

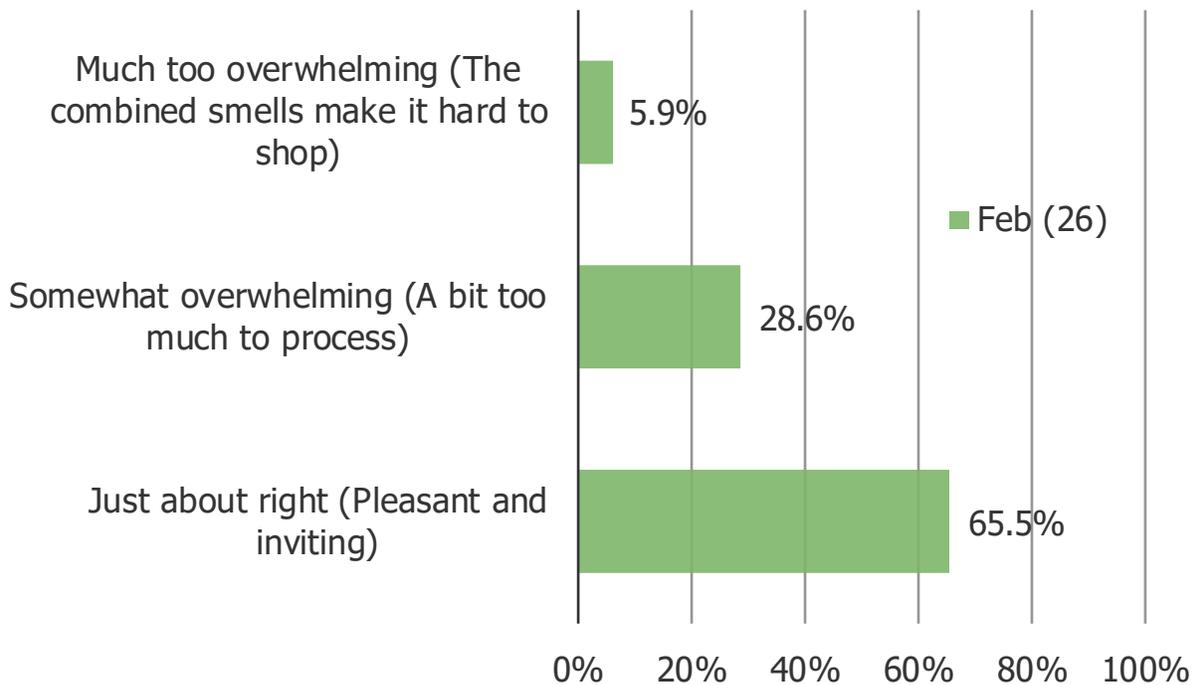
BESPOKE SURVEYS

BBWI Deep Dive, Vol 15

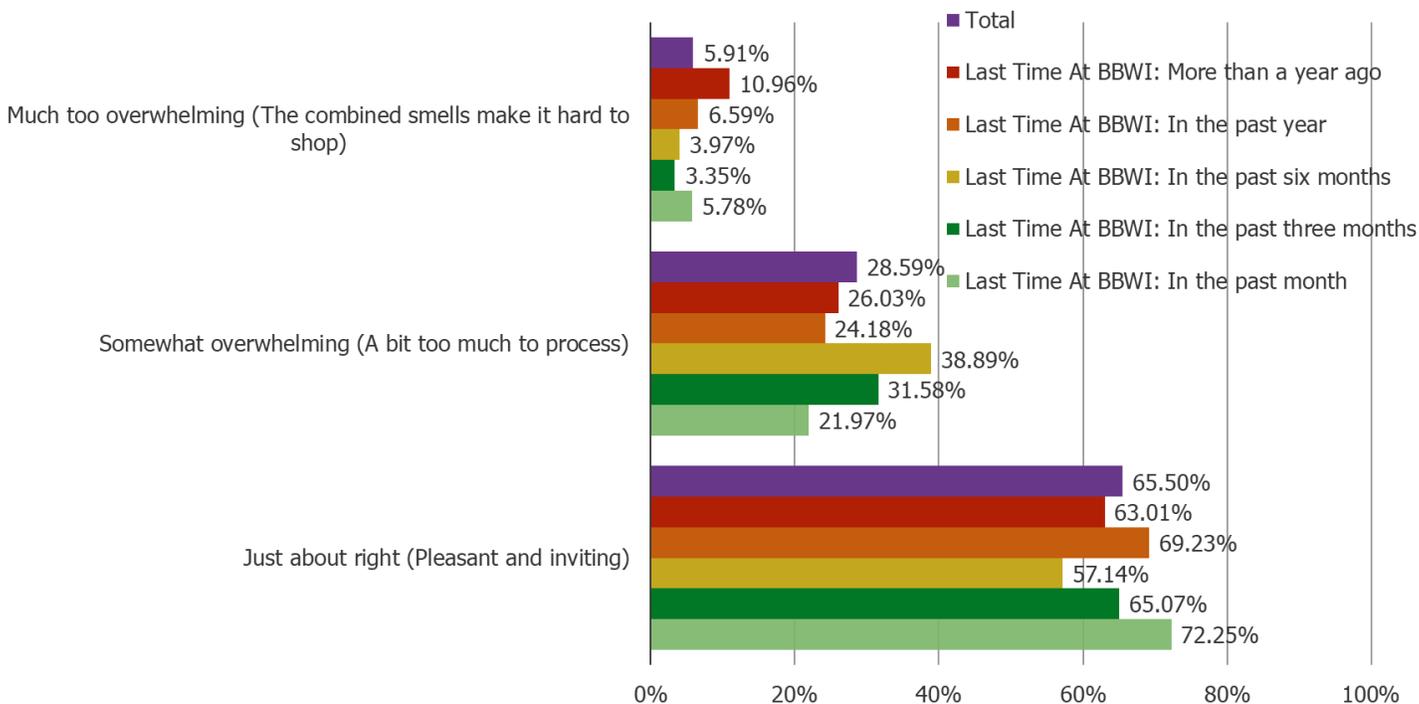
1250+ Respondents Per Quarter

THINK ABOUT THE LAST TIME YOU WALKED INTO A BATH & BODY WORKS STORE. HOW WOULD YOU RATE THE INTENSITY OF THE COMBINED SCENTS IN THE AIR, COMPARED TO YOUR EXPERIENCE AT A STORE LIKE ULTA OR SEPHORA?"

Posed to Bath and Body Works customers.

