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MARKET PROFILE

Russian Perfume Market Overview

2017

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Russia: General Attitude Towards Perfume (1/3)

- **In general, perfume plays important role for Russian women:**
 - It is very important for a Russian woman to be sure that her appearance is top-notch and perfume serves as a final touch of the impression she leaves
 - According to a study conducted in 2012, 96% of Russian women use perfume, and on average they have 4 perfumes*.
- **Perfume in Russia is used for a whole number of reasons – for example:**
 - Aspiration (imaginative plunge into the world of beauty and glamour)
 - Relaxation (personal aroma therapy, creating personal space)
 - Self-expression (finding a perfume which reflects one's character and style, setting signature fragrance)
 - Statement (marking one's presence)
 - Status and class (choosing renowned luxurious brands or expensive niche ones)

Russia: General Attitude Towards Perfume (2/3)

- **Perfume is also a very common gift** for such occasions as birthday, New Year, International Women's Day (March 8th) which is seen in Russia as a celebration of spring and beauty*.
- **Two main scent preferences in Russia are rather different:**
 - One major group of consumers prefers energizing refreshing scents such as citrus and aquatics
 - Another major group is devoted to warm and tantalizing oriental/floriental scents.
 - Fruity and floral scents are everlasting classics among all groups.
- **Femininity is very important for Russian women** (along with other aspects such as status or personal preferences), and no matter what perfume they choose to wear, be it Chanel №5 or №19, Lancome La Vie Est Belle or Avon Today, it should reflect this side of their nature
 - Unisex perfumes are not very popular among wider audience.

**Please see the Appendix - list of popular holidays*

Russia: General Attitude Towards Perfume (3/3)

- Russian consumers are curious by nature and like to explore and experiment with perfumes:
 - To a large extent such attitude is formed due to drastic climatic and temperature changes throughout the year that affect the perception of scents both on physical and psychological levels (e.g. during really cold winter period many people are eager to get warm and prefer sweeter, heavier scents; and during hot summers light fresh scents become more relevant)
 - Beauty and lifestyle media support “seasonal” communication of perfumes, releasing overviews of perfumes for each period of the year, e.g.
 - *“Best perfumes for the end of the summer”* (wild flowers and ripening fruits – Elle Russia**)
 - *“Spring perfumes to relay the feeling of rejuvenation and optimism”* (white flowers and neroli – Cosmopolitain Russia***)
 - Another reason for such curiosity is a long history of deficit during the Soviet era when the assortment was extremely limited, hence nowadays consumers indulge themselves with exploring new perfumes (this factor is more relevant for females aged above 40 y.o. who can still recall Soviet era time).

Choosing Perfume: Seasonality (1/2)

- Russian consumers quite often have a clear picture of perfume seasonality – what season is best for certain types of scents.
- Thus, Fragrantica.ru, the biggest perfume hub in the Russian web, includes “best season” as one of the ways to rank every listed perfume, and the preferences are quite clear:



Winter: thick, warm oriental scents (Amouage Memoir, Chanel Coco) : *“When it’s cold even at home, I wear warm thick perfumes as sweaters”*



Summer: fruity, herbal, aquatic perfumes (Hermes Un Jardin de Méditerranée, L'Eau Par Kenzo): *“I need something to remind me of coolness and freshness”*



Spring: gentle flowers such as lilac, lily-of-the-valley or iris (Lanvin Eclat d'Arpege, Prada Infusion d'Iris): *“Ideal spring perfume is very delicate and has a touch of melting snow in it”*



Autumn: warm yet transparent chypres (Sisley Eau du Soir, Guerlain Mitsouko): *“I need something soft and melancholic to match the fading beauty of nature”*



Choosing Perfume: Seasonality (2/2)

- **Some perfumes are associated not with seasons but with particular holidays, e.g.:**
 - Coniferous notes with cinnamon and oranges speak “New Year” for Russians (Guerlain Aqua Allegoria Winter Delice, Lush Karma)
 - Transparent mimosa or tulip scents (L’Artisan Mimosa Pour Moi, Byredo La Tulipe) are directly linked to March 8th since these are the most typical gift flowers for this holiday – *please see brief overview of holidays celebrated in Russia as an appendix*



