



# FRAGRANCE MARKET & CONSUMER REPORT 2023



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# 01: Introduction

Welcome to our first category-specific report. At Relish we are lucky to work with brands across the range of FMCG categories. We know that marketing and promotional activity in each category requires different approaches and specific know-how.

We aim to showcase findings from our research product Try.Love.Buy, with primary data from trusted national sources like YouGov and Kantar, together with aggregated findings from across the web.

## Category is...

Fragrances & aftershaves. Where the term fragrance is referenced in this report, we mean specifically Eau de parfum, Eau de toilette, Eau de fraiche and Eau de cologne.

"Fragrances are powerful magicians that can transport you through the years you have lived"

Helen Keller

## The History of Fragrance

The term perfume comes from the Latin "per fumum", which means "through smoke". It came from the use of oils and aromas, such as incense, that was burnt in religious and spiritual ceremonies. There is a long history of the importance of fragrance in our lives.

### DID YOU KNOW?

Perfume comes from the Latin "per fumum" meaning "through smoke"

Nowadays perfume is an important part of self-care. Body care products keep us clean, perfume is the final flourish that adds personality and panache.

## Olfaction is the oldest of our senses

Olfaction, or our sense of smell, is our oldest, most-evolved sense. It's processed by the limbic system, which is on the same side of the brain where emotions and memories are kept. The scent is the strongest sense linked to memory and emotion. According to Mood Media scent research, we can recall scents with 65% accuracy after 1 year. The Proust Effect is a name given to the strong link between scent and memory.

# 02: The fragrance market

## Global sales

According to analysis by FlexMR, global sales of fragrances (eau de parfum, eau de toilette, eau de cologne) reached beyond \$40 billion in 2022 with a 5.6% increase forecast up to 2032.

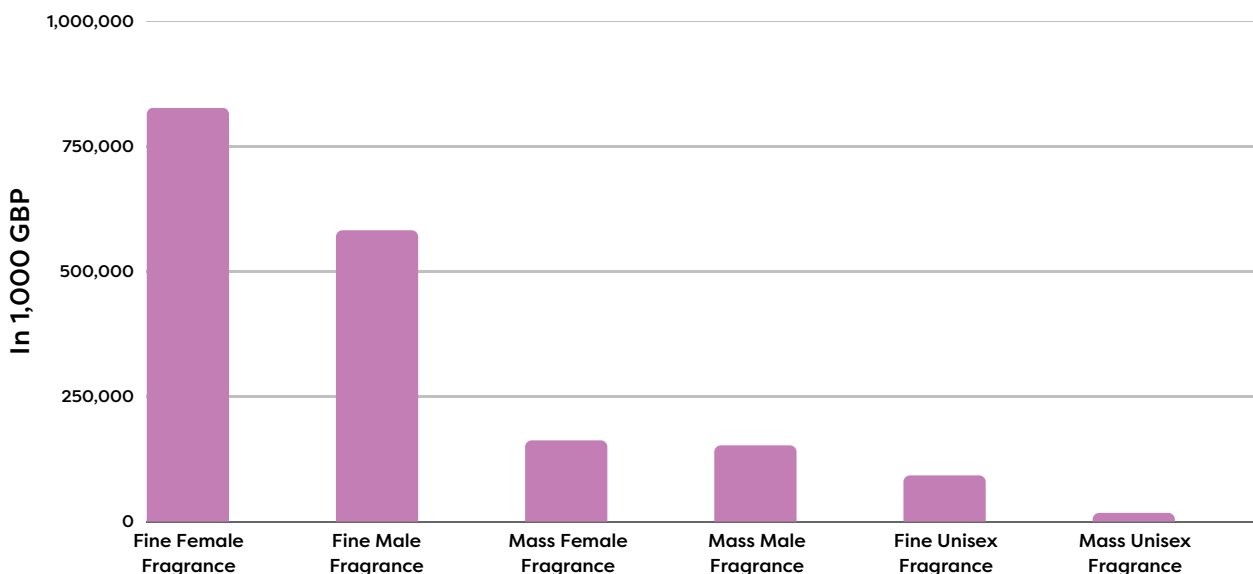
Europe dominates the global market for fragrance sales (32%) along with the US (26%) but South Asia and Oceania (13.7%) will see the biggest increase in sales (6.7% CAGR) up to 2032. This is largely driven by China and a preference for premium products. Globally, sales of eau de parfum outperform eau de toilette and eau fraiche.