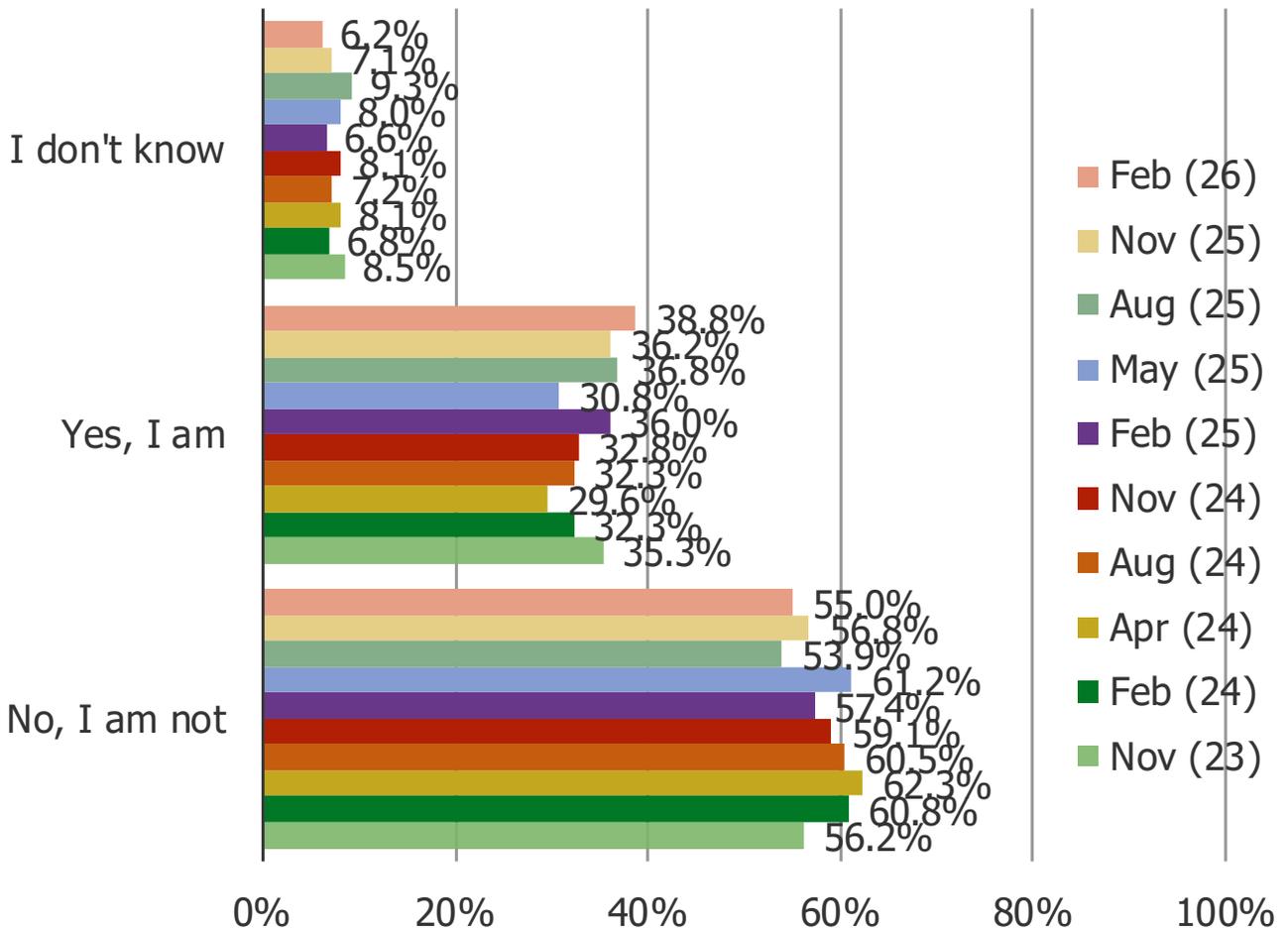


Cross-Tab: By their most recent visit...



ARE YOU A BATH AND BODY WORKS REWARDS PROGRAM MEMBER?

Posed to Bath and Body Works customers.