- However, it must be mentioned that not all consumers follow these seasonal patterns many rely on their own sense and preferences:
 - Some use same perfume throughout the year to experience its transformations.
 - Some select perfumes only according to their mood and it's not linked to external factors

Choosing Perfume: Brand and Communication (1/2)

- Part of Russian consumers are very sensitive to communication and reputation of perfumes.
- Since for many Russian customers perfume carries a trace of their “ideal self” and is seen as a way to connect to their dream world, some classical “golden age” perfumes such as №5 or Shalimar are treated with a lot of reverence.
 - They are preserved for special occasions like going to the theater or celebrating an important anniversary and are thought to require a special, elegant outfit
 - Some even state that they are not “mature” enough to wear them.
- The other side of the coin of this respectful attitude is neglect towards cheap perfumes, celebrity or mass market/sportswear clothing brands, direct sales perfumes by part of the audience.



Choosing Perfume: Brand and Communication (2/2)

- **Perception of different countries add different details to perfume perception:**
 - **French and Arabic brands** are seen as luxurious and glamorous
 - **Italian brands** are described as passionate and daring
 - **American brands** seem to be a solid day-to-day choice
 - Brands from **Germany, Sweden, Japan** are perceived as experimental and intellectual
 - **Russian brands** are usually neglected due to lack of “aspirationalism” in their image.
 - Brands like Novaya Zarya seem cheap and unworthy to many, while new generation of Russian “noses” like Anna Zvorykina and Oleg Grabchuk (G Parfums) are known only to a small segment of niche perfume lovers.



Perfume Segmentation

- Overall, perception of perfume “hierarchy” is very homogeneous across different groups of customers. It is closely linked to the price and availability of perfume brands as well as their aspirational value and can be presented on the following scale:



Perfume in Russia: Historical Background

- **From historical perspective**, neither using personal fragrances nor aromatizing homes was traditional in Russia for centuries
 - The exceptions were churches with ritual incense and aristocratic houses where flower bouquets were used to add fragrance
 - When perfumery in Russia was on the rise (since the second half of XIX century), its use was still limited to upper classes and artistic circles
- **In Soviet times** the assortment was extremely limited and only Soviet brands were available on a regular basis.
 - **French perfume** was very expensive and rare, the fact which turned it into something very desired and cherished – quite often the perfume was used for very special occasions, not on a daily basis
- This affected the perfume perception in several ways:
 - Perfume in general is related to status and glamour (also it's the most affordable item of haute couture brands, as compared to clothes and accessories)
 - The passion for trying new things and experimenting in Russians is a way to “compensate” for years of abstinence – *it is more relevant for older generation*
 - The younger audience that was not influenced by the deficit and doesn't remember it shapes their own traditions of wearing perfume

Perfume in Russia: Emerging Habits

- **Russian consumers tend to create their own “mini-stocks” of favourite perfumes:**
 - After years of deficit it is a pleasure for many to know that they don't have to spare their favourites – *it is more relevant for older generation*
 - At the same time, many people are aware that the formulas are being constantly tweaked due to changes in production process and legislation/ IFRA standards, which means their favourite formula may be no longer available.
- **Russian consumers are very concerned about counterfeit products:** if possible, they prefer to shop for perfume in flagman stores of major networks, abroad at the country of the brand's origin and in duty free, believing this provides extra protection. On big perfume boards there exist threads where people discuss authenticity their perfumes even if they are purchased new in retail
- **Shared consumption becomes more and more popular** as people become more aware of the huge assortment of modern perfumery and the economical conditions in Russia are not favourable: consumers buy small amounts of perfume in 5-10 ml atomizers, split costs of one perfume bottle between several persons or enter perfume exchange programs.
 - This way also makes selective/niche perfume more “casual” in a way, as it becomes affordable for a wider range of people.
 - Another bonus of small amount purchase is the ability to try the perfume in different weather/climate before committing to it by buying a full-size pack.

