

A Work Project, presented as part of the requirements for the Award of a Masters Degree in  
Management from the Faculdade de Economia da Universidade Nova de Lisboa

# **“How to sell successfully a perfume in the non-selective market?”**

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12<sup>th</sup> June 2009

## **Abstract**

This document presents a market research on the positioning of perfumes in the non selective market. This project's main goal had been to analyze the challenge of "successfully selling a perfume in the non-selective market" in order to propose potential solutions. To address this marketing problem, an exploratory research had been conducted (20 In Depth interviews) along with four semi-structured interviews with market experts to consolidate the consumers' outputs. Although this research had confirmed a high complexity behind consumers' attitudes towards a perfume, we believe there are great opportunities in the non-selective perfumery. As a consequence, we recommend a further study on some of the hypothesis build up throughout this research: on other products to "get perfumed"; on the already strong mass market brand's potential extensions; on the establishment of another way of talking about the perfume and on the replacement of the myth with an absolutely unique idea.

## **Key words**

- Fragrance Market
- Non-selective channel
- Consumers' perspective
- Market expert's perspective

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## 1. Project's purpose: general overview

This Work Project had been developed within my participation in the 17<sup>th</sup> edition of L'Oréal Brandstorm International Marketing Competition. The aim of this challenge is that students compete for the best marketing strategy and communication campaign for one of L'Oréal's international brands. This year, we were challenged to create Maybelline's first fragrance, a L'Oréal's mass-market brand. This marketing strategy and communication campaign had to respect Maybelline's core brand values and its main challenge was to define a way to launch a successful fragrance in Maybelline's distribution channel: the non-selective.

## 2. Case Narrative

### 2.1. Work Project's Context

#### 2.1.1. Theoretical Background

##### The luxury market

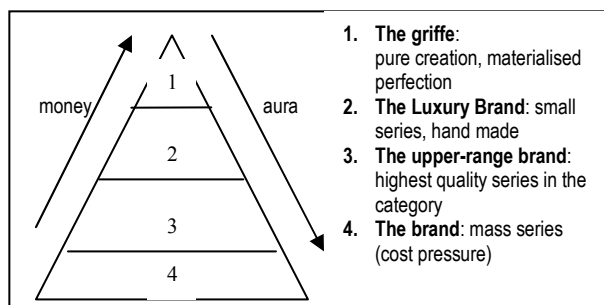
a) **The gap:** "The word "luxury" derives from the Latin *luxatio*, meaning distance: luxury is an enormous distance" (Kapferer, 2008, page 95). When Customers buy a luxurious product or service (where most selective perfumes are positioned), "it is customers' desire to mark their difference" (Kapferer, 2008, page 96); it is supposed to get noticed by others, when using a Dolce Gabanna perfume, customers are not trying to be discreet. Although most perfumes are within reach to a common person (are not Ferrari cars or a Versage suit), they are seen as a way of "bringing a little luxury into ones life" (Kapferer, 2008, page 98) as they are associated with high standard brands. Kapferer suggests this is the reason that sustains people's willingness to pay a higher price for a perfume, its capability of bringing in a kind of a social status and a sense of power.

If on the one hand, luxurious brands positioning is strongly supported by a strong presence in magazines and TV, on the other hand, they are strategically not within reach to everyone. This is where the gap is: between what consumers desire (stimulated through advertisement) and what consumers actually reach (given the difficulty on getting access to the products). All in all, Kapferer

suggests that the success of a luxurious brand requires an inaccessibility dimension (gap) regarding some of the brand's products.

**b) The myth:** “There is a myth shaped around the brand” (Kapferer, 2008, page 98): Gucci's name, for example, is synonymous with Italian craftsmanship, outstanding quality and exceptional beauty and this myth can be spread within other products, “This created the luxury business: to create a myth around inaccessible products” (Kapferer, 2008, page 99) (like Gucci's bags) to hold customer's willingness to pay premium prices for other products of the same brand (like a Gucci's perfume). Most Luxury Brands exemplify this brand extension method “where there is a move from tangible values”: a single product-based promise (glamorous bags) “to intangible values”: a larger brand benefit (exceptional beauty) (Kapferer, 2008, page 98). Regarding this myth's creation, Kapferer suggests a **luxury brand's business model** represented by the **luxury pyramid**:

**Figure I:** The Luxury Pyramid



Source: Kapferer, 2008, page 98

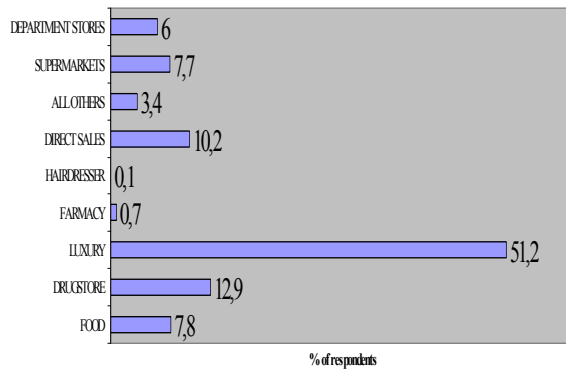
In this model, Kapferer suggests that the preservation of the griffe, around which is build the “myth”, requires huge financial resources assembled through the licensing of the “Mass prestige” production. Kapferer

refers L'Óreal, among others, as an example of an industrial group that “creates, launches and distributes worldwide products at the 3<sup>rd</sup> level”. On the other hand, these expensive and prime quality products only succeed if the 1<sup>st</sup> level's myth is constantly recreated: “the more we buy a luxury brand, the less we dream of it. Hence, somewhat paradoxically, the more a luxury brand is purchased, the more its aura needs to be permanently recreated.” (Kapferer, 2008, page 99)

The sophisticated advertising campaigns behind the luxury brands are also an important mean to reinforce this “aura” where the “pure creation” is communicated to consumers.

### 2.1.2. Distribution of Perfumes

**Figure II:** Channel Preferences to buy a Fragrance (European Fragrance Market); n= 119 548



Source: Ipsos 2007 European Health & Beauty Survey

When analyzing the results of the European Health & Beauty Survey developed in 2007 by Ipsos, it is easy to observe the great importance given to the selective channels (luxury) by feminine fragrance users in the European market

In Portugal, perfumes are distributed within two main channels: selective and non-selective. The selective channel is where luxury brands are positioned, those from high-end cosmetic firms such as Estée Lauder and those from luxury goods companies such as Gucci. The non-selective channel is much more fragmented where brands range from *António Banderas* (from A. Puig) to *Aghata Ruiz de la Prada* (from Perfumaria Gal). Channels like drugstores and department stores are not very common in Portugal like in other European countries. Both pricing and distribution strategies of selective perfumes indicate brand exclusivity (higher prices placed in selective distribution channels such as *Perfumes e Companhia* or *El Corte Inglés*), while non-selective perfumes follow a lower price strategy and are placed in mass market channels (such as Continente or Pão de Açúcar).

## 2.2. Introduction and main objectives

The purpose of this project was to come across the challenge of how to sell successfully a fragrance in the non-selective market. We developed a marketing research in which the main research objective was to understand which and how these barriers could be overcome (turning the mass market into a successful channel to sell a perfume).

## 2.3. Research

### 2.3.1. Methodology

#### 2.3.1.1. Objectives

This research was expected to bring useful insights regarding the following aspects: the key success factors behind the luxury market (where most successful brands of perfume are);

consumers' channel preferences (in Europe); the dynamics behind the perfumery segment in the non-selective channels (in Portugal); consumers' perspectives regarding a fragrance: usage habits, choice process, loyalty levels, buying behavior, expectations and attitudes towards the product and non-selective markets potential and constraints. Finally, although our main objective was to focus on the consumers' point of view, we decided to include in this research perfume brand and non-selective distribution experts' perspectives in order to get a broader view of the problem (given their great experience on the matter).

