

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Legacy fragrance houses are struggling due to the rise of indie perfumeries and cross-category competition, and traditional fragrance offerings no longer meet the needs of key demographics. On top of that, US consumers are continuing to spend less money year over year on fragrances."

- Clare Hennigan, Senior Beauty & Personal Care Analyst

This report looks at the following areas:

- Scented personal care takes share from fragrance
- Chemical concerns hinder growth
- Retailers fail to attract key demographics

Women in the US are spending less money on fragrance year over year. Legacy fragrance houses are losing share to indie perfumeries and lower-cost scented body care products. Additionally, concerns over chemicals are dissuading consumers from fine fragrances, and redirecting them to natural alternatives like essential oils.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: 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



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Market overview

The issues

Scented personal care takes share from fragrance

Figure 1: Fragrance usage, October 2019

Chemical concerns hinder growth

Figure 2: Select Attitudes towards fragrances – any agree/disagree, October 2019

Retailers fail to attract key demographics

Figure 3: Retailers shopped, by 18-24 age group, October 2019

The opportunities

Black adults are a bright spot in the fragrance category

Figure 4: Select fragrance purchase influencers, by Black non-Hispanics, October 2019

Men are engaged fragrance users

Figure 5: Attitudes towards fragrances - any agree, by gender, October 2019

Functional fragrances increase appeal

What it means

The Market – What You Need to Know

Fragrance spend slowly declines

Scented personal care products pose a threat to fine fragrances

Fragrance gets called out by clean beauty

Fragrances meet digital disruption

Market Perspective

Fragrance spend slowly declines

Figure 6: Female fragrance spend, Simmons Spring NHCS Adult Study 12-month, Spring 2014-19

Scented personal care products pose a threat to fine fragrances

Figure 7: Fragrance importance by category, October 2019

Figure 8: Fragrance Importance- any rank, October 2019

Market Factors

Fragrance gets called out by clean beauty

Figure 9: Tara Foley, CEO of clean beauty retailer Follain discusses cosmetic regulation on QueerEye star Jonathan Van Ness's Getting Curious podcast.

Fragrances meet digital disruption

Figure 10: Retailers Shopped, October 2019

Key Players – What You Need to Know

BUY THIS REPORT NOW



eport Price: £3254.8	33 \$4395.00 €3662.99	The above prices are correct at the time of publication, but are subj change due to currency fluctua
Functional fragran	ces. FTW	
-	igrances puts pressure on legacy bran	ds
Wellness takes (s)		
What's Working		
Fragrance is more	than what meets the nose	
Functional fragran	ces, FTW	
What's Struggling		
	grances puts pressure on legacy brand grance purchase influencers, October 2	
Fear of "over" sme	elling challenges fine fragrances	
What to Watch		
Natural ingredient	s reign, but synthetics prove they are	up to snuff
Subtle scents swa	y skeptics	
Wellness takes (s)	icenter stage	
The Consumer - V	Vhat You Need to Know	
Scented personal	care products drive usage	
Light scents and lo	ow cost bolster body sprays	
Fragrance shoppir	g destinations remain scattered	
Natural ingredient	s and added benefits appeal to Hispan	nic consumers
In-store presence	still matters for scented items	
Men are engaged	fragrance wearers	
Fragrance and Sce	ented Personal Care Usage	
•	care products drive usage grance usage, October 2019	
	ety of fragranced products, men stick ect fragrance ownership, by gender, O	
	rs use alternative formats, older consu grance usage, by age, October 2019	imers stick to staples
	ngaged fragrance users ect fragrance usage, by race and Hispa	anic origin, October 2019
	ners own multiple fragrance products ertoire analysis of fragrance usage, Oc	ctober 2019
Frequency of Proc	luct Usage	
Most fragrance we	earers adapt an all or nothing approach	h
-	ow cost bolster body sprays quency of usage, October 2019	

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 18: Regular and occasional usage of body spray, perfume and cologne, by age, October 2019

Retailers Shopped

Fragrance shopping destinations remain scattered

Discount stores keep pace with specialty beauty retailers Figure 19: Retailers Shopped, October 2019

Men seek convenience, women prefer specialty Figure 20: Retailers Shopped, by gender, October 2019

Department stores fail to attract younger consumers

Figure 21: Retailers Shopped, by age, October 2019

Fragrance retailers are missing out on Hispanic consumers

Figure 22: Retailers Shopped, by select race and Hispanic origin, October 2019

Purchase Influencers

Recommendations drive unfamiliar scent purchases

Figure 23: Fragrance Purchase Influencers, October 2019

Women are influenced by friends and family

Figure 24: Fragrance Purchase Influencers, by gender, October 2019

Younger consumers seek added benefits

Figure 25: Fragrance purchase influencers, by age, October 2019

Natural ingredients and added benefits appeal to Hispanic consumers

Figure 26: Fragrance Purchase Influencers, by race and Hispanic Origin, October 2019

Fragrance brands struggle to reach the entire population

Figure 27: TURF Analysis – Purchase influencers, October 2019

Methodology

Behaviors toward Fragrances

Scented personal care takes share from fine fragrance

In-store presence still matters for scented items Figure 28: Behaviors Toward Fragrances, October 2019

Seasonal scents appeal to women

Figure 29: Behaviors toward fragrances, by gender, October 2019

Behaviors towards fragrances vary little by age

Figure 30: Behaviors toward fragrances, by age, October 2019

Lack of Hispanic engagement could pose challenges for category growth Figure 31: Behaviors Toward Fragrances, by race and Hispanic Origin, October 2019

Attitudes toward Fragrances

Fragrance wearers are brand loyal

Figure 32: Attitudes toward fragrances, October 2019

Men are engaged fragrance wearers

Figure 33: Attitudes toward fragrances - any agree, by gender, October 2019

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Younger consumers find fragrance shopping overwhelming

Figure 34: Attitudes toward fragrances - any agree, by age, October 2019

Ingredient concerns influence Black and Hispanic consumers differently

Figure 35: Select attitudes towards fragrances - any agree, by race and Hispanic origin, October 2019

Appendix – Data Sources and Abbreviations

Consumer survey data

Abbreviations and terms

Abbreviations

BUY THIS REPORT NOW