

## Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Shoppers are bombarded with variety across numerous categories including fine fragrance, personal care, and household. Brands will need to focus on delivering more value, especially when targeting older consumers, as a way to help curb sales declines.”

– Shannon Romanowski, Senior Beauty and Personal Care Analyst

### This report looks at the following areas:

- Fragrance sales are struggling
- Fragrance usage declines with age
- Growing awareness and concern regarding ingredient safety

The fragrance category posted steady gains after the recession, but has been on the decline since 2012, with sales expected to struggle through 2019. Waning consumer interest, a struggling mass market, and competition from scented personal care products are all hindering category growth. Looking ahead, fragrance brands will be challenged to innovate around new formats, new benefits, and improved retailing in order to curb sales declines.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

### Executive Summary

The market

Figure 1: Total US sales and fan chart forecast of fragrances, at current prices, 2009-19

Market factors

Figure 2: Household income distribution, 2012

Segment performance

Figure 3: Total US retail sales of fragrances, segmented by type, 2012 and 2014

The consumer

More than half of consumers use perfume and cologne

Figure 4: Use of fine fragrance, any and regular use, May 2014

A well-liked scent, familiarity drive purchasing of fine fragrances

Figure 5: Top five reasons for purchasing fine fragrance, May 2014

Shoppers interested in natural and functional benefits

Figure 6: Interest and willingness to spend for top five new claims and benefits, May 2014

Promotional incentives, eco-friendly concepts resonate with scent wearers

Figure 7: Interest in top five new fragrance formats, May 2014

What we think

### Issues and Insights

Fragrance sales are struggling

The issues

The implications: Look to alternative formats, added benefits

Fragrance usage declines with age

The issues

The implications: Highlight wellness benefits, targeted advertising

Growing awareness and concern regarding ingredient safety

The issues

The implications: Leverage high interest in natural fragrances, eco-friendly concepts

### Trend Applications

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Trend: Transumers
- Trend: Objectify
- Trend: Green and Lean

## Market Size and Forecast

### Key points

#### Sales and forecast of fragrances

Figure 8: Total US sales and forecast of fragrances, at current prices, 2009-19

Figure 9: Total US sales and forecast of fragrances, at inflation-adjusted prices, 2009-19

#### Struggles expected to continue for the fragrance category

Figure 10: Total US sales and fan chart forecast of fragrances, at current prices, 2009-19

#### Forecast methodology

## Market Drivers

### Key points

#### Wealth disparity impacts purchasing behavior

Figure 11: Household income distribution, 2012

Figure 12: Fragrance expenditures, by gender, November 2012-December 2013

#### Aging population represents strongest growth potential

Figure 13: Any use of fragrance and scented products, by age, May 2014

Figure 14: Population aged 18 or older, by age, 2009-19

#### Category impacted by demand for transparency and tightening regulations

## Competitive Context

### Key points

#### Fine fragrances face competition from lower-priced formats

Figure 15: Use of scented toiletries, any and regular use, May 2014

#### Younger consumers, women drive usage of lower-priced items

Figure 16: Any use of scented toiletries, by gender and age, May 2014

## Segment Performance

### Key points

#### Both segments struggle to grow, but men's fragrances gain share

#### Sales of fragrances, by segment

Figure 17: Total US retail sales of fragrances, segmented by type, 2012 and 2014

## Segment Performance – Women's Fragrances

### Key points

#### Women's fragrances on the decline

#### Sales and forecast of women's fragrances

Figure 18: Total US sales and forecast of women's fragrances, at current prices, 2009-19

## Segment Performance – Men's Fragrances

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Key points

Men's fragrances will continue to grow...slowly

Sales and forecast of men's fragrances

Figure 19: Total US sales and forecast of men's fragrances, at current prices, 2009-19