#### **2.3.1.2. Research Design and chronology**

We initiate this research with a **literature review** in the luxury market. Secondly, some **secondary data** had been analysed: the European Health & Beauty Survey conducted by Ipsos in 2007 and Nielsen's Annual of Drugs of 2007. To assess the consumer perspective, we conducted an **exploratory research** where its main goal was "to provide insights and understanding of the nature of the marketing phenomena" (Malhotra and Birks, 2007), deepened by an **expressive projective technique**. Finally, we conducted four **interviews with market experts**. (For a detailed schedule of this Work Project please see appendix 1).

#### **2.3.1.3. Data collection**

We decided to follow a **qualitative research** due to this matter's in-depth dimensions (classical irrational behaviors) on which we didn't have much information. On the other hand, a **quantitative research** could have been developed afterwards (by testing our hypotheses) but hadn't been done due to time restrictions. We used a **direct approach** for the exploratory research conducting 20 **in depth semi-structured interviews** following an interview guide (see appendix 2) developed previously. The interviews lasted about 1h, were made on a one-to-one basis in a pleasant environment, were recorded and transcribed afterwards. Four **semi-structured interviews** had been conducted with market experts following a different interview guide (see appendix 3)

developed previously. These interviews lasted about 45 minutes, were also made on a one-to-one basis in the office of each interviewee, were not recorded nor transcribed.

### 2.3.1.4. Sampling design and special notes

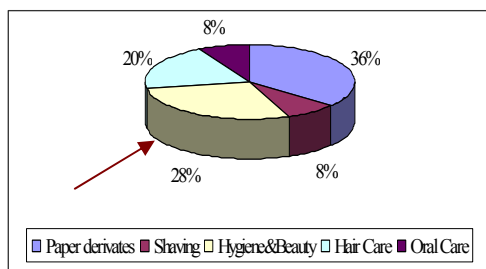
The universe for the exploratory research had been designed to cover three main types of consumers: “Selective Perfume Users”, “Non-selective Perfume Users” and “Perfume’s Substitutes Users” in order to fill in different fragrance usage views. All interviewees were women, between 18 and 40 years old and had, at least once, bought a beauty product in the non-selective market. It is important to refer that the consumers’ quotes (in Consumers’ Perspective section) were kept on their native language (Portuguese) to respect their insights’ true meaning. For the market expert’s contribution, we intended to cover two main professional areas: Perfume’s mass distribution and Perfume’s product management (see appendix 4 – sample design).

This exploratory research didn’t mean to have statistical significance; it was used to reach some hypothesis to be tested in a further research project.

## 2.3.2. Research Results

### 2.3.2.1. Secondary data insights

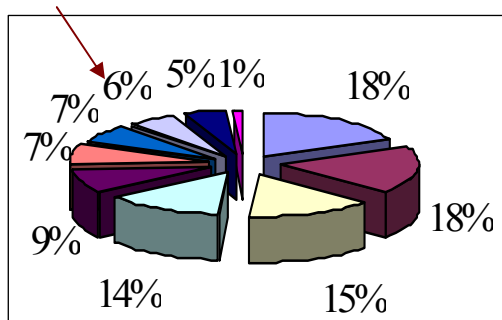
**Figure III:** Categories in the Personal Care sector (weight in value)



In Portugal, according to the 2007 Drug’s Annual done by Nielsen, the “Personal Care” sector in the non-selective channels is divided into five main categories of products.

Source: AC Nielsen’s Drugs Annual 2007

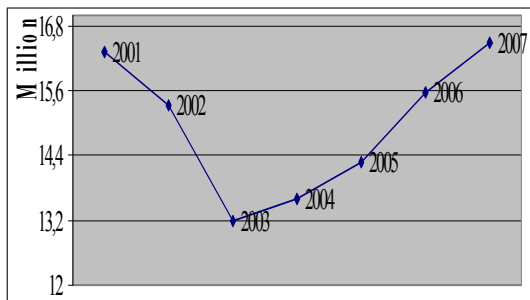
**Figure IV:** Class of products in the Hygiene&Beauty’s category (weight in value)



Non-selective perfumes are included in the “Hygiene and Beauty’s” category and its class of products is named “*água de colônia, eau de toilette and eau de parfum*” representing only **6% of the total sales value** of the category in 2007.

Source: AC Nielsen’s Drugs Annual 2007

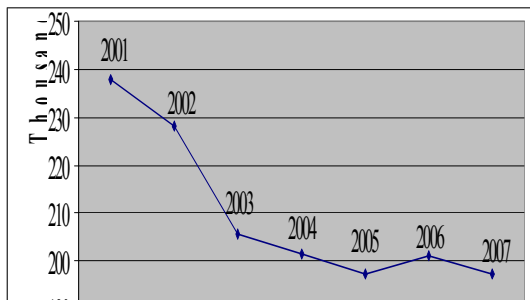
**Figure V:** “Água de colónia, eau de toilette and eau de parfum” sales growth (in value)



Although it corresponds to an insignificant sales value, it had been **growing in value** since 2003 (growing 6% in 2007):

Source: AC Nielsen's Drugs Annual 2007

**Figure VI:** “Água de colónia, eau de toilette and eau de parfum” sales decrease (in volume)



On the other hand, except for the year of 2006, “água de colónia, eau de toilette and eau de parfum” class had been **decreasing in terms of volume** since 2001 (decreasing 2% in 2007):

Source: AC Nielsen's Drugs Annual 2007

### 2.3.2.2. Market Experts perspective

Two Perfume Product Managers had been interviewed: one for a selective perfume: Armani from (L'Oréal) and the other for a non-selective perfume: António Banderas (represented in Portugal by Jerónimo Martins). Moreover, we interviewed both Directors of Perfumery and Beauty Departments of the two main non-selective distribution players in Portugal (one from Auchan and the other from SONAE). Although each expert has its own approach, both professionals from the retailer sector and the António Banderas Product Manager believe there are great opportunities in the non-selective perfumery segment, while the professional working with selective perfume brands, is quite sceptical regarding this opportunity.

#### Main outputs from the Market Experts interviews:

##### A. Crucial success factors to sell a perfume

1. Main selling drivers: the **T.V. Communication** (on the diffusion of the dream), the **divuligation of the perfume's fragrance** (through “spray girls”) and the **innovation** of the concept

**2. Secondary selling drivers: the store's decoration/ environment and the promotion events** developed within the store.

Qualitative output:

“When customers want to buy a perfume they are stimulated by a dream, by the need to feel part off a certain beauty icon or status quo. These intangible values need TV advertisement support.” (Armani's Product Manager)

“António Banderas is the only brand that made T.V. ads within the non-selective perfumery, I believe this is one of the main reasons for its success. (António Banderas' Product Manager)

“Followed by promotions within the store, innovation had been very important for António Banderas' success: through several annual launches.” (António Banderas' Product Manager)

**B. The importance of the MYTH present in the selective channel**

**1. Selective perfumes must be positioned in the selective channel** as it is the only one with the required conditions (its premium positioning and exhibition conditions).