The natural segment is likely to expand at a CAGR of 5.8% over the forecast period of 2022–2032. This highlights consumers growing preference for natural essences and oils over synthetic scents. Another trend driving the market growth is sustainable packaging for perfumes, stemming from consumers' awareness of the environmental impact of their consumption habits.

## UK perfume market

Luxury female perfume dominates the fragrance market in the UK, with luxury brands having a significantly higher share of the market compared to mass market fragrances or unisex fragrances. In 2021, fine female fragrance products were ahead of their male counterparts by a big margin, amounting to about 839.4 million British pounds worth of market value. Fine female and fine male fragrance sales together command 60% of the perfume market in the UK.

Market value of fragrances in Great Britain in 2021, by product type



Data in graph from (c) Statista "Fragrance market value by product" published July 2022

Sources:  
Flex MR  
IMARC

Statista - <https://www.statista.com/statistics/289686/market-value-of-fragrances-in-great-britain/>

# 03: The UK fragrance consumer

As we have seen, both the global and domestic fragrance market is dominated by fine female fragrance. Let's take a look at the UK fragrance consumer and understand more about their shopping habits.

## UK shoppers of fragrance products



35% of men use a fragrance at least once a day. 31% used 2-3 times a week and 33% once a week or less.

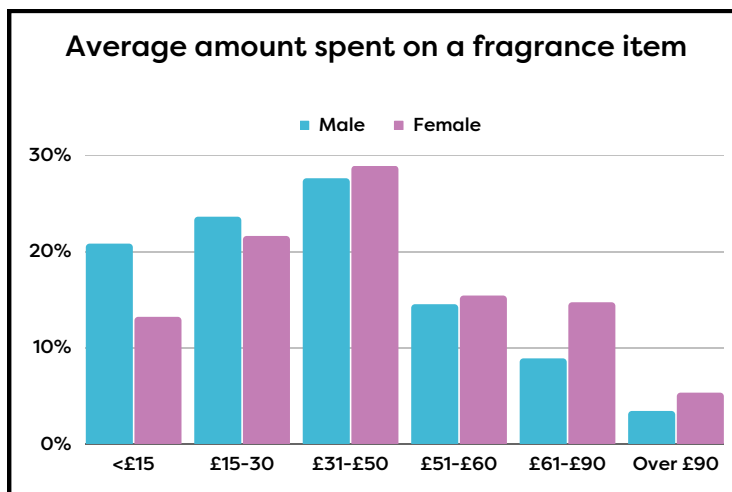


59% of women use a fragrance at least once a day. 21% 2-3 times a week and 19% once a week or less.

When it comes to fragrance items, women shoppers splash the cash more readily than men. This is in keeping with market value data where female fine fragrance dominates.

21% of men will spend less than £15 on a fragrance item compared to only 13% of women. 64% of women will spend £31 or greater on a fragrance product.

Women (29%) and men (28%) spend equally on mid-priced items at £31-£50 range.



### Favourite feminine fragrance

1. Chanel (24%)
2. Dior (18%)
3. Calvin Klein (17%)



### Favourite masculine fragrance

1. Chanel (24%)
2. Diesel (23%)
3. Hugo Boss (23%)

64%

Of women would spend >£31 on a fragrance item

72%

Of men would spend <£50 on a fragrance item

Data from Kantar (c) on use of fragrance, amount typically spent and favourite fragrance brands.

Source:

Kantar TGI - GB TGI - 2022 November (October 2021 - September 2022) - © Kantar

# 04: Purchase or present?

How are fragrances purchased? Do people mainly buy for themselves or do they typically receive them as gifts? Is there a difference between age and gender?

We took these questions to a nationally representative panel to understand a bit more about the path to purchase for parfum, eau de toilettes and aftershaves.

