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Mature consumers' relationship with their perfume

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La relación de los consumidores maduros con su perfume

Abstract

Glamorous and stylish, perfume is an evocative product that provokes a stimulus of the senses. It is suggested that the basis for consumer choice for this product should be based on olfactory preference, however the process related decision-making has been shown to be more complex. The mature consumer purchase decision making in this product category is often associated with long standing, established, luxury fragrance brands. In addition, at the frontline of the perfume sales process are fragrance consultants, who possess invaluable information on consumer involvement with perfume products and brands. Hence, this paper investigates CBR (consumer brand relationship) and the subsequent perfume purchase behaviour of mature female consumers from a dual (industry and consumer) perspective. Results indicate that important perceptual differences related to brand relationships with perfume exist between fragrance consultants and experts on one hand and consumers on the other. This research promotes a deeper understanding of current consumer approach and issues surrounding female mature purchasing behaviour for this unique category of product, and complements the growing body of literature related to luxury brands.

Resumen

Glamuroso y elegante, el perfume es un producto evocador que provoca un estímulo de los sentidos. Se sugiere que la base en la elección del consumidor para este producto debe ser la preferencia olfativa, sin embargo, la toma de decisiones relacionada con el proceso ha demostrado ser más compleja. Esta toma de decisiones en el consumidor maduro se asocia a menudo con las marcas de fragancias de lujo establecidas hace tiempo. Además, en la primera línea del proceso de venta de perfumes se encuentran los consultores de fragancias, quienes poseen inestimable información sobre la participación de los consumidores en productos y marcas de perfumes. Por lo tanto, este trabajo investiga la relación CBR (consumer brand relationship) y el comportamiento subsiguiente de compra de perfumes de consumidores maduros desde una perspectiva dual (industrial y de consumo). Los resultados indican que existen importantes diferencias perceptuales respecto a las relaciones de marca con el perfume entre consultores de fragancia y consumidores. Esta investigación promueve una comprensión más profunda del enfoque actual del consumidor y las cuestiones relacionadas con el comportamiento de compra maduro femenino para esta categoría única de producto, y complementa el creciente cuerpo de literatura relacionada con las marcas de lujo.

1. Introduction

It has been argued that the basis for consumer decision-making in the area of perfume should be based on smell and informed by descriptor aids such as the Fragrance Wheel (Edwards, 2012). However, decision-making for this product denotes a more complex process. Industry sources report that this product is often sold referring to its newness, popularity, endorsement (usually linked to a celebrity) and overall packaging (Donna, 2009). Additionally, past academic research has posited that nostalgia (Holbrook, 1993), attachment (Ball & Tasaki, 1992) and innovativeness (Manning et al., 1995) are important predictors of the purchase decision with regards to perfume for this age group (Lambert-Pandraud & Laurent, 2010). Furthermore, in terms of mature consumers' purchasing decision-making is often linked to older or long standing luxury brands, especially in the fragrance market. A recent review of the perfume industry has found that the market has reached a certain level of saturation with approximately 300 new fragrances being launched onto the market on a yearly basis (Mintel, 2014) with an 85% rate of penetration amongst women consumers in the UK who use perfume as part of their grooming regime on a daily basis (Mintel, 2014). Women are also responsible for over two-thirds of the total sales of fragrances in the UK and women's fragrances themselves make up 68% of the total offering on the market (Keynote, 2014). Concurrently, the UK fragrance market is witnessing declining numbers of the previously profitable 25-34 year old consumers (Mintel, 2014) and in addition, recent reports claim that the mature consumer (age range falling into this category is variably reported but for the purposes of this research is considered to be consumers over the age of 44) accounted for over 32 per cent of purchasing transactions in 2014 (Verdict, 2014). The fragrance market itself is set to continue growth by 16.5 % between 2012 and 2018 (Keynote, 2014). However, the mature age segment is under-represented in terms of advertising and marketing in the fragrance industry. In a society which is primarily youth centric, there is a need to focus understanding and address the issues related to targeting a 'new generation' of mature consumers. Libby (2014) suggests that by encouraging women of this age group to use fragrance more often and by capitalising on brand loyalty (also associated with this age group), this could be a key area for market development. In addition, the rise of pension age for women in the UK to 67 is creating a consumer group with a higher disposable income who are continuing their beauty routines in order to keep up their professional and personal appearance.