Qualitative output:

“Perfumes are one of the few accessible luxury products to everyone; these are unreachable values that are part of the luxury market.” (Armani's Product Manager)

“If a perfume like Armani would be placed in the supermarket, this would contradict the brand's statement and ruin it, there wouldn't be any coherence with what the brand promises through communication.” (Armani's Product Manager)

**C. Opportunities in the non-selective channel**

**1. Price attractiveness.**

Qualitative output:

“The only strength of the mass market is its ability to exercise lower prices, especially in the recent crisis scenario” (Armani's Product Manager)

“Accessible price is what mainly distinguish António Banderas from other perfumes sold in perfumeries” (António Banderas' Product Manager)

**2. Health & Beauty market's growth potential** in Portugal.

Qualitative output:

“Portuguese woman are buying more and more health and beauty products, there is here a great opportunity that should be also explored by the mass market.” (Auchan’s Director of Perfumery and Beauty Department)

**3. To bring the Mass Prestige concept to the mass market.**

Qualitative output:

“There is an opportunity to bring to the mass the prestige concept: to offer perfumes close to the selective quality standards.” (António Banderas’ Product Manager)

“To reach this lower price, the fragrance structure of a perfume like António Banderas is different from the ones sold on the selective channel with lower lasting abilities.” (António Banderas’ Product Manager)

**4. There’s an opportunity to reach other types of consumers.**

Qualitative output:

“It makes sense to sell perfumes in the non-selective market as we need to think on all types of consumers: in Portugal, there is a great number of people that don’t have access to perfumeries and don’t have purchase power to buy them.” (António Banderas’ Product Manager)

“In the supermarket, lower purchase power clients don’t feel any constraint or feel forced to test and choose the perfume, they feel free to buy when they are able to spare that money.” (Sonae’s Director of Perfumery and Beauty Department)

“In less urban areas, the hypermarket might be one of the few places where people have access to Health & Beauty products.” (Auchan’s Director of Perfumery and Beauty Department)

**5. Convenience:** to be in the place where people can buy everything.

Qualitative output:

“Being next to all other products bought by people on a daily basis can complement supermarket consumers Hygiene & Beauty’s “cabaz de compras”.” (António Banderas’ Product Manager)

“Most people are becoming more and more busy, with ought much time to go shopping, we try to offer everything people need on the same place.” (Auchan’s Director of Perfumery and Beauty Department)

**6. “Trading up” tendency during crisis scenario (within the mass market)**

Qualitative output:

“Many clients stop going to the selective stores and substitute these selective products by the most expensive ones sold in the mass market.

(Auchan’s Director of Perfumery and Beauty Department)

**D. Barriers in the non-selective channel**

**1. No exhibition conditions.**

Qualitative output:

“There are really tight regulations within all mass retailers in what concerns space display, damaging one of the most important “musts” for perfume brand’s: strong exposition. The perfume launches are a good example.” (António Banderas’ Product Manager)

“People don’t go to the supermarket looking for these intangible values, there’s no environment.”

(Armani’s Product Manager)

**2. Very difficult to compete with the selective market:** shelf space, brand image and financial ability to invest on TV.

Qualitative output:

“I don’t consider the non-selective market a threat for the selective one. The Perfume Market is dominated by the selective perfumes while the non selective ones represent an insignificant weight.”

(Armani’s Product Manager)

“The importance of the Brand on the Perfume Market is our main weakness when compared with the selective, very difficult to compete with.” (António Bandera’s Product Manager)

“There is a great marketing strategy behind the selective perfumes, strongly supported by T.V. advertising campaigns, most mass market perfume brands don’t have this financial capability.”

(Sonae’s Director of Perfumery and Beauty Department)

**3. The importance of branding in Portugal, a very clear prejudice regarding less prestigious brands.**

Qualitative output:

“We’ve conducted a Blind Test in Portugal last year and the importance given to the brand behind each fragrance was straightforward. Many people preferred mass brands while they had their eyes hidden.” (António Bandera’s Product Manager)

#### 4. Robbery.

##### Qualitative output:

“It’s very difficult to avoid robbery in a free service shopping environment. Products like perfumes represent a great loss every time we face this situation.” (Sonae’s Director of Perfumery and Beauty Department)

### E. Possible solutions to overcome these barriers in the non-selective channel

#### 1. Change the perfumery linear and bring the customer to the category.

##### Qualitative output:

“The “looks” of the linear could be enhanced and enlarged, to be more aligned with the selective and more sampling actions could be made.” (António Banderas’ Product Manager)

“The high growing rates of the non-selective perfumery segment are starting to convince retailers to invest in a more adequate selling environment where each perfume brand could be much more enlightened. This is already happening with make up, you should go and check Continente in Almada, Lisbon.” (Sonae’s Director of Perfumery and Beauty Department)

#### 2. To empower the **promotional coffrets** (during Christmas and other special days).

##### Qualitative output:

“There is a sales boost during Christmas on this category, where many customers buy *coffrets* to offer, here is a great opportunities to bring more customers to the category.” (António Banderas’ Product Manager)

#### 3. To align Perfumes with other products used to “feel fresh and clean” (already a success in the mass market).

##### Qualitative output:

“The “women shopper” (the most important mass market’s customer) already buys products like soap, deodorizing, face cream and body lotion as part of their fragrance. These “hard sellers” could push their loyal customers to this category.” (Sonae’s Director of Perfumery and Beauty Department)

#### 4. To **align Perfumes** with other products' **categories**.

##### Qualitative output:

“One of the main selling drivers of non-selective perfumes is the fact that they are associated with other product categories in order to gain brand synergies (Adidas, Ruy de la Prada, Springfield, Pull and Bear...” (Sonae’s Director of Perfumery and Beauty Department)

#### 5. To **invest in communication and placement** to leverage Brand Image.

##### Qualitative output:

“Consumers in Portugal still value a lot the branding effect and are very sensible to the “dream” sold and supported by T.V. advertising campaigns, specially in this category.” (Auchan’s Director of Perfumery and Beauty Department)

“The perfume supplier needs to reach its consumer outside the supermarket through advertising and inside the supermarket through product detachment investments. (Sonae’s Director of Perfumery and Beauty Department)

#### 6. **Brands’ extension to perfumery** made by already strong brands.

##### Qualitative output:

“The non-selective perfumery will only succeed if already strong brands enter in this segment to give the required credibility to the segment and stimulating great improvements on the display space. This is also what had been happening in make-up with Maybelline, Bourgoise or Olay.” (Sonae’s Director of Perfumery and Beauty Department)

#### 7. Retailer’s client **loyalty cards** - 50% discount leaflets

##### Qualitative output:

“One of the most important selling drivers on many categories is the placement of products in the 50% discount leaflets provided through our client card usage.” (Auchan’s Director of Perfumery and Beauty Department)

### 2.3.2.3. **Consumers’ perspective**

#### **Main outputs from the Market Experts interviews:**

Please see appendix 5 to see consumers' additional quotes.

### A. Purchase decision

1. Most interviewees (**under 30**) **rarely buy a selective perfume**, it is usually offered (boyfriend, parents, godfather...)

#### Qualitative output:

"...o meu padrinho normalmente oferece-me no Natal, sempre diferente, eu costumo gostar"  
(selective perfume user, 29 years old)

"...Eu compro Colónia. Um perfume, só oferecido." (selective perfume user, 18 years old)

2. Some interviewees (under 30) had **already bought a perfume as a gift**

#### Qualitative output:

"Sim, ao Gonçalo." (selective perfume user, 26 years old)

"Sim, ao Bernardo, decidimos juntos depois de experimentar e ver uma publicidade. E à minha mãe, um que eu sabia que ela gostava. NÃO ARRISCO. (selective perfume user, 40 years old)

### B. Moment to buy

3. The **ones that buy their perfume** buy when the perfume **bottle ends** and only **if** there is opportunity to spend that amount of money.