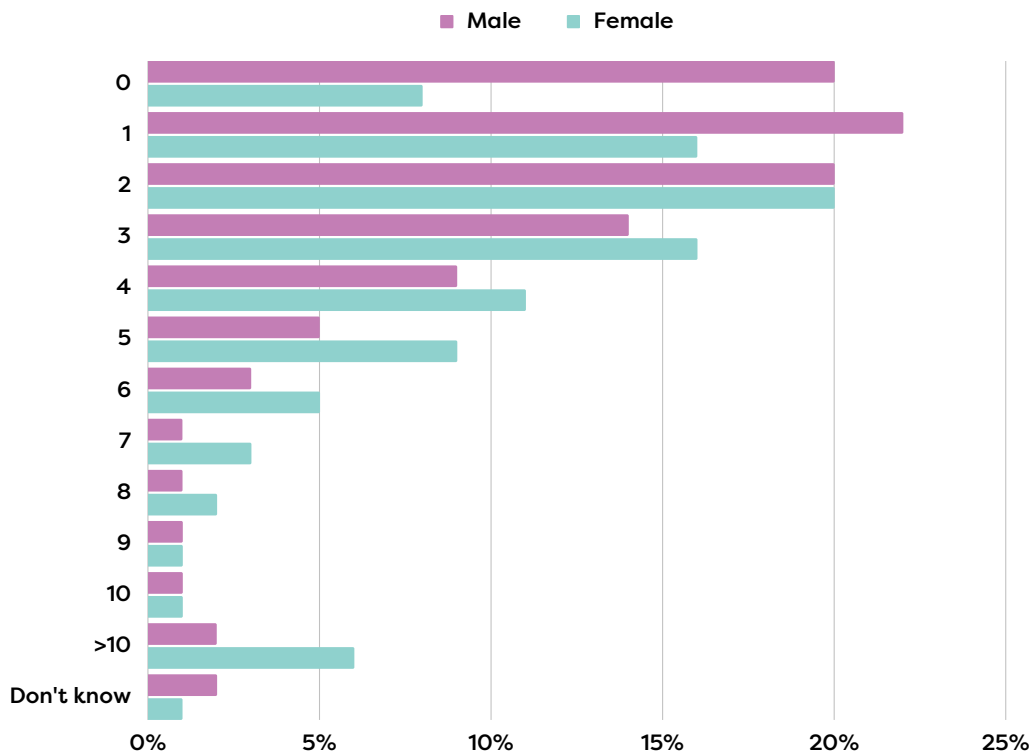
## Fragrance ownership is widespread in the UK

The survey revealed that 85% of UK adults (18 years and over) own 1 or more fragrances. It is most common to have a small collection of fragrances; the average consumer owns at least 1 fragrance (19%) or 2 fragrances (20%). However, 45% of the population own more than 2 fragrances, with 4% indicating they own more than 10! Just 14% of the population say that they do not own a fragrance at all. This shows that fragrance is widespread in the UK.

## Women typically own more fragrance items than men

The median number of fragrances owned by a man is 2 and for women is 3. Women were much more likely to own 10 or more fragrances (6%) compared to men (2%). Conversely, women were much less likely not own any fragrance (8%) compared to men (20%).

For the following question, please think about fragrances/ aftershaves (e.g. perfume, eau de toilette/ parfum/ friache, cologne etc.) excluding body spray/ mists. Approximately, how many fragrances/ aftershaves do you currently personally own?



Graphs: Approximately, how many fragrances/ aftershaves do you currently personally own?

Sources:



All figures, unless otherwise stated, are from YouGov Plc.

2023 Results Total sample size was 2162 adults. Fieldwork was undertaken between 2nd - 3rd February 2023. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).