1.1 Fragrance market in the UK

Fragrance or perfume is defined by the website oxford dictionaries.com (2015) as *a fragrant liquid typically made from essential oils extracted from flowers and spices used to give a pleasant smell to one's body*. It has been noted that from the earliest civilisations, perfumers extracted essence from flowers and combined it with natural substances in order to create pleasant smelling essences for the body (Genders, 1972). Perfume has since taken on a particular significance for its user and consumer as portrayed by Cant et al.:

> When a woman buys perfume, she buys much, much more than simply fragrant fluids. The perfume image, its promises, its scent, its name and package, the company that makes it, the stores that sell it – all become a part of the total perfume product. (2006: 192)

Perfume is a strong symbolic product (Aaker, 1997) which has been shown to enhance self-esteem and lift moods (Edwards, 2015). It is also a product which can transcend different product categories as Rambourg (2015), in his market research on luxury products, places perfume at the base of the pyramid as an affordable luxury. The market is segmented in different ways, the products themselves are organised according to the percentage of concentrated essential oils they include (Keynote, 2014) and are labelled as follows:

• perfume — between 15% and 25% essential oils

• eau de parfum — between 8% and 15% essential oils

• eau de toilette — between 4% and 8% essential oils

• eau de cologne — less than 4% but a minimum of 1.5% essential oils

They can also be divided according to their fragrance categories which are presented in the form of a Fragrance Wheel by Edwards (2012). This classification presents 4 families of fragrances (Floral, Oriental, Woody and Fresh) with 14 sub-families based on specific notes and accords which classifies over 13 000 worldwide fragrances (current and discontinued) and has become the industry reference for scents (Donna, 2012).

The fragrance market is led by four large manufacturing multinational companies (Coty, L'Oreal, Estee Lauder and Procter & Gamble) whose brands represent approx. 45% of the market with premium and mass offerings confounded. Other smaller manufacturers make up the remaining percentage of the market and

include premium perfume houses such as Chanel, and Puig as well as mass-market producers such as Avon (Mintel, 2012). The fragrance market in the UK is estimated to have grown between 2007 and 2014, with sales increasing by 28% over the period to reach £1.1bn in the UK and £16bn worldwide (Keynote, 2014; Pearson, 2012). Two prominent market research companies who have investigated this market (Mintel, 2014; Keynote, 2014) suggest the following characteristics as pertaining specifically to this sector; new product introductions are a regular occurrence (often led by celebrities; Jennifer Lopez has 18 different scents to her name and the industry is seasonal, with fragrances being launched mainly during two time periods (summer and winter). The area is also heavily characterised by gift purchases. Bucking the trend, consumers do not significantly reduce the amount they spend in this area, even during times of economic uncertainty and recession.