#### Qualitative output:

"1/ ano - quando acaba, compro o próximo (outro)" (selective perfume user, 35 years old)

"Quando sinto que posso gastar dinheiro." (selective perfume user, 24 years old)

4. When buying a perfume, some **buy other products together with the perfume.**

#### Qualitative output:

"Sim. Compro sempre aquelas promoções que oferecem os cremes e gel de banho, etc."  
(selective perfume user, 40 years old)

### C. Place to buy

5. The **great majority** goes to the **selective channel** to **buy** or **test** their perfumes.

#### Qualitative output:

"Não compro, mas para EXPERIMENTAR vou à SÉPHORA. A minha mãe compra no AEROPORTO, a minha AVÓ compra no P&C." (selective perfume user, 21 years old)

“Experimento e compro na COMPANHIA DOS PERFUMES (Cascais Villa) e na SEPHORA (Chiado).” (selective perfume user, 31 years old)

**6. Some interviewees had already thought to buy a perfume in other category channel.**

Qualitative output:

“Recentemente pus hipótese comprar o da ZARA” (non-selective perfume user, 20 years old)

#### **D. Attitudes towards the perfume's price**

**7. Most selective perfume users are willing to pay a higher price, if it's too low they tend to distrust the perfume.**

Qualitative output:

“Não compraria a um preço muito baixo. Gosto de comprar aquilo que eu gosto, não vou pelo preço.” (selective perfume user, 27 years old)

“Se Gostasse do cheiro sim. Tinha que o TESTAR primeiro (tenho imensas ALERGIAS) e que a EMBALAGEM me fizesse acreditar na MARCA.” (selective perfume user, 24 years old)

**8. Most non-selective perfume users and perfume's substitutes users are very sensitive to the price.**

Qualitative output:

“Compro sempre de preço baixo - água de colónia” (non selective perfume user, 18 years old )

“Compraria, já usei um de cereja e não era nada caro. Adorava.” (perfume's substitutes user, 26 years old)

“Sim, por isso é que escolho água-de-colónia e os cremes da NIVEA.” (non-selective perfume user, 21 years old)

**9. Price, a rational (tangible) indicator, most interviewees associate QUALITY to a high price.**

Qualitative output:

“Quando a pessoa gosta, não importa o preço: 40€” (selective perfume user, 29 years old)

“15€ - preço da ZARA” (non-selective perfume user, 19 years old)

#### **E. Non-selective markets potential and constraints**

**10. Non-selective perfume users** interviewed go to the **supermarket** to buy their **eau de cologne** and other “**products to feel fresh and clean**”.

Qualitative output:

“É no SUPERMERCADO que eu compro a colónia” (non-selective perfume user, 24 years old)

“Compro tudo o que é cremes para o corpo, no fundo, são o meu perfume.” (perfume’s substitutes user, 27 years old)

**11. Some** selective perfume users interviewed **wouldn’t mind to buy** their perfume in the **supermarket**, but is something they had never thought about

Qualitative output:

“Perfume nunca comprei, mas já comprei água-de-colónia. Se desse para EXPERIMENTAR, experimentava. Mas nunca iria de propósito ao SUPERMERCADO para isso.” (selective perfume user, 31 years old)

“Não teria nenhum problema se houvesse lá o meu perfume, compro lá cremes, etc, há coisas ótimas” (selective perfume user, 28 years old)

**12. Most** selective perfume users interviewed **would not go to the supermarket** to buy a perfume

Qualitative output:

“Nunca reparei neles. Acho que não funciona nos SUPERMERCADOS. Eu acho que o que resulta nos perfumes é o estarem associados a MARCAS BOAS, ninguém tem uma mala GUCCI, mas podes ter um perfume.” (selective perfume user, 35 years old)

“Associo a marca branca - não compraria.” (selective perfume user, 26 years old)

“Pode vender perfumes bons, mas eu não compraria. Porque o BOM não está dentro do SUPERMERCADO, está numa perfumaria.” (selective perfume user, 40 years old)

**13. Most** selective perfume users interviewed had **never even notice the perfumes** sold in the **supermarket**, they just know they are there.

Qualitative output:

“Não estou a ver quais são. Imagino que hajam.” (selective perfume user, 18 years old)

“Nunca reparei nos perfumes.” (selective perfume users, 21 years old)

**14. Most interviewees** describe them as **less expensive** and **low quality brands**.

Qualitative output:

“São marcas menos conhecidas, mais águas colónias. Já comprei um que adorei, de cereja.” (selective perfume user, 24 years old)

“MAIS BARATOS. Quem compra são os mais jovens com pouco poder de compra.” (selective perfume user, 35 years old)

“Não são marcas boas.” (perfume’s substitute user, 20 years old)

**15. Most interviewees buy other products in the supermarket to get PERFUMED**

Qualitative output:

“cremes NIVEA para o corpo, desodorizante.” (selective perfume user, 29 years old)

“Cremes, vernizes.” (perfume’s substitutes user, 18 years old)

“Cremes, vernizes, água de colónia e maquilhagem.” (non-selective perfume user, 19 years old)

**F. The ideal store environment to buy a perfume**

**16. Most selective perfume users give importance to the length, brands display, cleanness, comfort ability and presentation of the store.**

Qualitative output:

“Marcas organizadas, tem que ter luz e tem que ter um ar "clean". Gosto muito da Sephora, tem as marcas todas e tem tudo bem organizado.” (selective perfume user, 35 years old)

“Bom atendimento, VARIEDADES de perfumes, um sítio onde a pessoa se sintam bem para comprar.” (selective perfume users, 29 years old)

**G. Perfume T.V. Advertising campaigns**

**17. Every interviewee recall straightforward at least one T.V. spot**

Qualitative output:

“CACHAREL, mulher bem vestida, torre de flores, cenário surreal, marcas associadas à moda” (perfume’s substitutes user, 23 years old)

“DOLCI GABANA com a Gisele (com um ar muito natural).” (selective perfume user, 28 years old)

**H. The ideal perfume**

During the In Depth Interviews we recall to an **Expressive projective technique** in order to understand hidden truths about what consumers idealize around a perfume. When the interviewees were asked to describe their ideal perfume, the main dimensions pointed out were:

**18. The type of **fragrance** (detailed and subjective characterization).**

Qualitative output:

“SIMPLES, um bocado DOCE (meio de bebê). Que não fosse muito intenso,” (non-selective perfume user, 21 years old)

“CHEIRO: fresco mas que FIQUE (ex: DKNY) que me lembre o VERÃO e leve” (selective perfume user, 27 years old)

**19. The fragrance’s **ability to impress others** and **to express ones self**.**

Qualitative output:

“que se passasse uma ARAGEM se sentisse.” (non-selective perfume user, 20 years old)

“DIFERENTE, que esteja sempre à mão” (selective perfume user, 19 years old)

“Que chama-se a ATENÇÃO das MULHERES.” (selective perfume user, 40 years old)

**20. The fragrance’s **bottle design**.**

Qualitative output:

“EMBALAGEM: várias, vários usos: uma que dê para pôr na mala.”(non-selective perfume user, 20 years old)

**21. The fragrance **durability**.**

Qualitative output:

“FRESQUINHO como a colónia mas que DURASSE (non-selective perfume user, 24 years old)

“FRESCO e que DURE.” (perfume’s substitute user, 27 years old)

## **I. Brand Loyalty**

**22. Most interviewees are loyal to a brand **just for a certain period**; they like to change.**

Qualitative output:

“Já fui mais. O Perfume dura-me 7 meses, uso até ao fim. Quando acaba ou me dão um diferente ou volto a comprar se me derem a escolher” (selective perfume user, 21 years old)

“A mudança de estação faz-me apetecer mudar de perfume (BLUE - verão, mais água de colónia)” (selective perfume user, 29 years old)

**23.** Most selective perfume users interviewed **change** perfume when **someone offers** them a different one or when they **taste one they like** (in the store or through friends)

Qualitative output:

“Que uma amiga cheirasse bem e que me levasse a experimentar...” (selective perfume user, 18 years old)

“Quando me oferecem um que eu goste. Ou quando me dão a experimentar um que eu goste.”  
(selective perfume user, 26 years old)

### **J. Choice of the Perfume**

**24.** Most interviewees said they choose mainly **by the fragrance**

Qualitative output:

“Pelo cheiro principalmente.” (selective perfume user, 21 years old)

**25.** Great importance given to the **BRAND** behind the perfume

Qualitative output:

“Pelo CHEIRO de MARCAS que eu já conheço. Raramente experimento outras marcas (vou directa às marcas que eu gosto: ARMANI, CK...)” (selective perfume user, 40 years old)

