

## **99% of consumers believe a fragrance can transform their emotional well-being**

**Jennifer Stansbury, co-founder of The Benchmarking Company, discusses how emotions, personalization, and technological innovation are reshaping fragrance consumption**



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**Jennifer Stansbury, co-founder and managing partner of The Benchmarking Company, has dedicated her career to deciphering the motivations and desires**

of the beauty consumer. At her recent presentation at in-cosmetics Global, "*Fragrance Frenzy: Scents & Emotions Consumers Crave from Your Brand*", Stansbury presented the results of extensive research on how emotions and sensory experiences influence the consumer's relationship with fragrances. With data from more than 4,000 U.S. consumers, her analysis sheds light on a market increasingly driven by personalization, emotional functionality, and the desire for multisensory connection. At Next in Beauty, we spoke with her about what consumers are really looking for today when choosing a perfume.



Jennifer Stansbury

**1. Why do you think fragrances are becoming the most powerful tool to connect emotionally with consumers after the post-pandemic era?**

Fragrance has become a profound transformation to achieve the expression of well-being and identity, especially after a few years of self-isolation in which we have fallen during COVID. Fragrances such as perfumes and cologne, as well as cosmetic and beauty products that contain fragrances, are part of the self-care products of U.S. consumers, which not only affect her but also those around her, sharing her experience as a means of connection.

## **2. What kind of emotions are consumers looking for through fragrances and how do these translate into olfactory notes?**

In a TBC study of more than 4,000 people, conducted in January 2025, almost all U.S. consumers believed that the power of a good fragrance positively influenced their mental well-being. 99% believe that a fragrance can impact their character and that they are able to provoke emotional connections and memories, 96% of those who participated in this study believe that it impacts their emotional well-being.

Women look for scents that provoke specific emotions: 70% say they look for fragrances that remind them of happy moments in their lives. 55% buy fragrances that remind them of their loved ones, 49% buy scents that remind them of a time or pleasures of their childhood, such as the places where they spent their summers.

Men also have other ways of buying their fragrances. For example, of the more than 200 men who participated in the study, 58% say they value scents that remind them of happy times; 46% like those scents that remind them of their loved ones; 39% look for seasonal scents and 31% buy scents that provoke nostalgia for places they have already visited.

Women also base their decisions on something aspirational, which is why they choose some scents for their facial care products. About 75% want to feel confident when choosing a fragrance, 59% want to look happy, attractive and feminine; 54% want to feel sexy, while 46% seek to feel sophisticated. 43% want to look flirty, and 39% "playful".

## **3. What olfactory trends are dominating the market and what ingredients or accords are trending?**

The United States is projected to become the largest market in terms of revenue generation next year, with numbers exceeding \$32 billion by the end of 2025, according to Statista.

U.S. consumers are fragrance enthusiasts: 66% say they have purchased a perfume in the last six months, 65% have purchased a body mist, 36% eau de toilette and 30% have purchased a cologne in the last six months. However, they do not show brand loyalty or feel loyal to a particular scent, thus creating an open market dynamic for the launch of new fragrances. In fact, 84% of women confess to having changed their fragrance on several occasions, while only 16% say they have never changed it.

**In terms of olfactory preferences, 52% opt for floral, 38% for fruity, 37% for gourmand and 31% for citrus notes. This reveals a clear appetite for classic but also indulgent olfactory profiles.**

U.S. consumers are excited about the possibility of trying new innovations in scent: 71% of them express interest in body mists with fragrance that also provide skinification benefits. More than half (53%) seek to buy wellness with a focus on fragrances, thinking about functional fragrances; 51% look forward to head-to-toe products of the same fragrance, from hand soap to body soap and shampoos. 48% are already looking forward to trying hair mists, 41% all-over deodorants; 40% cleaner formulations of scented products; and 20% are looking forward to single-dose fragrance capsules.

#### **4. What role do artificial intelligence and data play in the development of new fragrances?**

Globally, secondary research shows that **the main drivers of growth in the fragrance sector are innovation, sustainability, personalization and the proliferation and unlimited reach of social media.** Immersive multisensory experiences that use fragrances to enhance the consumer's mood and emotional journey are expected to become increasingly common, with the emergence of ephemeral scent bars and sensory booths.

In our research, we found that **41% of consumers show great interest in technologies such as thermal release fragrances,** designed to intensify with

changes in body temperature; 26% are interested in smart fragrance devices, such as diffusers that can be controlled via a smartphone; and 16% want to explore what personalization and olfactory innovation driven by artificial intelligence can offer.

### **5. Are we witnessing a shift towards total perfume personalization? What challenges does this pose in terms of production and scalability?**

Although we cannot delve into the specific production and scalability challenges, our research clearly reveals that fragrance personalization (as with most beauty and personal care products) is an increasingly valued trend among U.S. consumers. **In fact, 29% say fragrance is important because they want to create their own "olfactory signature".**

Gone are the days when mixing scents was a cause for concern. Almost two-thirds (66%) of women in the U.S. say they love experimenting with fragrances and have no problem combining different aromatic products at the same time, such as a perfume with a scented lotion or a scented deodorant.

Many women want the ability to create their own layered blends, adjusting the intensity according to their mood, or try functional fragrances that evoke sensations or memories. 20% especially value the idea of single-dose fragrance capsules with notes customizable by the user.

### **6. How can a brand build a coherent sensory universe across all its channels, from the product to the point of sale?**

Brands are innovating with products that include fragrances aimed at improving the user experience. Some examples include limited editions and seasonal releases, fragrance layering systems, aromas linked to aromatherapy and skin care, perfumed styling products, body and hair mists, as well as general-purpose deodorants.

Reaching the consumer is no longer an exclusive experience of the physical channel. Although 74% of women in the United States want to smell a product before buying it, it is not always possible, even with sample programs. **Social**

**media has become a key channel for sales in perfumery, and is often the first source where consumers discover new trending fragrances.**

For a brand to build a strong relationship with the U.S. consumer, it is essential to understand its particularities:

- **Fragrance beyond perfume:** in the U.S., fragrance is valued in multiple categories, from skin and hair care to home or cleaning products. The search for scents that improve mood or evoke nostalgia is incessant.
- **Multichannel consumer:** although she is a great user of social networks, she buys both online and in physical stores, which offers many opportunities to communicate the olfactory proposal.
- **Fragrance as a form of self-expression:** considers fragrance an essential tool to lift the mood and will continue to allocate budget to this form of self-care.
- **Test-based consumer:** the U.S. consumer is obsessed with ratings and reviews. She needs clear evidence of effectiveness before being encouraged to try a fragrance without smelling it. Do her peers say that a *hair mist* leaves the scent in the hair all day long? That test is key for her.

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