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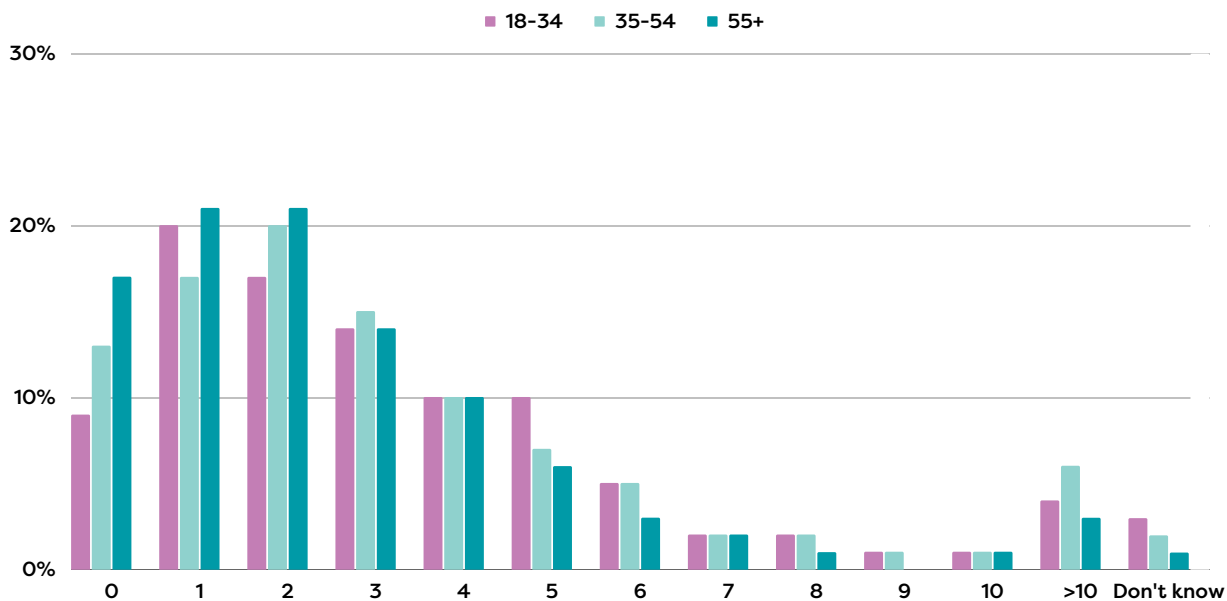
# Purchase or present?

## Fragrance ownership differs across age categories

Only 9% of 18-34-year-old participants (18-24 = 10%, 25-34 = 9%) indicated that they owned 0 fragrances, showing that fragrances are popular with this age group. 50% of this age bracket owned 3 or more fragrances. The median number of fragrances owned by 18-24 year old participants was 3, above the median of 2 for most other age groups. This could show a desire for experimentation at this age and building up a library of scents.

Participants from the oldest age bracket (55+ years) were more likely to state they own 0 (17% compared to 13%) or 1 (21% compared to 19% average) or 2 (21% compared to 20% average) fragrances. They were less likely to own more than 10 (3% compared to 4% average). This indicates that quantity of scents is less important.

For the following question, please think about fragrances/ aftershaves (e.g. perfume, eau de toilette/ parfum/ friache, cologne etc.) excluding body spray/ mists. Approximately, how many fragrances/ aftershaves do you currently personally own?



Five age group categories were aggregated into three age categories for the purpose of this graph

2

The number of fragrance products (ie. eau de cologne) typically owned by men

3

The number of fragrance products (eau de parfum/toilette) typically owned by women

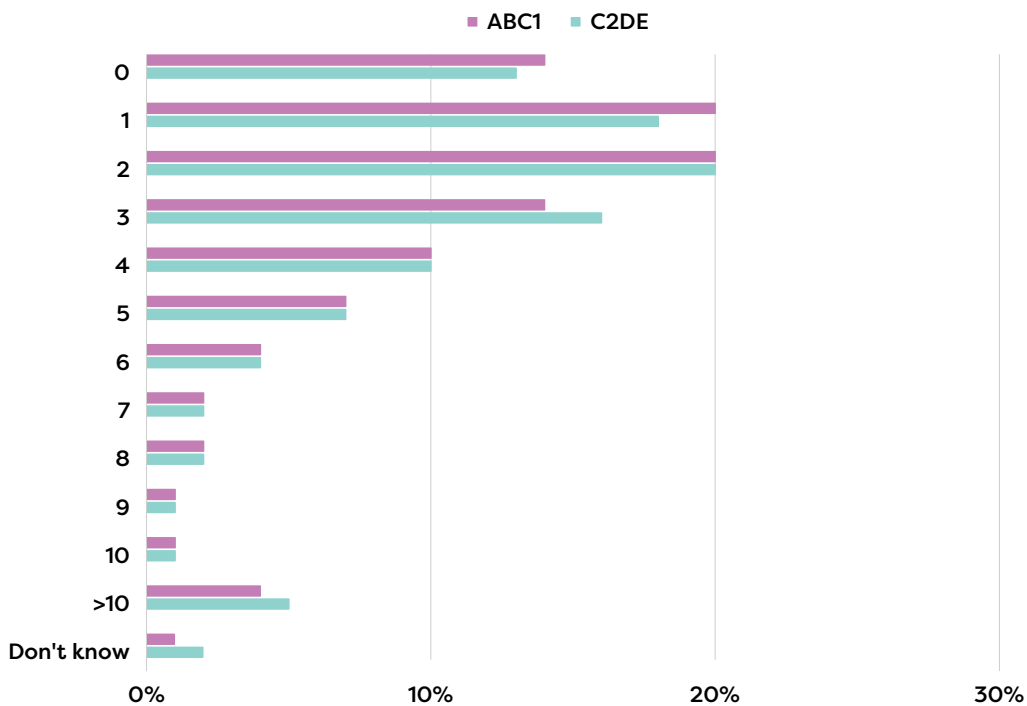
# Purchase or present?