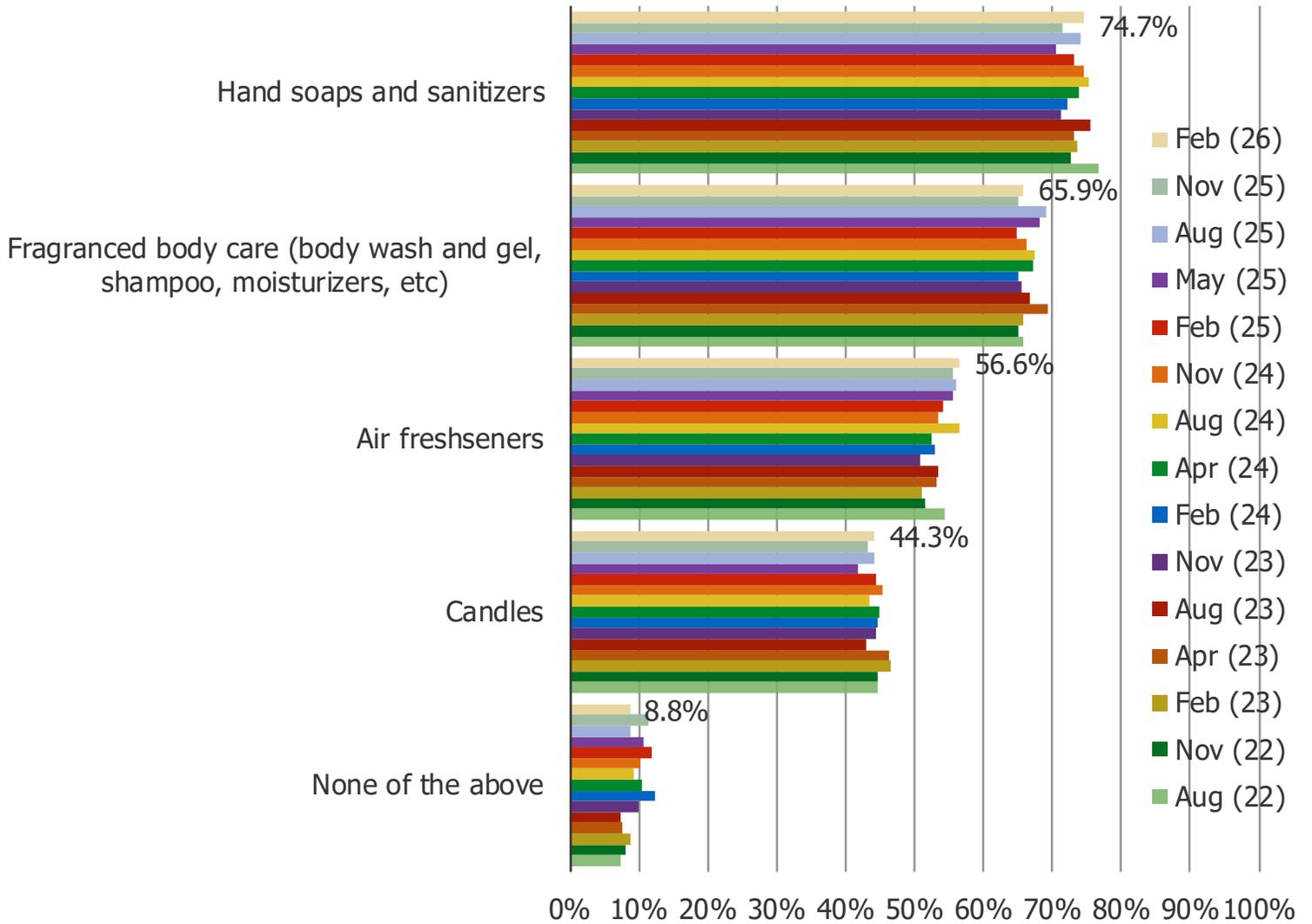


Bath and Body Works

BATH AND BODY WORKS

DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING TYPES OF PRODUCTS? SELECT ALL THAT APPLY

Posed to all respondents.



WHEN YOU THINK OF THE FOLLOWING TYPES OF PRODUCTS, WHICH BRAND COMES TO MIND FIRST?

Posed to all respondents who regularly or occasionally use each of the following products.

Handsoaps and Sanitizers													
Brand	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	Series Trend	R2	P-Value
Dove	14.70%	21.50%	22.10%	21.60%	20.20%	19.90%	21.10%	21.60%	18.40%	22.20%	7.50%	0.1093	0.3507
Dial	10.80%	13.20%	13.70%	13.50%	14.10%	13.10%	12.30%	12.60%	13.10%	13.10%	2.30%	0.0375	0.5918
Bath & Body Works	13.80%	13.10%	11.70%	10.50%	11.80%	12.20%	10.50%	12.20%	10.20%	9.90%	-3.90%	0.5571	0.0132
Softsoap	7.50%	10.70%	9.70%	9.70%	9.00%	9.90%	10.30%	12.30%	9.90%	11.20%	3.70%	0.3849	0.0556
Purell	4.10%	4.80%	3.60%	4.50%	4.00%	5.10%	5.30%	4.40%	4.00%	4.00%	0.10%	0.0015	0.9153
Generic/Store Brand	4.70%	3.80%	3.10%	3.10%	3.60%	4.80%	4.30%	3.40%	4.00%	3.10%	-1.60%	0.0395	0.5818
Irish Spring	2.00%	1.20%	2.50%	2.20%	1.80%	1.40%	1.80%	1.70%	1.30%	2.00%	0.00%	0.0603	0.4942
Suave	1.60%	1.30%	2.10%	1.70%	1.40%	2.10%	1.80%	1.20%	1.50%	1.70%	0.10%	0.0057	0.8364
Mrs. Meyer's	1.60%	2.00%	1.10%	1.40%	0.60%	0.80%	0.80%	0.50%	0.70%	0.60%	-1.00%	0.6747	0.0036
Method	0.70%	0.60%	0.80%	0.60%	0.90%	0.90%	0.40%	1.10%	0.70%	0.70%	0.00%	0.0438	0.5618

Air Fresheners													
Brand	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	Series Trend	R2	P-Value
Febreze	20.80%	22.40%	23.70%	25.10%	22.20%	26.00%	21.50%	24.90%	20.10%	26.20%	5.40%	0.0681	0.4665
Glade	22.30%	22.10%	22.30%	23.50%	20.90%	20.60%	21.00%	22.50%	23.30%	24.80%	2.50%	0.1095	0.3503
Air Wick	8.20%	11.50%	9.20%	11.40%	10.00%	9.10%	12.10%	10.20%	9.70%	11.00%	2.80%	0.0749	0.4442
Bath & Body Works	5.90%	3.50%	5.50%	3.60%	5.50%	4.50%	3.50%	3.30%	2.90%	3.50%	-2.40%	0.4256	0.0409
Generic/Store Brand	2.40%	2.40%	2.40%	1.40%	1.90%	2.00%	3.40%	2.60%	2.40%	1.30%	-1.10%	0.0087	0.7976
Yankee Candle	2.10%	0.60%	0.80%	1.30%	1.50%	1.40%	1.40%	0.80%	0.80%	0.70%	-1.40%	0.1735	0.2311
Dove	0.80%	1.10%	1.00%	0.40%	0.70%	0.80%	1.80%	1.00%	1.20%	1.10%	0.30%	0.1523	0.2648
Scentsy	0.00%	0.30%	0.70%	0.10%	0.10%	0.30%	0.00%	0.00%	0.10%	0.10%	0.10%	0.0962	0.3831
Mrs. Meyer's	0.30%	0.70%	0.10%	0.00%	0.10%	0.10%	0.10%	0.10%	0.00%	0.00%	-0.30%	0.4217	0.0422
Suave	0.20%	0.00%	0.00%	0.30%	0.10%	0.30%	0.10%	0.00%	0.00%	0.10%	-0.10%	0.0057	0.836