Russia: Buying Perfume

- **Retail chain sales are the most popular channel for buying perfume for the following reasons:**
 - Ability to check and try desired perfume before buying
 - Credibility of the major chains as a form of protection against counterfeit perfume
- In general, counterfeit perfume is seen as a big problem in Russia by perfume lovers, and they can never have too much certainty whether they have the real product or a fake.
- **Another common way of purchase is duty free zones in airports:** they are also seen as “counterfeit free”, the prices are often lower than in retail stores and the range in major airports can be bigger than in some cities. It is quite common to ask a travelling friend or relative to bring perfume from duty free zone too.
 - Another positive aspect of shopping in duty free zone is time: if the consumer arrives in advance, he or she has enough time to try different perfumes and make their pick without rush.
- **Online shopping for perfume** is not very popular yet due to the same fear of counterfeit products, with the general exception for online shops of retail chains. One shopping pattern is to try perfume in retail chain and then order it online for lower price in a very big and renowned online store which has many positive reviews.

Reference list

- <http://fragrantica.ru> – Russian version of the international Fragrantica project
- <http://www.laparfumerie.org/obmennik/> - online platform for perfume exchange/ split purchase
- <https://www.fragrantica.ru/board/viewtopic.php?id=1581> – discussing winter perfumes
- <https://www.fragrantica.ru/board/viewtopic.php?id=4> – discussing autumn perfumes
- <https://www.fragrantica.ru/board/viewtopic.php?id=76447> – discussing summer perfumes
- <https://www.fragrantica.ru/board/viewtopic.php?id=97109> – discussing spring perfumes
- http://romir.ru/studies/347_1339012800/ - research of Russian perfume market
- http://www.elle.ru/krasota/beauty_blog/12-luchshih-aromatov-uhodyaschego-leta/ - media communication of seasonality
- <https://www.cosmo.ru/beauty/parfum/vse-chto-nuzhno-znat-o-vesennih-aromatah/> - media communication of seasonality

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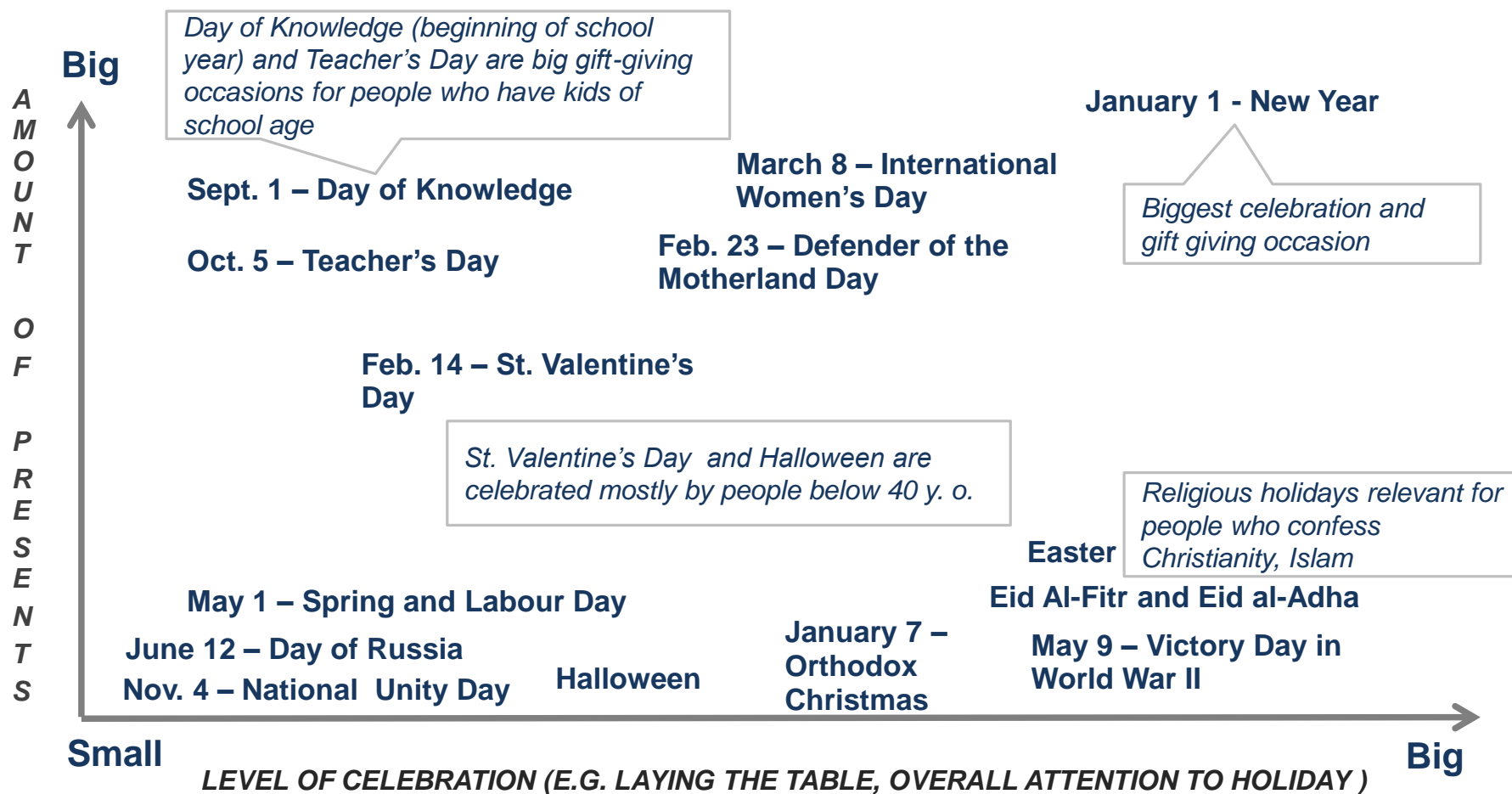
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Holidays Celebrated in Russia as Perfume Giving Occasions