## Retail Channels

### Key points

Other retail channels dominate sales, but struggle to grow

Sales of fragrances, by channel

Figure 20: Total us retail sales of fragrances, by channel, 2012 and 2014

Mass retailers hit hardest by struggling fragrance sales

Figure 21: Total us retail sales of fragrances, by channel, 2009-14

## Brand Usage

### Key points

Old Spice, Axe remain popular

Figure 22: Brands of aftershave and cologne used, October 2007-December 2013

Use of leading perfume brands on the decline

Figure 23: Brands of perfume, cologne, and toilet water used, October 2007-December 2013

## Innovations and Innovators

New product launch trends

Figure 24: Fragrance launches, by share, 2009-14

Category innovations

Collections

Flowers

Formats

Natural scents

Figure 25: Natural fragrance claims, by share, 2009-14

Prestige men's body sprays

Figure 26: Body spray launches, by share, 2009-14

Primers

## Marketing Strategies

Overview of the brand landscape

Musician endorsements

Figure 27: One Direction Our Moment fragrance ad, 2013

Fragrance gets social

Figure 28: Burberry Brit Rhythm Women's fragrance ad, 2014

Figure 29: Ralph Lauren Polo Red fragrance ad, 2013

Limited-edition concepts

## Social Media

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Key points

### Market overview

### Key social media metrics

Figure 30: Key social media metrics, July 2014

### Brand usage and awareness

Figure 31: Brand usage or awareness for select fragrance brands, May 2014

### Interactions with fragrance brands

Figure 32: Interactions with select fragrance brands, May 2014

### Leading online campaigns

### Digital partnerships

### User-generated content

### Celebrity partnerships

### What we think

### Online conversations

Figure 33: Online share of voice for select fragrance brands, by week, July 21, 2013-July 20, 2014

### Where people are talking about fragrances

Figure 34: Online share of voice for select fragrance brands, by page type, July 21, 2013-July 20, 2014

### What people are talking about

Figure 35: Topics of conversations for select fragrance brands, July 21, 2013-July 20, 2014

## Use of Fine Fragrance

### Key points

#### More than half of adults wear perfume, cologne

Figure 36: Use of fine fragrance, any and regular use, May 2014

Figure 37: Any use of fine fragrance, by gender, May 2014

Figure 38: Any use of fine fragrance, by gender and age, May 2014

#### Women seek variety, men prefer customization

Figure 39: Usage behavior of fine fragrance, by gender, May 2014

Figure 40: Usage behavior of fine fragrance, by gender and age, May 2014

## Reasons for Purchasing Fine Fragrance

### Key points

#### Scent, product familiarity are key purchase drivers of fine fragrance

#### Men more likely to be influenced by others when selecting fragrance

Figure 41: Reasons for purchasing fine fragrance, by gender, May 2014

#### Younger fragrance wearers influenced by a variety of factors

Figure 42: Reasons for purchasing fine fragrance, by gender and age, May 2014

## Interest in New Claims and Benefits Based on Price

### Key points

#### Shoppers willing to spend for added function and natural products

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 43: Interest and willingness to spend for new claims and benefits, May 2014

Interest in claims is high, though younger shoppers more willing to spend

Figure 44: Interest and willingness to spend for new claims and benefits, by gender and age, May 2014

### Interest in New Formats

#### Key points

Shoppers seek value, promotional incentives

Going green as a means to saving money resonates with consumers

Figure 45: Interest in new fragrance formats, May 2014

Figure 46: Any Interest in new fragrance formats, by gender, May 2014

Men interested in convenience, technology

Figure 47: Any Interest in new fragrance formats, by gender and age, May 2014

### Attitudes toward Fragrances

#### Key points

Fragrance perceptions differ between people

Scent wearers like to select their own fragrance

Figure 48: Attitudes toward fragrances, by gender, May 2014

Figure 49: Attitudes toward fragrances, by gender and age, May 2014

### Race and Hispanic Origin

#### Key points

Scent is important to multicultural consumers

Figure 50: Any use of fine fragrance, by race/Hispanic origin, May 2014

Figure 51: Any use of scented toiletries, by race/Hispanic origin, May 2014

Black shoppers seek variety, but brand trust is also important

Figure 52: Usage behavior of fine fragrance, by race/Hispanic origin, May 2014

Figure 53: Reasons for purchasing fine fragrance, by race/Hispanic origin, May 2014