## Fragrance ownership is popular across economic backgrounds

There was little difference in fragrance ownership between ABC1 and C2DE audiences. ABC1 participants were slightly more likely to own 0 fragrances (14% vs 13% C2DE) and slightly less likely to own more than 10 fragrances (4% vs 5% C2DE).

As we have seen from previous chapters, fragrances are often aspirational and consumers are willing to spend money to feel luxurious. Additionally, "buy now, pay later" schemes such as Klarna are making fragrance ownership accessible to more consumers.

For the following question, please think about fragrances/ aftershaves (e.g. perfume, eau de toilette/ parfum/ friache, cologne etc.) excluding body spray/ mists. Approximately, how many fragrances/ aftershaves do you currently personally own?



Owned fragrance by socioeconomic (2023)

85%

The number of 18+ that own 1 or more fragrances.

Graphs: Approximately, how many fragrances/ aftershaves do you currently personally own?

Sources:

**YouGov**

All figures, unless otherwise stated, are from YouGov Plc.

20

2023 Results Total sample size was 2162 adults. Fieldwork was undertaken between 2nd - 3rd February 2023. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).



# Purchase or present?

## Fragrances as a gift

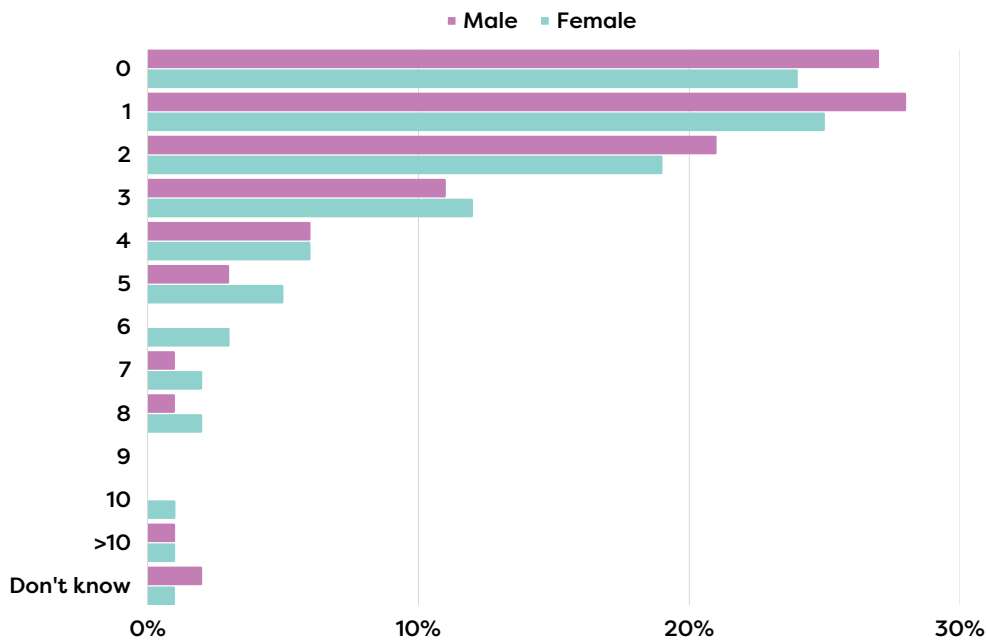
Fragrances can be bought as gifts on birthdays and cultural celebrations such as Valentine's Day, anniversaries and religious celebrations such as Christmas or Eid.

