
<td><strong>65%</strong></td>
<td><strong>55%</strong></td>
<td>64%</td>
<td><strong>66%</strong></td>
<td>44%</td>
<td>55%</td>
<td><strong>67%</strong></td>
</tr>
<tr>
<td><strong>African-American</strong></td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>11%</td>
<td>15%</td>
<td>13%</td>
<td>9%</td>
<td>17%</td>
<td>11%</td>
<td><strong>10%</strong></td>
</tr>
<tr>
<td><strong>Hispanic</strong></td>
<td>19%</td>
<td><strong>22%</strong></td>
<td>15%</td>
<td>14%</td>
<td><strong>23%</strong></td>
<td><strong>11%</strong></td>
<td>14%</td>
<td><strong>30%</strong></td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>College degree</strong></td>
<td>31%</td>
<td>28%</td>
<td><strong>37%</strong></td>
<td>35%</td>
<td><strong>25%</strong></td>
<td><strong>37%</strong></td>
<td><strong>39%</strong></td>
<td>26%</td>
<td>31%</td>
<td><strong>33%</strong></td>
</tr>
<tr>
<td><strong>Avg HH income</strong></td>
<td><strong>$78.3 K</strong></td>
<td><strong>$77.4 K</strong></td>
<td><strong>$79.0 K</strong></td>
<td><strong>$79.7 K</strong></td>
<td><strong>$72.6 K</strong></td>
<td><strong>$78.4 K</strong></td>
<td><strong>$85.9 K</strong></td>
<td><strong>$70.1 K</strong></td>
<td><strong>$71.9 K</strong></td>
<td><strong>$82.1 K</strong></td>
</tr>
<tr>
<td><strong>Married</strong></td>
<td>59%</td>
<td>58%</td>
<td>62%</td>
<td>62%</td>
<td>56%</td>
<td>62%</td>
<td>65%</td>
<td>53%</td>
<td>58%</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Kids</strong></td>
<td>47%</td>
<td><strong>51%</strong></td>
<td>50%</td>
<td>42%</td>
<td><strong>51%</strong></td>
<td>50%</td>
<td>44%</td>
<td><strong>52%</strong></td>
<td><strong>54%</strong></td>
<td>46%</td>
</tr>
<tr>
<td><strong>Employed</strong></td>
<td>62%</td>
<td>61%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>61%</td>
<td>63%</td>
<td>63%</td>
<td>64%</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Not heterosexual</strong></td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>10%</td>
<td>4%</td>
<td>7%</td>
<td><strong>12%</strong></td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Northeast</strong></td>
<td>18%</td>
<td>18%</td>
<td>17%</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>20%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Midwest</strong></td>
<td>21%</td>
<td>20%</td>
<td>19%</td>
<td>21%</td>
<td>20%</td>
<td>24%</td>
<td><strong>22%</strong></td>
<td>14%</td>
<td><strong>18%</strong></td>
<td><strong>24%</strong></td>
</tr>
<tr>
<td><strong>South</strong></td>
<td>38%</td>
<td>40%</td>
<td>35%</td>
<td>36%</td>
<td><strong>44%</strong></td>
<td><strong>31%</strong></td>
<td><strong>31%</strong></td>
<td>47%</td>
<td>41%</td>
<td><strong>34%</strong></td>
</tr>
<tr>
<td><strong>West</strong></td>
<td>23%</td>
<td>22%</td>
<td>28%</td>
<td>24%</td>
<td><strong>19%</strong></td>
<td>26%</td>
<td>27%</td>
<td>21%</td>
<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Arrows indicate significant differences from Total Fragrance Users at 95% confidence level.