Hispanics willing to spend for added benefits

Figure 54: Interest and willingness to spend for new claims and benefits, by race/Hispanic origin, May 2014

Technology could be opportunity to target multicultural consumers

Figure 55: Any Interest in new fragrance formats, by race/Hispanic origin, May 2014

### Appendix – Other Useful Consumer Tables

#### Usage of fine fragrance and scented toiletries

Figure 56: Use of fragrance and scented toiletries, May 2014

Figure 57: Any use of fine fragrance, by age, May 2014

Figure 58: Any use of fine fragrance, by household income, May 2014

Figure 59: Regular use of fine fragrance, by race/Hispanic origin, May 2014

Figure 60: Any use of scented toiletries, by age, May 2014

Figure 61: Any use of scented toiletries, by household income, May 2014

Figure 62: Regular use of scented toiletries, by race/Hispanic origin, May 2014

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Usage behavior of fine fragrance

Figure 63: Usage behavior of fine fragrance, by age, May 2014

Figure 64: Usage behavior of fine fragrance, by household income, May 2014

### Reasons for purchasing fine fragrance

Figure 65: Reasons for purchasing fine fragrance, by household income, May 2014

### Interest in new formats

Figure 66: Any Interest in new fragrance formats, by household income, May 2014

### Attitudes toward fragrances

Figure 67: Attitudes toward fragrances, by household income, May 2014

Figure 68: Attitudes toward fragrances, by race/Hispanic origin, May 2014

## Appendix – Social Media

### Brand usage or awareness

Figure 69: Brand usage or awareness, May 2014

Figure 70: Thierry Mugler (ie Angel, Alien) usage or awareness, by demographics, May 2014

Figure 71: Burberry (ie Brit) usage or awareness, by demographics, May 2014

Figure 72: Kenneth Cole (ie Reaction) usage or awareness, by demographics, May 2014

Figure 73: Marc Jacobs (ie Daisy, Honey) usage or awareness, by demographics, May 2014

Figure 74: Gucci (ie Envy) usage or awareness, by demographics, May 2014

Figure 75: Lancôme (ie Trésor, Hypnôse) usage or awareness, by demographics, May 2014

### Activities done

Figure 76: Activities done, May 2014

Figure 77: Thierry Mugler – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 78: Thierry Mugler – Activities done – I follow/like the brand on social media because, by demographics, May 2014

Figure 79: Thierry Mugler – Activities done – I have researched the brand on social media to, by demographics, May 2014

Figure 80: Burberry – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 81: Burberry – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, May 2014

Figure 82: Burberry – Activities done – I have researched the brand on social media to, by demographics, May 2014

Figure 83: Kenneth Cole – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 84: Kenneth Cole – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, May 2014

Figure 85: Kenneth Cole – Activities done – I have researched the brand on social media to, by demographics, May 2014

Figure 86: Marc Jacobs – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 87: Marc Jacobs – Activities done – I have researched the brand on social media to, by demographics, May 2014

Figure 88: Gucci – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 89: Gucci – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, May 2014

Figure 90: Gucci – Activities done – I follow/like the brand on social media because, by demographics, May 2014

Figure 91: Gucci – Activities done – I have researched the brand on social media to, by demographics, May 2014

Figure 92: Lancôme – Activities done – I have looked up/talked about this brand online on social media, by demographics, May 2014

Figure 93: Lancôme – Activities done – I have researched the brand on social media to, by demographics, May 2014

### Online conversations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - August 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 94: Online share of voice for select fragrance brands, by page type, July 21, 2013-July 20, 2014

Figure 95: Topics of conversations for select fragrance brands, July 21, 2013-July 20, 2014

### Key social media metrics

Figure 96: Key social media metrics for select fragrance brands, July 2014

### Appendix –Trade Associations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)