**26.** Some give great importance to the **store’s assistant** when choosing a perfume

Qualitative output:

“Aconselho-me com alguém da loja, dou-lhe as características (posiciono-me nas marcas: nem de senhora nem “teen”). Dentro das que ela me aconselha, arrisco nas marcas que eu conheço e confio - Clinique eu confio, mais facilmente escolho essa” (selective perfume user, 29 years old)

**27.** Some get upset with the **store’s assistant** when choosing a perfume

Qualitative output:

“Irrita-me. Gosto que estejam disponíveis (PERGUNTAS TÉCNICAS) mas que não me chateiem.” (selective perfume user, 18 years old)

“Não. Eu quando vou comprar eu sei o que eu quero.” (selective perfume user, 35 years old)

**28. Top 10** is also an important factor

Qualitative output:

“Reparo no TOP DE VENDAS (considero-os bons). (selective perfume user, 31 years old)

**29. Important to be where it can be TESTED** (Corte Inglês is the main “tester”)

Qualitative output:

“Ando sempre à procura do perfume IDEAL. Demoro imenso tempo a escolher: experimento imensas vezes (na pele), se durar e se eu gostar mesmo compro mesmo.” (selective perfume user, 35 years old)

“Vou passando nas lojas e experimentando. A SENHORA DA LOJA deu-me a experimentar um óptimo que eu comprei.” (selective perfume user, 29 years old)

**30. Advertisement** also influences the choice of a perfume

Qualitative output:

“A Publicidade também influencia. Posso identificar-me ou não.” (selective perfume user, 21 years old)

“...de vez em quando passo pelas perfumarias, vou experimentar as marcas que me lembro de anúncios” (selective perfume user, 24 years old)

**31. When is a gift**, some consumers **also choose** which one they will be offered.

Qualitative output:

“Normalmente compram o que eu uso, vou experimentar antes e depois peço um específico. (selective perfume user, 26 years old)

“No Natal ou nos anos. Eu peço um específico. (selective perfume user, 18 years old)

“Eu digo qual é que eu gosto.” (selective perfume user, 19 years old)

## **K. Fragrance usage**

**32. Most of perfume users** interviewed uses perfume **1-2 times a day**.

Qualitative output:

“Uso todos os dias de manhã e outro à noite” (selective perfume user, 27 years old)

**33. Most interviewees use fragrance as a way to express themselves.**

Qualitative output:

“Uso para me sentir bem, confiante ao pé das outras pessoas” (perfume’s substitutes user, 26 years old)

“Para evidenciar o meu lado positivo” (non-selective perfume user, 21 years old)

**34. Most perfume users use more than one perfume: 1 more light 1 more intense**

Qualitative output:

“uso um mais fresco durante o dia e um mais intenso para ir jantar fora ou para ir a festas” (selective perfume users, 35 years old)

“Quando vou a um encontro especial uso um mais forte” (selective perfume user, 29 years old)

**35. Some interviewees don’t use selective perfumes, they prefer other “ways of perfuming”**

Qualitative output:

“Tenho aversão a ter sempre o mesmo cheiro, é impessoal, e o gel de banho, champoo e cremes já são muitos cheiros” (perfume’s substitutes user, 27 years old)

“prefiro água de colónia, posso estar sempre a pôr e é levezinho” (non-selective perfume user, 24 years old)

“Os perfumes são estupidamente caros, gosto de cheirar bem e até gostava de usar um perfume bom mas o preço excessivo não justifica” (non-selective perfume user, 21 years old)

**36. Most interviewees distinguish a perfume from an eau de cologne by its concentration and lasting abilities**

Qualitative output:

“mais barato, mais leve e fresco e que não dura nada mas que se pode estar sempre a pôr” (selective perfume user, 18 years old)

“DURA MENOS que um PERFUME. ÀGUA DE COLÓNIA (praia, campo, em casa)” (non-selective perfume user, 19 years old)

#### **L. Most important characteristics of a Fragrance**

**37. The great majority says the FRAGRANCE is the most important feature of a perfume”**

Qualitative output:

“CHEIRO: ponto intermédio na intensidade (não demasiado forte, odeio pessoas impestadas) nem demasiado fraquinho , deve ter alguma coisa de masculino (alguma acidez, tipo aftershave), não gosto dos demasiado doces, enjoativos e flores” (selective perfume user, 29 years old)

**38. Other important characteristics: bottle design, to last and to have other’s approval.**

Qualitative output:

“frasco bonito...” (selective perfume user, 18 years old)

“é importante que se FIXE NA PELE. Que não seja demasiado intenso mas que se note” (selective perfume user, 31 years old)

“...que as pessoas ao meu lado gostem” (26 years old)

**39. What make most people dislike a perfume is “to be too intense” or “too sicken”**

Qualitative output:

“cheiros que me ENJOA, a detergente, não gosto de cheiro a FLORES nem ENJOATIVAS” (non-selective perfume user, 21 years old)

“Não gosto dos PERFUMES À VELHA (muito fortes)” (selective perfume user, 26 years old)

**40. Other “disliking characteristics” are expensiveness and low quantity on the bottle.**

Qualitative output:

“Ser demasiado caro. (non-selective perfume user, 18 years old)

“O facto dos frascos serem muito bonitos mas muito pequeninos continuando a ser caros” (selective perfume user, 19 years old)

## **2.4. Conclusions and recommendations**

After carefully observing the above research outputs, we were able to confirm the complexity behind consumers’ attitudes towards a perfume: although the “scent” of the fragrance and its “lasting capabilities” are explicitly the most valued features, the main reasons behind the usage of a fragrance are very irrational and very difficult to build behavioural models. Attached to a perfume there are mainly pure intangible associations: “way to express ones self”, “way to fulfil ones inner self” and “way to impress others in a positive manner”.

It had been also consensual that there are certain **key success factors** that must be followed in order to have a successful Perfume: a Dream within the perfume (where all intangible values are positioned), the importance of the Brand behind the Perfume, the Fragrance itself (to be fresh and at the same time durable), the possibility to be tested (consumers need to test the fragrance before choosing/buying the perfume), the T.V. advertising of the perfume brands (the only advertising medium capable to pass such subtle message), the store environment, to be innovative all the time and the consumers recognition of 4 types of perfume concentrations (Parfum, Eau de Parfum, Eau de toilette and Eau de Cologne).

Having in mind these key factors, we developed five hypotheses to overcome our marketing problem: “How to sell successfully a Fragrance in the non-selective channel”:

**1<sup>st</sup> HYPOTHESIS: To place current selective brands in the non-selective channel:**

It had been shown, through Kapferer’s literature review on the luxury market’s critical success factors (2008), that it doesn’t make sense to place current selective perfume brands in the non-selective channel. These brands’ success depends on the transmission of a dream shaped through “the myth created around other inaccessible products”. This “gap” built through the “inaccessibility” dimension is only sustainable if these perfumes are aligned with the unreachable products’ positioning: selectiveness.

Moreover, as the Armani’s Product Manager stated during the Interview, this placement move would “contradict the brand’s statement and ruin it, there wouldn’t be any coherence with what the brand promises through communication.”

Finally, from the consumers’ point of view, we are also able to reject this hypothesis when interviewees point out the exclusivity they look for when they are choosing or buying a perfume. This strategic move could bring an instantaneous sales boom (due to the consumers’ perception of an opportunity to get a lower price) but, in the long run, would ruin these brands’ sophisticated myth: what sustains their success. All in all, the solution to our marketing problem cannot be sustained by

a strategic move of the selective brands from the selective channel to the non-selective one. The mass market's core business is not the "bringing a little luxury into ones life".

### **2nd HYPOTHESIS: The opportunity on other products to "get perfumed"**

During this analysis, we realized that consumers already recall to many other ways to perfume themselves (the three types of consumers). Body lotion and deodorizing are the main products used to fulfil this "other ways of perfuming" need. Moreover, consumers use to buy these products in the non-selective channel and they are quite loyal to specific mass-market brands like Nivea or Dove.