Fragranced Body Care													
Brand	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	Series Trend	R2	P-Value
Dove	18.70%	22.00%	23.20%	23.60%	23.90%	24.60%	25.90%	25.80%	24.70%	26.60%	7.90%	0.7832	0.0007
Bath & Body Works	15.80%	16.80%	15.10%	17.00%	17.70%	15.70%	15.00%	15.20%	14.00%	14.50%	-1.30%	0.3699	0.0621
Suave	5.30%	8.30%	9.40%	7.70%	5.80%	7.60%	5.90%	6.20%	5.70%	5.70%	0.40%	0.2073	0.1861
Old Spice	2.50%	4.40%	6.00%	3.90%	5.60%	3.70%	3.10%	4.20%	3.20%	3.60%	1.10%	0.0409	0.5751
Axe	3.30%	3.80%	4.00%	3.70%	3.70%	5.70%	4.00%	4.10%	2.70%	4.90%	1.60%	0.0495	0.5369
Olay	2.40%	4.20%	2.50%	4.00%	3.10%	3.40%	2.60%	3.00%	3.90%	4.90%	2.50%	0.1636	0.2464
Generic/Store Brand	3.50%	1.60%	0.80%	1.30%	1.30%	1.50%	1.20%	0.60%	1.60%	0.60%	-2.90%	0.359	0.0672
Dial	1.10%	0.90%	0.90%	1.30%	0.90%	1.10%	1.50%	0.50%	1.00%	1.50%	0.40%	0.0504	0.5329
Native	1.50%	0.80%	1.20%	0.70%	0.80%	0.90%	1.10%	1.20%	1.10%	1.40%	-0.10%	0.0415	0.5723
Irish Spring	1.20%	0.50%	1.20%	1.20%	0.30%	0.40%	0.40%	1.10%	0.70%	1.10%	-0.10%	0.019	0.7045

Candles													
Brand	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	Series Trend	R2	P-Value
Yankee Candle	30.30%	37.30%	33.10%	33.20%	32.90%	33.50%	32.10%	33.60%	32.50%	35.10%	4.80%	0.01	0.7837
Bath & Body Works	17.10%	17.80%	18.80%	16.90%	19.20%	16.50%	16.00%	18.70%	14.70%	14.40%	-2.70%	0.3213	0.0875
Glade	2.70%	3.20%	4.50%	4.10%	4.60%	4.20%	5.30%	3.20%	2.70%	6.10%	3.40%	0.1573	0.2564
Generic/Store Brand	5.60%	4.30%	4.00%	2.90%	3.10%	2.40%	3.20%	3.90%	3.60%	1.30%	-4.30%	0.479	0.0266
Air Wick	2.00%	1.20%	2.00%	1.90%	2.30%	2.70%	1.60%	1.70%	1.40%	2.50%	0.50%	0.0237	0.6713
Woodwick	0.20%	0.90%	0.30%	0.70%	0.50%	0.80%	0.90%	1.00%	0.50%	0.40%	0.20%	0.0561	0.5099
Dove	0.40%	0.50%	0.30%	0.00%	0.20%	0.80%	1.20%	0.80%	0.90%	0.70%	0.30%	0.371	0.0616
Febreze	0.40%	0.20%	0.20%	0.50%	0.30%	0.50%	0.40%	0.20%	0.20%	0.70%	0.30%	0.0825	0.4209
Voluspa	0.00%	0.00%	0.30%	0.20%	0.30%	0.20%	0.70%	0.20%	0.50%	0.20%	0.20%	0.2356	0.1549
Scentsy	0.20%	0.20%	0.50%	0.30%	0.20%	0.20%	0.00%	0.00%	0.20%	0.40%	0.20%	0.05	0.5346

WHEN YOU THINK OF THE FOLLOWING TYPES OF PRODUCTS, WHICH BRAND COMES TO MIND FIRST?
DEEPER ANALYSIS

Posed to all respondents who regularly or occasionally use fragrance, hand soap, candle and air freshener products.

Bath & Body Works: Loyalty Intensity Breakdown

The **Intensity Score** (averaging how often a shopper names BBW out of all categories they answered) confirms a significant downward trend ($p = 0.0306$). The brand's "mental footprint" is shrinking within its core shopping base.