2. Theoretical framework

2.1 Brand Relationship Model

The Brand relationship model, also known as Consumer Brand Relationship (CBR) has recently been examined by Fetscherin & Heinrich (2015) who published a meta-analysis of research stemming from Fournier's (1998) contribution and spanning many iterations of the concept, from brand attachment, brand passion, brand love and brand romance amongst others. Fetscherin & Heinrich (2015) investigated Fetscherin's earlier work by examining the role of Brand Relationship Quality (BRQ) between brand experience and brand loyalty – results found brand experience positively effects BRQ, suggesting that companies should invest in CBR to change brand experiences and foster loyalty. With Keller (2014: 365) identifying just how important brand relationships are "CBR continues to be of critical importance to marketers in all types of industries and markets all over the world", the concept now plays an important part for all brands. Consequently, Neudecker et al. (2013) suggest that brand managers are now recognised as relationship managers for the brand. Furthermore, Nobre et al.'s (2010) conceptual model indicates that many different factors; consumer personality, brand personality and partner quality, all come together to create CBR. Neudecker et al. (2013: 24) further this thought by suggesting CBR changes the traditional consumer purchase decision-making process, which they suggest is "linear and one-dimensional", by posturing that brand relationship is, in fact, multi-dimensional, where variation from the linear approach is likely. As such, they recognised that a range of emotions, on the part of the consumer, come into play when CBR is being considered. Hence, by quantifying and managing CBR, brands can strengthen consumer relationships by meeting their emotional and rational needs. Granot et al. (2010) also identify that retail consumer decision making is driven by the brand. The study revealed that female consumers use the "brand" as a fundamental element of the retail decision-making process, with three key themes emerging; emotional (brand), service (retail environment) and experiential (shopping and consumption). Further recognition was found in the brand's ability to engender emotional satisfaction and loyalty and in particular how this flows back to brand perception and image. Hence, an emotional connection to the brand, on the part of the consumer, is critical to developing strong and lasting bonds.

2.2 Brand love

Merunka (2013) furthered the work of Albert et al. (2008) by examining the feelings of 'love' that consumers can develop for brands. Merunka's (2013: 262) research identified that feelings of love develop when a consumer believes a brand is reliable. It is also suggested that two of the three trust dimensions (honesty, & reliability) heighten the consumers' feelings of love towards the brand. It was recognised however, that the third dimension of altruism, "recognised as the brands willingness to take consumers' interests into account" plays no role in altering feelings of 'love' for the brand. As such Merunka (2013: 263) identifies that while consumers do not conform to all aspects of trust, it does however, play an important role in the development and sustainability of brand love. The construct of positive word of mouth and the willingness of consumers to pay a premium price were also attributed to brand love and as such it was proposed that brand love influences "both attitudinal and behavioural loyalty".

2.3 Brand personality

Aakers (1997) seminal work, where the development of five personality factors; sincerity, excitement, competence, sophistication and ruggedness was created and allowed for measurement and definition of the concept, can now be used in conjunction with CBR to establish strong consumer bonds. As indicated by Nobre et al. (2010), a strong connection between brand personality and CBR has been established. Brand personality, whereby non-physical human characteristics are attributed to the brand, are used to

create emotional bonds and, in so doing, loyal consumers (Nobre et al., 2010; Keller, 2013). For consumers, brand personality allows them to form associations, impressions and preferences for brands. It is recognised that consumers' emotional connections with brands stimulates purchases, consequently brands develop strategies to develop these emotional triggers. Celebrity endorsement, where a humanized personality provides identity for the brand, is now a commonly recognised means in which to do this. Although, it is recognised that for celebrity endorsement to succeed a 'fit' between brand and celebrity, in terms of image and personality, is a must (Ambroise et al., 2014). Celebrities utilized as brand ambassadors therefore exemplify the human component of the brand adding to the brand value, through their own desirable traits and celebrity status (de Chernatony, 2001; Kurzman et al., 2007). Ambroise et al. (2014) study specifies that brand ambassadors (celebrities) personalities substantially influence purchase decision though their ability to reinforce brand personality. Yoon & Powell (2011) recognised the importance and value of the use celebrity when advertising to mature consumers specifying its place as an aspirational consumer resource, for example Marks & Spencer's 'Twiggy' campaign.