If on the one hand, "perfuming" is just a tangible dimension behind the usage of a Perfume, among many other intangible dimensions much more important for consumers (like the ability to detach oneself given by the selective perfume brands). On the other hand, we believe these brands, in which consumers already trust, have a very strong positioning that brings to consumers other intangible dimensions like "skin care" or "femininity".

Obviously, for selective perfume users, these products don't have the ability to substitute the current perfume but they are the elected option for both "perfume's substitutes users" and "non-selective perfume users" (together with the Eau de cologne also bought in the supermarkets). These products' ability to perfume is already part of many women's daily fragrance and their perfuming ability could be empowered in the store.

### **3rd HYPOTHESIS: Mass market brand's extension to the non-selective perfumery**

This perfuming empowerment could go even further if already strong mass market beauty brands decided to extend their products to the non-selective perfumery segment. As the Sonae's Director of Perfumery and Beauty Department stated during the interview: "the non-selective perfumery will only succeed if already strong brands enter in this segment to give the required credibility to the segment and stimulating great improvements on the display space". This brand extension had been our great challenge while participating in this years' Brandstorm Competition (promoted by L'Oréal): to create Maybelline's first fragrance, a make-up mass-market brand. During

the development of our marketing strategy, we realized that Maybelline had the power to stretch its brand to this segment as this strategic move could not only leverage the brand but could also give the so need credibility to the non-selective channel. Current Maybelline's consumers, already emotionally involved with the brand (in make up), could be brought to the Perfumery segment.

On the other hand, the strategic purpose of this Maybelline's Perfume wasn't to compete directly with the selective brands sold in perfumeries. As we could realize during this study, In Portugal there is a great gap between the selective and non-selective channels, thus there's here a business opportunity that non-selective channels could grab. This Maybelline's perfume would take advantage of the growth rates and dynamism of this segment and Mabylline's strong T.V. advertising investments would support this strategic move and empower it.

This is already happening in the male perfumery segment, brands like Adidas and Nike extended their products to perfumery and this extension brought many male consumers to the perfumery segment. All in all, we believe there is a great opportunity on this hypothesis: on bringing consumers to the category and, in the long run, could motivate the development of the perfumery in terms of store environment (what is already happening in make up).

#### **4th HYPOTHESIS: Create another way to perfume (compatible with the mass-market)**

Once consumers only recognize four main types of perfume concentrations (Parfum, Eau de Parfum, Eau de toilette and Eau de Cologne), one of our team's breakthrough within the Brandstorm's strategy was to invent a totally new way of perfuming: an Eau d'éclat (meaning enlightening *water*). This new perfuming concept would, on the one hand meet the innovation key success factor in the Fragrance Market and, on the other hand, would create a different segment within the Fragrance Market, avoiding a direct competition with the other types of perfume concentrations already positioned in the selective channel. Furthermore, this eau d'éclat would create a new usage for the consumer, different from the classic perfume: to be part of the "day to day" beauty products usage (along with deodorising, body lotion, etc).

All in all, we also consider there are great opportunities on this hypothesis in which many mass market brands (in the Beauty Sector) could take advantage.

#### **5th HYPOTHESIS: replace the myth with an absolutely unique idea**

The last hypothesis we developed had been based on Kapferer's "luxury pyramid" (page 2) in which we believe "the myth created around other inaccessible products" could be replaced by another kind of myth; different from the one that sustains the luxury business. This myth could be a unique story that would destroy people's prejudices regarding the perfume brands sold in supermarkets. We believe this is what is already happening in the non-selective perfumery for children. Brands like Winks or Nody are having a huge success as children don't have these kinds of prejudice like adults have. There is this "great history" that forms a myth and drives children to desire it. They see it at the supermarket when they go with their parents and they just want to have it. On the other hand, their parents, given its price attractiveness, don't see any constraints on buying it.

Obviously, when directed to adults, this "story" or "unique idea" would have to be much more powerful and strongly advertised but we believe there are great opportunities in this "unique story" development.

### **3. Questions for further research**

All the hypothesis we recommend above are merely theoretical suggestions as we didn't had the opportunity to go deeper on a quantitative research. We would then suggest, for a further research project, a quantitative study to test this hypothesis veracity. Throughout this Working Project, we realized that, although there are many constraints, the non-selective perfumery is very dynamic and it seems that only a few manufactures are investing in it. If stronger brands would do it, the category would be developed and, consequently, the store environment would be enlightened and consumer's willingness to buy perfumes in the supermarket could be enhanced.

## 4. Limitations of the Work Project

Our first limitation had been the difficulty on attaining the profile of the actual consumer of perfumes sold in the non-selective channels. The market experts interviewed just gave us some “lights” about this consumer (they couldn’t provide any studies about it due to professional confidentiality). We also did a one day “in store observation” (in Continente of Alfragide) to identify this consumer but, during our observation, no one bought any perfume. This limitation enabled us to get deeper into this consumer’s perspective that would be essential for the project.

Moreover, if on the one hand, my participation on this years’ Brandstorm competition gave me the possibility to get many insights for this Work Project, it was too focused on a specific brand case study (Maybelline) with its own specificities and, its intensiveness caused some time constraints to go deeper into the research. Finally, the fact that this qualitative research doesn’t have statistical significance weakens our conclusions that would have to be tested in a further research project.

## 5. Bibliography

- (1) **Kapferer, J.N.** , 4<sup>th</sup> edition 2008, *The New Strategic Brand Management* ,Kogan Page ,U.K.
- (2) **Malhotra N, Birks D.**, 2007,*Marketing Research - an applied approach*. Harlow: Prentice Hall
- (3) **AC Nielsen**, *DRUG’s annual report of 2007*
- (4) **European Health&Beauty Survey**, developed by IPSOS in 2007 (2009’s L’Óreal BrandStorm resource pack)

## 6. Appendixes

Appendix 1: Research Chronology

Appendix 2: Consumers’ Interview guide

Appendix 3: Market Experts’ Interview guide

Appendix 4: Sampling Design

Appendix 5: Consumers’ additional quotes

# APPENDICES

# APPENDIX 1

## Research Chronology

**Figure I:** Detailed schedule for this Working Project

		2009					
Task name		Jan	Feb	Mar	Apr	May	Jun
Literature Review		■					
Proposal and Interview guides			■				
In Depth Interviews with Consumers				■	■		
Interviews with Market Experts				■	■		
Qualitative analysis					■	■	
Final Report elaboration						■	■

## APPENDIX 2

### Consumers' Interview guide

(Translated into Portuguese, interviewees' native language)

#### I. Filters

- **Filter 1:** Age quota (between 18 and 40 years old)
- **Filter 2:** Gender (feminine)
- **Filter 3:** To be a fragrance user (selective/non-selective/ perfume's substitutes)
- **Filter 4:** To had, at least once, bought beauty products in the non-selective channel

If she corresponds to all these requirements, proceed with the interview.

#### II. Guiding Principles

- **Warm up:** Good Morning/Evening, I am a student at Faculdade de Economia da Universidade Nova de Lisboa and I'm conducting a study about cosmetics. I will not ask you specific questions about the subject as in a standard questionnaire, this means that you will be free to tell me whatever comes to your mind on the subject... If you don't mind, I will record the interview. This interview will last approximately 1h. So, may we start?

#### III. Topics to be developed

##### - Initial Question:

"Can I ask you which perfume (s) are you using now?"

"Can you tell me why and how you decided to use this specific perfume?"

##### - Consumer Behaviour (regarding fragrances)

- Frequency (How many times a day? A week?)
- Reasons (Feelings...)
- Occasions of consumption (Go to work? Routine? Before a date? To go out? ...)
- Which features should a perfume have to be noticed by you?
- What could lead you to dislike a perfume?
- Do you consider yourself loyal to a specific brand of perfume? Do you use more than one? What would make you change?
- What is your feeling about a perfume that could be used simultaneously by men and women?