Quarter	BBW Intensity Score (%)
2023 Q4	10.45%
2024 Q1	11.20%
2024 Q2	10.90%
2024 Q3	10.49%
2024 Q4	11.14%
2025 Q1	10.25%
2025 Q2	10.25%
2025 Q3	10.88%
2025 Q4	9.09%
2026 Q1	9.37%

WHEN YOU THINK OF THE FOLLOWING TYPES OF PRODUCTS, WHICH BRAND COMES TO MIND FIRST? DEEPER ANALYSIS

Posed to all respondents who regularly or occasionally use fragrance, hand soap, candle and air freshener products.

Competitive Landscape & Statistical Correlations

This analysis isolates the brands demonstrating a statistically significant inverse relationship with BBWI. The data indicates a "mental unbundling" of the core customer, where heavy shoppers are increasingly diversifying their spend toward category specialists rather than buying the full BBWI assortment.

1. Statistical Inverse Correlations (*r*-value)

A strong negative correlation indicates that as BBWI mindshare softens, the specific competitor's share rises in direct proportion.

- **Fragranced Body Care:** BBWI's decline tracks closely with Dove's growth ($r = -0.76$).
- **Hand Soaps:** Share loss in this category is inversely correlated with both Dove ($r = -0.75$) and Softsoap ($r = -0.61$).
- **Air Fresheners:** The decline in BBWI mindshare correlates with the rise of Febreze ($r = -0.66$) and Air Wick ($r = -0.66$).

2. Trend Significance (*p*-value)

These metrics validate that the observed shifts are statistically significant trends rather than random variances.

- **The "Dove Trend":** The upward trajectory for Dove in the Body Care category is highly significant ($p = 0.0002$).
- **Functional Competitors:** Softsoap's growth in the Hand Soap category is statistically significant ($p = 0.0189$).
- **Power User Retraction:** Among the most valuable shoppers (those naming 3+ brands), the decline in BBWI's "Multi-Category Intensity" score is highly significant ($p = 0.0017$).