### How many people get gifted a fragrance?

75% of participants have at least one of their fragrances items gifted to them. Just 1 in 4 of participants purchased all of their own fragrances ("0 - None of the fragrances/aftershaves were gifted to me" = 25%)

Men and women both receive a median average of one fragrance as a gift. However, 71% of men and 75% of women have at least 1 or more of their fragrance items gifted to them, showing that women are slightly more likely to receive fragrance as a gift overall.

You previously said that you currently personally own fragrance(s)/aftershave(s)...Approximately, how many of these were gifted to you (i.e. you did not purchase them yourself)?



75%

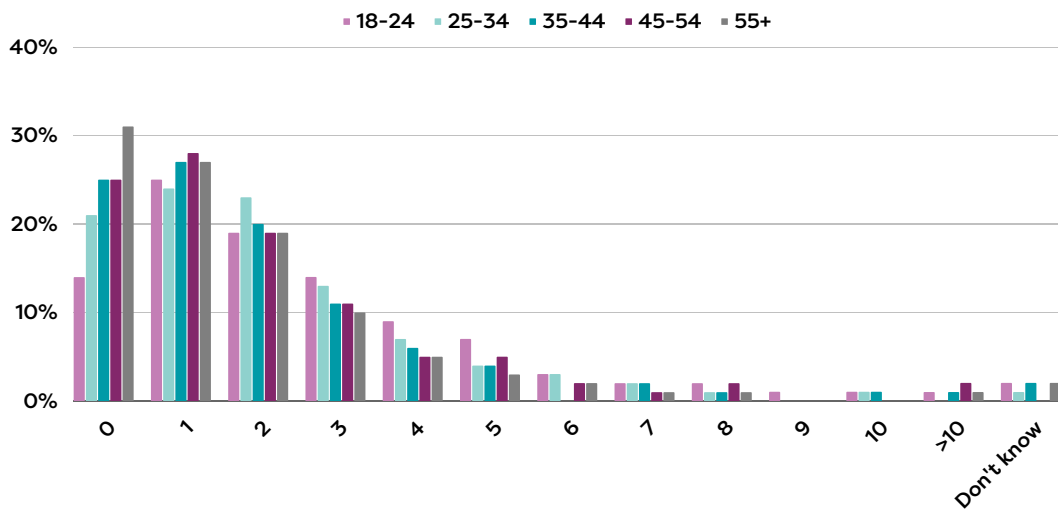
Of people have at least one or more their fragrances gifted to them

# Purchase or present?

## Younger groups most likely to receive fragrance as a gift

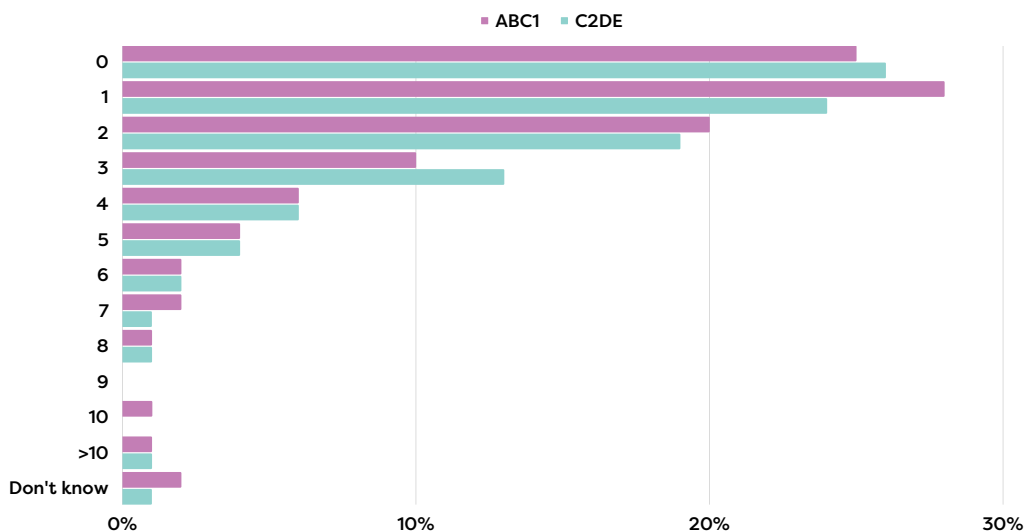
82% of 18-24 year old participants reported that they received more than one fragrance as a gift, compared to 67% of those aged 55 years and older. The over-55s were the most likely to have none of their fragrances gifted to them (31%).