##### - Purchasing Behaviour (regarding fragrances)

- Do you buy your own perfumes or are they offered to you?
- Who offered?
- In which occasion?
- Who decided the perfume?
- When do you buy perfume? (Impulsive or planned?)
- How do you choose between different brands of perfumes? (Characteristics, fragrance, packaging, advertising, brand itself, price, word of mouth, trends...)
- Can you describe the last time you bought a perfume (from the moment you decided to the moment you bought it)?
- Did you bough anything else besides the perfume?

**- Distributors behaviour (regarding fragrances)**

- Where do you go to buy a perfume?
- Do you like having someone inside a store, explaining you the differences between the perfumes?
- What do you feel about their methods?
- What are the most important characteristics a perfume store should have?
- Is there any problem for you to buy a perfume in a supermarket? Why or why not?
- Do you remember any perfume brands that are sold in the supermarket?
- If yes, how would you describe them?
- And whom do you imagine buying them?

**- Price perceptions (regarding fragrances)**

- What is the minimum value a perfume brand should charge to be considered reliable by you?
- Would you buy a perfume from a low-priced brand because of its better fragrance?
- What distinguishes a perfume from an *eau du cologne*?

**- Communication awareness (regarding fragrances)**

- Do you remember any advertising campaigns of perfume?
- Do you remember any other marketing actions of a perfume?
- What did you liked/disliked?

**- Additional Questions (regarding fragrances)**

- Is there anything perfume brands are forgetting to offer to their consumers?

**- Projective Technique (expressive Technique):**

- If you could have a perfume just for you, how would it be?

#### **- Maybelline New York**

- MAYBELLINE, what is the first thing that comes to your mind?
- What products does it sell?
- Where did you see a maybelline product for the last time?
- Have you ever used any of its products? Why?
- If yes. Where do you buy Maybelline products?
- Why do you buy them? Why not?
- When do you use Maybelline products and Why (Feelings, Occasions ...)
- In your opinion, what are the major strengths and weaknesses of Maybelline NY? (When compared with other make up brands)
- What other brands would you put in the same bag with Maybelline?
- Do you remember any advertising from Maybelline?
- What do you think about people that use Maybelline's products?
- What other products would you like Maybelline to have?
- What do you feel about Maybelline launching a perfume? How would you imagine it? For who?
- Do you consider buying a perfume from Maybelline New York? Why?

#### **IV. Correspondent Profile**

- Age
- Occupation
- Area of Residence
- Fragrance usage (selective/ non-selective/ perfume's substitutes)

## APPENDIX 3

### Market Experts' Interview guide

(Translated into Portuguese, interviewees' native language)

#### Non-selective Perfume Product Manager (António Banderas)

1. What do you think are the main critical success factors of a perfume brand?
2. Within the fragrance market, where does António Banderas fits?
3. What are the main competitor brands of António Banderas?
4. Do you consider that António Banderas competes directly with other selective brands? If yes, with which ones?
5. How had been the evolution of the non-selective market in Portugal?
6. Do the selective perfumes represent a great weight in the Health and Beauty sector (within the mass market)?
7. When did António Banderas have been introduced in the Portuguese market?
8. Where is António Banderas sold in Portugal? And in the rest of the world?
9. In what does António Banderas mainly differs from the other perfumes sold in the selective channel?
10. What are the main competitive advantages of this perfume when compared with the ones sold in perfumeries?
11. What about the disadvantages?
12. Who is António Banderas' consumer in Portugal? And in the rest of the world?
13. Who owns this brand?
14. When representing this brand in Portugal, are there any guidelines to be followed?
15. What type of marketing/advertising strategies had been followed to support this perfumes' sale?
16. Who decides how and when to execute these activities? Owner? Representative? Distributor?
17. I had heard this perfume is a huge success among the non-selective brands, how would you justify this success?
18. Do you think it makes sense to sell perfumes in supermarkets? Why?
19. Do you think there is any prejudice regarding this channel when selling a perfume?
20. What do you think are the main advantages of a supermarket when selling a perfume?
21. What actions could be introduced in the non-selective channel to drive this segment sales?

22. Are the key success factor for a perfume like this different from the ones sold in the selective channel? If yes, which ones?
23. Do you think it is possible to sell a dream in the supermarket?

### **Selective Perfume Product Manager (Armani)**

1. In your opinion, what are the main critical success factors of a perfume brand?
2. Within the fragrance market, how would you divide it? Selective/non-selective?
3. Do you think there is a specific consumer for each category? Can you explain that?
4. What are the main distribution channels chosen to sell L'Óreal products? Do they differ among products?
5. Within the chosen channels, is there any preference? (Companhia de perfumes, Corte Inglês...)?
6. Is it L'Óreal that goes to the distribution channels or are the channels that look for L'Óreal products?
7. Assuming that Armani is sold only in the selective channel, what are the main requirements L'Óreal has to the channels in terms of point of sale?
8. Do you know if brands like Armani had already been sold in the non-selective channel (Continente, Pão de Açúcar...)?
9. If yes, how were the results?
10. If not, what had been the main reasons not to do it?
12. What are the main constraints of the non-selective when selling a perfume like Armani? And opportunities?
13. Do you think this crisis scenario drives consumers to prefer channels like supermarkets when buying a perfume?
14. If yes, do you think there is an opportunity for perfume brands already selling in the supermarket?
16. António Banderas perfume is a non-selective success case, do you know it or another similar case?
17. Do you think perfumes like António Banderas follow different critical success factors?
18. Do you consider perfumes like António Banderas a threat to the selective ones (like Armani)?

### **Directors of Perfumery in non-selective channels(Auchan/Sonae)**

1. Why does Auchan/Sonae sell perfumes?
2. Which products do people buy at Auchan/Sonae stores to get fragranced?
3. Who buys these perfumes?
4. Which type has higher rotation?
5. Which is more profitable?

6. Do you think Health and Beauty Brands are innovative?
7. How the perfume brands sold at the supermarket are aligned with the perfume producers brand strategies?
8. What are the main perfume brands sold at Auchan/Sonae?
9. What are the main selling drivers of perfumes?
10. What are the main constraints when selling a perfume in the supermarket?
11. And opportunities?
12. Is it profitable for Auchan/Sonae to sell perfumes?
13. Is it possible to sell a dream at the supermarket?
14. Do Auchan/Sonae stores differ from each other regarding perfumes offer?
15. What makes Auchan/Sonae different from the rest of distributors?
16. Do you think there would be another way of selling perfumes?
17. What other obstacles do perfume brands face when selling in the supermarket?
18. What does Auchan/Sonae require from its perfume suppliers?
19. Other comments?

# APPENDIX 4

## Sample Design

Figure II: Sample Design

### Qualitative research

#### Consumers

Selective Perfume Users	10 In Depth Interviews
Non Selective Perfume Users	5 In Depth Interviews
Perfume's Substitutes Users	5 In Depth Interviews

#### Market Experts

Perfume Brands Experts	2 semi-structured Interviews
Non-selective Distribution Experts	2 semi-structured Interviews

## APPENDIX 5

### Additional consumer's quotes

#### Additional outputs from the Market Experts interviews:

##### A. Purchase decision

1. Most interviewees (**under 30**) **rarely buy a selective perfume**, it is usually offered (boyfriend, parents, godfather...)

##### Qualitative output:

“Oferecem-me normalmente. Já comprei...” (selective perfume user, 28 years old)

“Oferecem-me sempre (anos: Maio e natal, de 6 em 6 meses). Nunca comprei.” (selective perfume user, 24 years old)

2. Some interviewees (under 30) had **already bought a perfume as a gift**

##### Qualitative output:

“Sim, ao João, eu que ele gostou depois de experimentar (se eu não lhe oferecer ele não usa)” (selective perfume user, 27 years old)

##### C. Place to buy

5. **The great majority** goes to the **selective channel to buy or test** their perfumes.