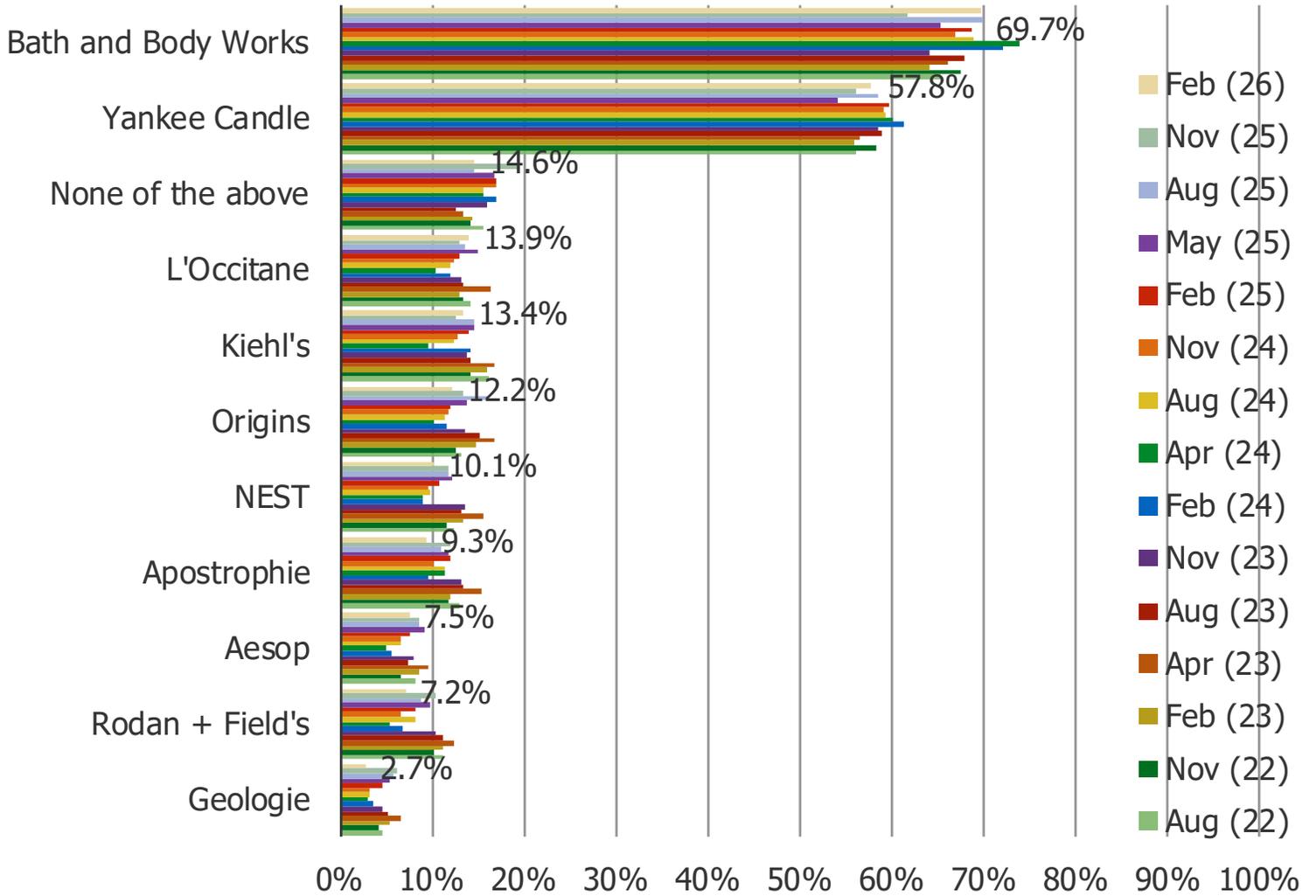
3. Primary Category Alternatives

When BBWI "fans" (current customers) select a different brand for a specific category, these are the top destinations:

- **Candles:** 60.6% select Yankee Candle.