2.4 Mature consumers

Mature consumers have been the centre of research in many consumer related research. It is generally agreed that, although the mature consumer segment is generally a lucrative one, it is under-represented in terms of target marketing and attention from brands.it has been suggested in the literature that mature consumers can be innovative (Smizgin & Carrigan, 2011) and should be the prime target (often overlooked) for luxury brands (Gardyn, 2002). Wilkes (1992) also suggested that fashion interest can be a prominent trait amongst older women. Inevitably linked to age, nostalgia, as a significant factor related to consumer decision-making has been researched by Holbrook & Schindler (1991) & Holbrook (1993) amongst others. Nostalgia research investigates the role that the past has on consumer habits and links it to age, where preferences towards brand and products fixed during sensitive or pivotal periods of life, are recalled or continued as brand preferences throughout adulthood (Schindler & Holbrook, 1993). In the context of fragrance choice Matthews (2009), a fragrance industry report, suggested that age was an indicator of differences related to the personal description of a perfume and that relationships with fragrances were lifelong and switching between brands was not considered a change but rather a parenthesis in the relationship of the consumer and the perfume. This research investigates the relationship of mature women consumers with fragrance in its complexities, the building of a brand relationship through the areas which past research have shown to be important of this context, nostalgic consumption and brand attachment and the unique nature of the product and fragrance brands themselves.

3. Methodology

Data was gathered through qualitative interviews with fragrance consultants (hereby referred to as Consultants) (n=10) who were working within a perfume specialist or general beauty related retailer who had on-going direct contact with consumers and industry professionals (n=4) (hereby referred to as Experts) (covering the functions of sales, marketing and general management) within significant companies involved in the perfume industry. The purpose of the interviews was to gain an understanding of the *industry view* of the behaviour and shopping habits of mature women in relation to perfume purchasing and gain knowledge with regards to segmentation or marketing initiatives associated with this group. This qualitative phase also enabled a triangulation (Yin, 2003) of the results with the quantitative data gained from consumers themselves in order to present a fuller picture of the characteristics and behaviour of this segment in relation to the purchasing of perfume products. The interviews covered topics related to the perceived purchasing behaviour of mature women with regards to perfume and the relevant consumer segmentation applied to the perfume market including relevant sales and marketing techniques. A structured survey was distributed to women at point of sale (aged 44+) (n=100), following the purchase of a perfume product from a specialist retailer within a busy shopping centre located in the centre of Glasgow. Women were chosen as the principal respondents for this survey as they still represent the largest market for perfume purchasing (Mintel, 2014). Due to the broad age range (+44-100) and in an attempt to create more congruent groupings, the sample group was sub-divided into three categories, 61% of respondents were in the 44-60 age range (matures); 31% in the 61-75 range (older matures) and 8% in the 76+ range (grand matures). The survey was self-administered and supported by the incentive of an entry into a competition to win a bottle of fragrance for taking the time to complete the questionnaire. The items covered purchase behaviour with regards to perfume and related to areas of nostalgia and attachment. Interviews were analysed using grounded theory analysis as described by Strauss & Corbin (1990). The survey was analysed using statistical software (Statistical Package for the Social Sciences (SPSS) Version 12)

by means comparison taking account of the three age categories and cross tabulation (Pearson Chi-Square) tests.

4. Results and Discussion

4.1 Mature women and their relationship to fragrance

Lambert-Pandraud & Laurent (2010) found that as age increased, the number of bottles of perfumed owned decreased, however this research found that 90% of respondents owned 2 or more bottles of perfume with 39% owning 5 or more. Further research has shown that brand loyalty and familiarity only concerned 18% of fragrance consumers overall who plan to stick to the same perfume. When investigating the mature market this average rises to 53%. This has certain implications for the industry, one aspect of which has been illustrated by the response below:

> You would think it would be beneficial for fragrance companies to encourage brand loyalty, however if you have a mature consumer who only wears the one fragrance and only buys one bottle per year, it is very difficult to gain market share and profit maximisation. The older segment is not where the money is unfortunately. (Expert)

Brand loyalty which is encouraged in many other product categories needs to be approached differently in the fragrance industry, especially for mature women.

4.2 Complex nature of nostalgic tendencies

Smell is one of the strongest human senses which has been shown to have a strong relationship with nostalgic tendencies (Barrett et al., 2010) and this is illustrated by the quote: "I wore Miss Dior on my wedding day in 1987. I just adore the fragrance…It reminds me of happy times when I wear it" (Survey respondent).