You previously said that you currently personally own fragrance(s)/ aftershave(s)...Approximately, how many of these were gifted to you (i.e. you did not purchase them yourself)? Owned fragrance by age group (2023)



## Little difference between economic backgrounds

There was little difference between economic groups with 73% of ABC1 having at least one fragrance gifted to them compared to 74% of C2DE.



Graphs: Approximately, how many of these were gifted to you (i.e. you did not purchase them yourself)?

# 05: Choosing a fragrance

We know that fragrance is important to people with 85% of UK adults owning at least one fragrance. So how do consumers choose a fragrance?

At Relish Agency we have run many fragrance sampling campaigns. More recently, through our consumer insight and market research product Try.Love.Buy, we have been able to explore the path to purchase and the reasons for choosing a fragrance. Helping to uncover the "why of buy" and complimenting information gained from traditional sales data.

## The why of buy

In a recent exploration of open-text responses to a survey accompanying a premium women's fragrance, we discovered several key themes.

"It smells absolutely lush, I'm in love! A purchase I never realised I needed!"

Theme #1: The scent

### Theme #1 Scent

Unsurprisingly scent was the biggest factor for choice, with the majority of respondents citing enjoying the scent as a reason for purchase.

"It's really nice and feminine, gives a confidence boost right away and makes you feel expensive "

Theme #2: The feeling

### Theme #2 Feeling

The second most dominant theme was around the feeling that the scent gave wearers. Particularly that it made wearers feel expensive.

"The fragrance is different to any other perfume I have."

Theme #3: Uniqueness

### Theme #3 Different

A particular aspect to this scent sample was that it had different notes compared to other scents. A smaller number of respondents were attracted to the uniqueness and individuality the fragrance provided.

"The smell is literally me in a perfume and don't even get me started on the packaging! I am absolutely obsessed, I am definitely going to have to buy this I have fallen in love with it"

Theme #4: Aesthetic

### Theme #4 Aesthetic

Another aspect that attracted buyers was the aesthetic surrounding the bottle design and packaging.

# 06: Sampling Case Studies

Product sampling is a great way to help potential buyers experience the product. This is particularly important with scent, to evoke the emotions and to see how the scent performs on an individual's skin. Indeed, product sampling through spritzing perfume on a passerby in a shopping centre has been a hallmark of the shopping experience for some time.

Nowadays, physical samples can also be distributed directly from a digital request or through a brand partnership with an online retailer, taking advantage of digital footfall in the ever-growing e-commerce market. Here are some case studies from Relish:



## Case Study 1

500,000 samples distributed via online retail partnership  
418% sales uplift  
sold out on site



## Case Study 2

500,000 samples distributed via online retail partnership  
1873% sales uplift  
£87K revenue



## Case Study 3

50,000 samples distributed via online retail partnership  
780% sales uplift  
£34K revenue

Contact us at [team@relishagency.com](mailto:team@relishagency.com) to find out how we can help drive reach and sales through our many product sampling channels and solutions

# 07: Conclusion

We've covered a lot of ground in this report.  
To summarise the findings, please consider these three takeaways...



## The market is dominated by sales of female fine fragrance

- Luxury female fragrances dominate global and domestic fragrance markets. (see page 4)
- Women use fragrance products at a greater frequency than men (see pages 5 and 6)
- Women are typically more willing to spend more on a fragrance item compared to men. (see page 5)



## Fragrance ownership is widespread...

- 85% of UK adults own at least one fragrance product (see page 6)
- The youngest age group (18-24) are more likely to have a fragrance as a gift (See page 10)
- Socioeconomic factors do not appear to have an impact on the number of fragrances owned with ABC1 and C2DE owning a similar number (see page 8)



## Trying is buying

- Sense of smell is closely linked with our emotions through the limbic system (see page 3)
- Experiencing the scent and enjoying it, are important steps in the path to purchase for consumers (see page 9)
- Sampling is an effective way to help consumers try a new scent (see page 10)

# 08: Acknowledgements

This report was compiled using primary data commissioned from YouGov, Kantar and our own research product, Try.Love.Buy. Together with secondary data accessed through desk research from companies listed below:



If you'd like to know more about how we can help bring your campaign to life with data-driven solutions, contact us today!

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