- **Body Care:** 38.1% select Dove.
- **Air Fresheners:** 29.9% select Febreze.
- **Hand Soaps:** 24.2% select Dove.

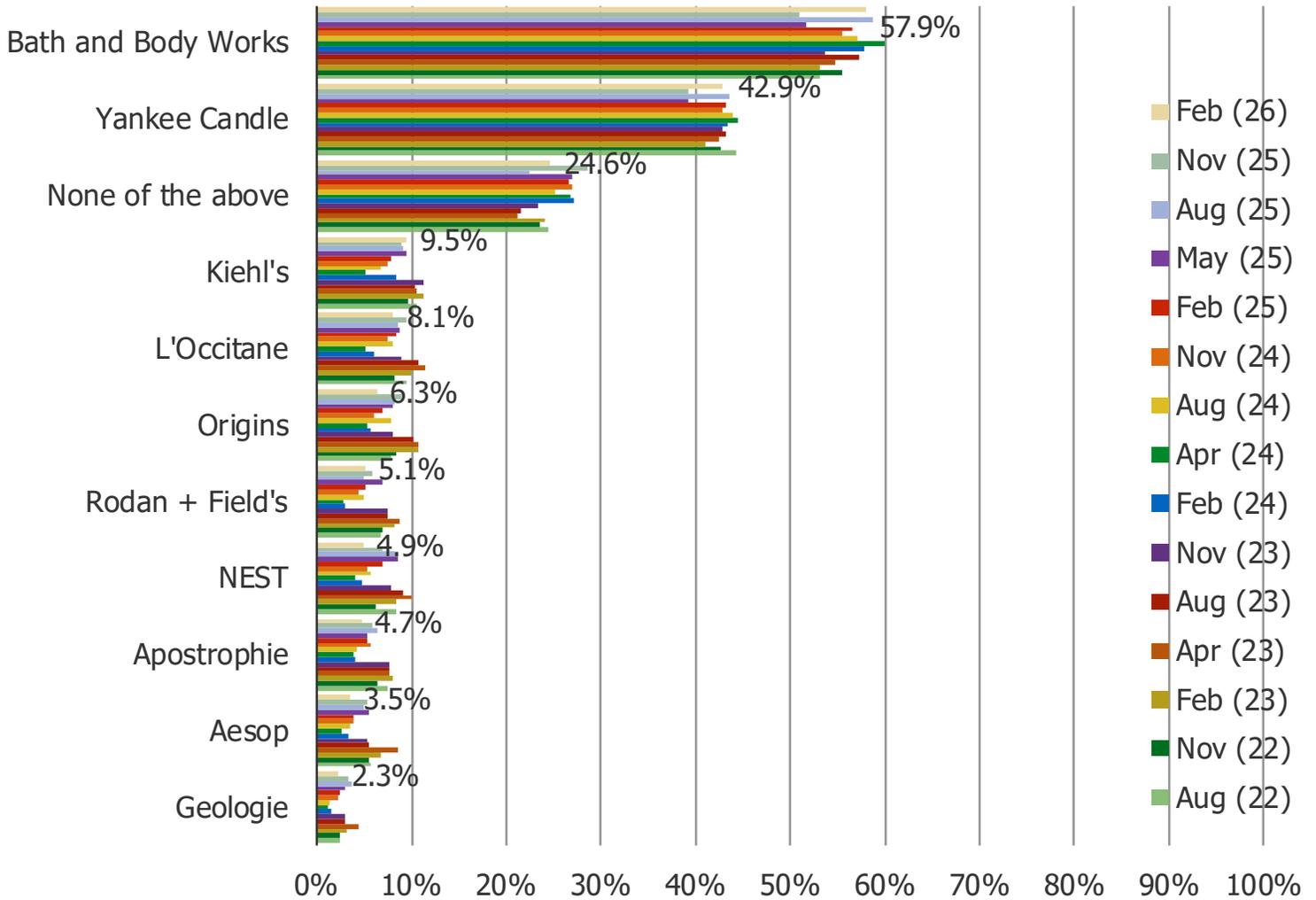
WHICH OF THE FOLLOWING BRANDS ARE YOU FAMILIAR WITH? SELECT ALL THAT APPLY

Posed to all respondents.