Recall of first owned fragrances is very strong in this product segment (Matthews, 2009) and this does not diminish with age. Only 2% of respondents could not recall their first perfume. However this introduces the paradox of this context, as results suggested that mature women do not wear their first fragrance and have not remained loyal to it although the attitude to the perfume remains positive. Nostalgic research suggests that brand preferences stay with consumers who have formed links in their pivotal early/late teenage years (Holbrok & Schindler, 1994). A lifelong relationship can be built in this context, through the olfactory conduit of the product without the necessity of any further transaction between the product/brand and the consumer. The actual scent is not the important aspect of the product here, it is when it is associated with certain events or people that it creates a reaction and moves into the realms of nostalgia.

4.3 Fragrance consumption and brand relationships

Literature has suggested that brand attachment in this context grows with age (Lambert-Pandraud and Laurent, 2010). A one-way between groups analysis of variance was conducted to explore the impact of different age categories on levels of attachment as measured by an adaptation of the attachment scale (Ball and Tasaki, 1992) which included 4 items an example of which is; "imagine for a moment someone admiring your perfume. How much would you agree with the statement 'If someone praised my perfume, I would feel somewhat praised myself'". Respondents were divided into 3 groups as described above (matures, older matures and grand matures). There was no statistically significant difference at the $p<.05$ level in attachment scores for the 3 age groups $F(2, 97)= 1.9$, $p=.15$, However the mean which ranged from matures (M=11.33, SD=2.68) to older matures (M=10.35, SD=1.92) and grand matures (M=10.37, SD=1.68) indicated that all age groups showed a noteworthy attachment to their perfume as all scores were below the average score (=12). Although there is no significant difference in the age groups, mature women display strong feelings of self-identification with their perfume.

Language conveying emotional intensity was regularly used by interviewees and survey respondents in relation to interactions with fragrances. The strength and emotional intensity of some of the words used such as "devastated; sad; upset" when consumers were asked to imagine their reactions if confronted with a discontinued fragrance could recognisably be attached to traumatic or important life events. These word associations are definitely more unusual when related to a brand. This is particularly true for mature consumers.

> I always find that they are more upset in comparison to younger people who don't really mind….I had somebody looking for Madame Rochas. She found it abroad and she's hiding it at the bottom of her wardrobe and using a spray a week because she wants to stick with it, she won't use anything else. She is actually keeping it in a box in the dark underneath all her clothes. So they tend to be a lot more upset. (Consultant)

This research confirmed that self-identity was supplemented through the perfume choice as consultants also established a high incidence of brand engagement (shown through the purchase of product extensions such as body lotions etc…) in this product category. It was more strongly posited by consultants than consumers that scent is part of the presentation of a person and inputs to the recognition process for others

> …it would be like there was something missing if they don't have their fragrance and a lot of the time as well, other people remember them wearing that fragrance and associate the person with the fragrance. If they don't wear their fragrance, they feel a part of them is missing. (Consultant)

In contrast, only 46% of consumers responded positively to the statement "Do you have a 'signature perfume'". This discrepancy may be related to a certain extent to issues of trust and association with the brand. Trust is important for this segment of consumers and heritage/luxury brands can fit the image that mature consumers have of themselves, in contrast to some brands which may not be as aspirational.

> …they see it as themselves. It is more so with your couture brands like Dior and Chanel, like they buy into the lifestyle of it. The same with Hermès, they want to be what they believe the brand represents…they do want something that they are going to link up with. (Consultant)

We found that brand attachment to a fragrance can also extend to the retail outlet and sometimes the salesperson within the retail environment. Interviews with the consultants showed that consumers often wanted to engage the salesperson and talk about their personal experiences related to the intended purchase and their memories/ representations associated with it.

5. Conclusion

Fragrance consumption is in a product category of its own as it often a symbolic product which involves a high level of involvement from the consumer although it is not always priced as a high involvement product. Consumers purchase this product based on associative links and self-image or through emotional connections whether for themselves or by association and displacement. There are high levels of loyalty, nostalgia and attachment surrounding this product sector but there are some contrasting perceptions emanating from the industry and consumer view. Mature consumers are a particular segment in this market and should be considered separately.

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