General Overview of Holidays Celebration (1/2)



General Overview of Holidays Celebration (2/2)

	Public holidays - official days off	Other holidays – not official days off but celebration and gift giving occasions
Religious	January 7 – Orthodox Christmas	Orthodox Christian Easter Eid al-Fitr (Uraza-Bayram) and Eid al-Adha (Kurban-Bayram) – Muslim holidays – days off in certain regions of Russia with the majority of Muslim population (E.g. Bashkortostan, Chechnya etc.)
Not religious	January 1 – New Year February 23 – Defender of the Motherland Day March 8 – International Women’s Day May 1 - Spring and Labour Day May 9 – Victory Day in World War II June 12 – Day of Russia November 4 – National Unity Day	February 14 - St. Valentine’s Day <i>(although the background of the holiday has certain religious connotation, it is not perceived as a religious holiday)</i> September 1 – Day of Knowledge (beginning of school year) October 5 – Teacher’s Day Halloween <i>(although the background of the holiday has certain religious connotation, it is not perceived as a religious holiday)</i>

There are 2 periods during the year when people can enjoy long public holidays and can make them even longer if they take additional days off:

- January 1- 9/10 (which part of people can prolong up to January 14/15)
- May 1-10: although official days off are only May 1 and 9, part of people can take additional days off if work permits to enjoy longer vacation

Holidays as an Occasion for a Perfume Gift

- The following holidays can be an occasion for giving perfume as a gift – depending on financial possibilities of consumers and individual preferences

Holiday	Typical gift receivers
January 1 – New Year	Both males and females of different age
Feb. 14 – St. Valentine's Day	Small share (as compared to the other 2 holidays listed below) of males and females above 40 y. o. living in big cities of Russia who celebrate this holiday
Feb. 23 – Defender of the Motherland Day	Males of different age
March 8 – International Women's Day	Females of different age
Sept. 1 – Day of Knowledge and Oct. 5 – Teacher's Day	Part of female teachers who might receive perfume as a gift for these holidays – depending on the gift-giving culture and financial possibilities of specific class/ group of students

- Please note that today certificates for almost any some of money can be bought at many chain shops offering cosmetic and perfume products. So quite often gift-givers prefer to present such certificates to gift-receivers which means that upon getting the certificate gift receiver can choose and get perfume or other products at the shop.*



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