##### Qualitative output:

“Vou a lojas de cosméticos: SÉPHORA” (selective perfume user, 30 years old)

“Nas perfumarias, Companhia dos perfumes.” (selective perfume user, 27 years old)

“Quando me oferecem, nas perfumarias. Quando eu compro, é água de colónia nos supermercados.” (selective perfume user, 19 years old)

##### D. Attitudes towards the perfume's price

7. Most selective perfume users are **willing to pay a higher price**, if it's **too low** they tend to **distrust** the perfume.

Qualitative output:

“O caro é associado a bom. Evitaria, mas se gostasse compraria.” (selective perfume user, 19 years old)

“Se gostasse do cheiro, mas tem que ser de confiança.” (selective perfume user, 26 years old)

**E. Non-selective markets potential and constraints**

**11. Some selective perfume users interviewed wouldn't mind to buy their perfume in the supermarket, but is something they had never thought about**

Qualitative output:

“Perfume, perfume nunca comprei, mas água-de-colónia sim. Porque não há lá o que eu quero. Se houvesse, eu comprava. Faço distinção naquilo que eu quero e não no sítio.” (selective perfume user, 24 years old)

**12. Most selective perfume users interviewed would not go to the supermarket to buy a perfume .**

Qualitative output:

“Nunca fui ao supermercado para comprar/experimentar perfumes.” (selective perfume user, 21 years old)

“Compro só ÁGUA DE COLÓNIA. Não tenho problemas em comprar, À partida não vendem as MARCAS BOAS - vendem os MAIS BARATOS (DON ALGODON e BENNETON). Vou às lojas específicas de perfumes (ao associar a uma compra CARA).” (selective perfume user, 29 years old)

**F. The ideal store environment to buy a perfume**

**16. Most selective perfume users give importance to the length, brands display, cleanness, comfort ability and presentation of the store.**

Qualitative output:

“GRANDE e com pé direito ALTO (não pode ser atacancada), organizada por marcas, promoções no meio, últimos lançamentos, as pessoas que estão a atender têm que ter um ar limpinho e bonito, tem que haver testers. MÓVEIS altos.” (selective perfume user, 28 years old)

“AMPLO, DISCRETO, onde estejamos à vontade, com um CHEIRO HIBRIDO. Bom exemplo: Perfumes e Companhia (simpático), Mau exemplo: CORTE INGLÊS, demasiado abafado e barulhento.” (selective perfume user, 40 years old)

“Poder estar à vontade.” (selective perfume user, 26 years old)

“Apresentação. O perfume é a nossa marca para os outros. Iria buscar aquilo que eu gostasse que as pessoas me vissem.” (selective perfume user, 19 years old)

### **G. Perfume T.V. Advertising campaigns**

#### **18. Every interviewee recall straightforward at least one T.V. spot**

##### Qualitative output:

“CHANNEL - mulheres nuas no meio de rosas, não sei muito bem.” (non-selective perfume user, 24 years old)

“J'ADORE (piscina de ouro)” (selective perfume user, 21 years old)

### **H. The ideal perfume**

#### **19. The type of fragrance (detailed and subjective characterization).**

##### Qualitative output:

“tribal e ao mesmo tempo suave, que tivesse qualquer coisa de selvagem, um toque masculino (força, presença, vitalidade, sexy, sensualidade, um toque de pimenta, menos frágil)” (selective perfume user, 28 years old)

“Do género do BLUE, mas com um CHEIRO MAIS INTENSO, leve mas com uma ou outra nota mais forte” (selective perfume user, 24 years old)

“Não doce nem muito forte.” (non-selective perfume user, 20 years old)

“Seria FRESCO, DURAR, CHEIRO DOCE com FRESCURA DA NATUREZA (musgo, mar)” (perfume’s substitute user, 27 years old)

“à base de CITRINOS (um dos melhores perfumes que eu tive)” (selective perfume user, 35 years old)

“SUAVE e BEM GUSTOSO.” (selective perfume user, 40 years old)

#### **20. The fragrance’s ability to impress others and to express ones self.**

##### Qualitative output:

“Para usar tds os dias, q me identificasse...” (perfume’s substitute user, 18 years old)

“Tinha que ser mesmo muito fresquinho, que desse a ideia que tivesse acabado de sair do banho, de vir da rua.” (perfume’s substitute user, 21 years old)

#### 21. The fragrance’s **bottle design**.

##### Qualitative output:

“FRASCO: primaveril, o da BIODERME transparente.” (selective perfume user, 29 years old)

“EMBALAGEM muito BONITA.” (selective perfume user, 35 years old)

### I. Brand Loyalty

#### 23. Most interviewees are loyal to a brand **just for a certain period**; they like to change.

##### Qualitative output:

“Vou experimentando. Se gosto de um, mantenho-me naquele durante algum tempo.” (selective perfume user, 26 years old)

“ Não. Vou um bocado pelo que me oferecem. Se gosto, repito.” (selective perfume user, 24 years old)

“De perfume não tanto. Vai sendo por fases. No VERÃO uso uns mais do tipo de ÀGUA DE COLÓNIA. No INVERNO - uso mais fortes.” (selective perfume user, 35 years old)

#### 24. Most selective perfume users interviewed **change** perfume when **someone offers** them a different one or when they **taste one they like** (in the store or through friends)

##### Qualitative output:

“...o meu padrinho normalmente oferece-me no Natal, sempre diferente, eu costumo gostar” (selective perfume user, 27 years old)

### J. Choice of the Perfume

#### 27. Some give great importance to the **store’s assistant** when choosing a perfume

##### Qualitative output:

“Gosto que me aconselhem quando tenho uma dúvida.” (selective perfume user, 31 years old)

“A pessoa precisa saber do que está a falar.” (selective perfume user, 40 years old)

“Gosto que esteja alguém disponível” (selective perfume user, 28 years old)

“digo o género que eu gosto e ela propõe-me. Gosto que sejam simpáticos mas que NÃO ME IMPIJAM.” (selective perfume user, 29 years old)

**28.** Some get upset with the **store’s assistant** when choosing a perfume

Qualitative output:

“Não gosto nada, detesto” (non-selective perfume users, 21 years old)

**30.** Important to be where it can be **TESTED** (Corte Inglês is the main “tester”)

Qualitative output:

“CORTE INGLÊS: vou lá experimentar, não sou eu que compro.” (selective perfume user, 24 years old)

#### **K. Fragrance usage**

**34.** Most interviewees use fragrance as **a way to express themselves.**

Qualitative output:

“o cheiro faz parte da minha identidade, é muito importante para mim” (selective perfume user, 18 years old)

**35.** Most perfume users **use more than one perfume:** 1 more light for the day and 1 more intense for special occasions”

Qualitative output:

“Uso DKNY e uso um mais do tipo água de colónia quando vou para um sítio mais descontraído” (selective perfume user, 26 years old)

**36.** Some interviewees **don’t use selective perfumes**, they prefer **other “ways of perfuming”**

Qualitative output:

“O perfume faz-me dores de cabeça, enjoa-me, prefiro água de colónia” (non-selective perfume user, 20 years old)

“Alternativas ao perfume: creme NIVEA HIDRATANTE, champoos” (perfume’s substitutes user, 20 years old)

## L. Most important characteristics of a Fragrance

38. The great majority says the **FRAGRANCE** is the most important feature of a perfume”

Qualitative output:

“CHEIRO FORTE, mas não pode ser ENJOATIVO (demasiado floral)” (selective perfume user, 27 years old)

39. Other important characteristics are: “**bottle design**”, **lasting** ability and to have **other’s approval**.

Qualitative output:

“...que DURE” (selective perfume user, 40 years old)