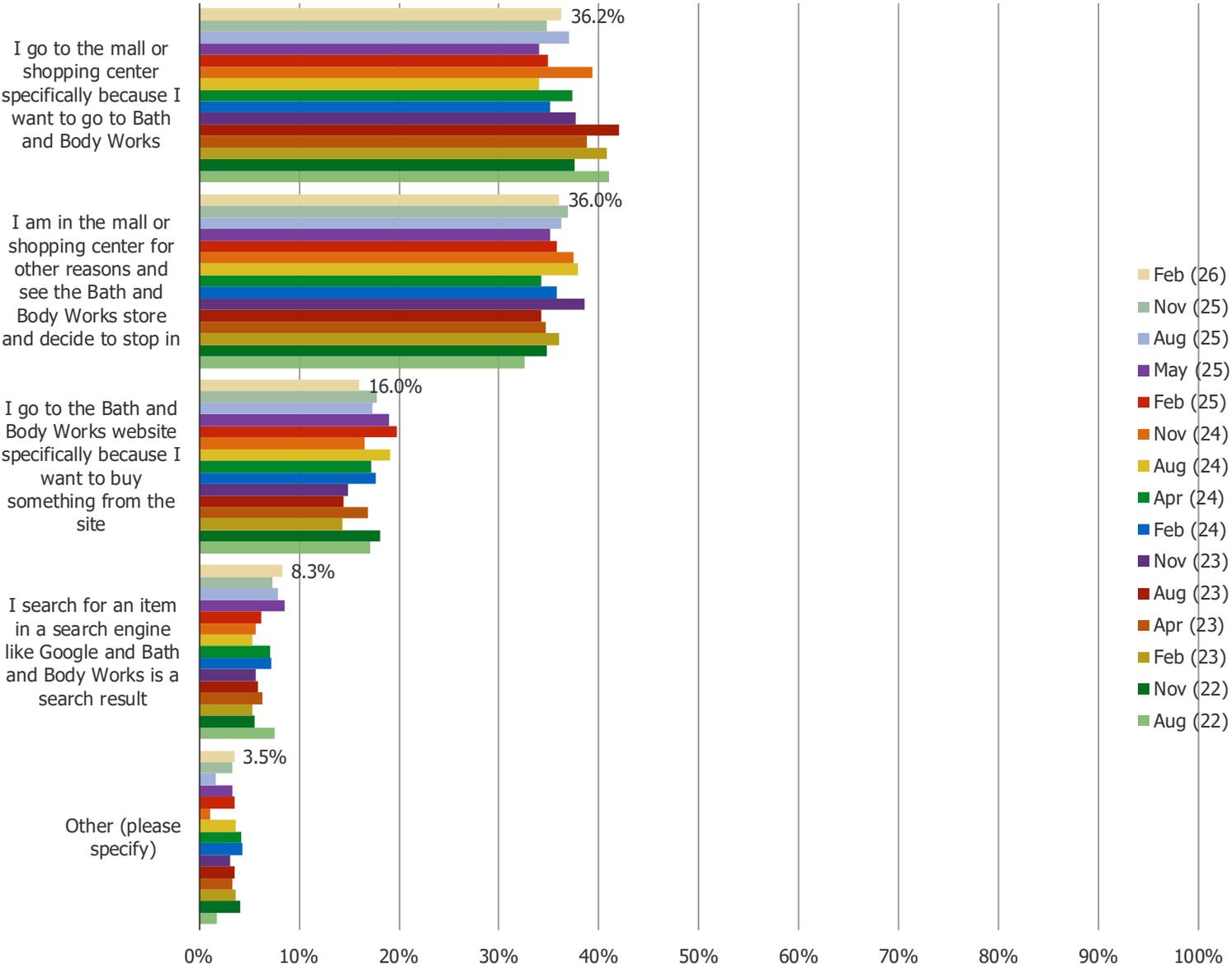
HAVE YOU EVER PURCHASED OR RECEIVED PRODUCTS FROM THE FOLLOWING?

Posed to all respondents.



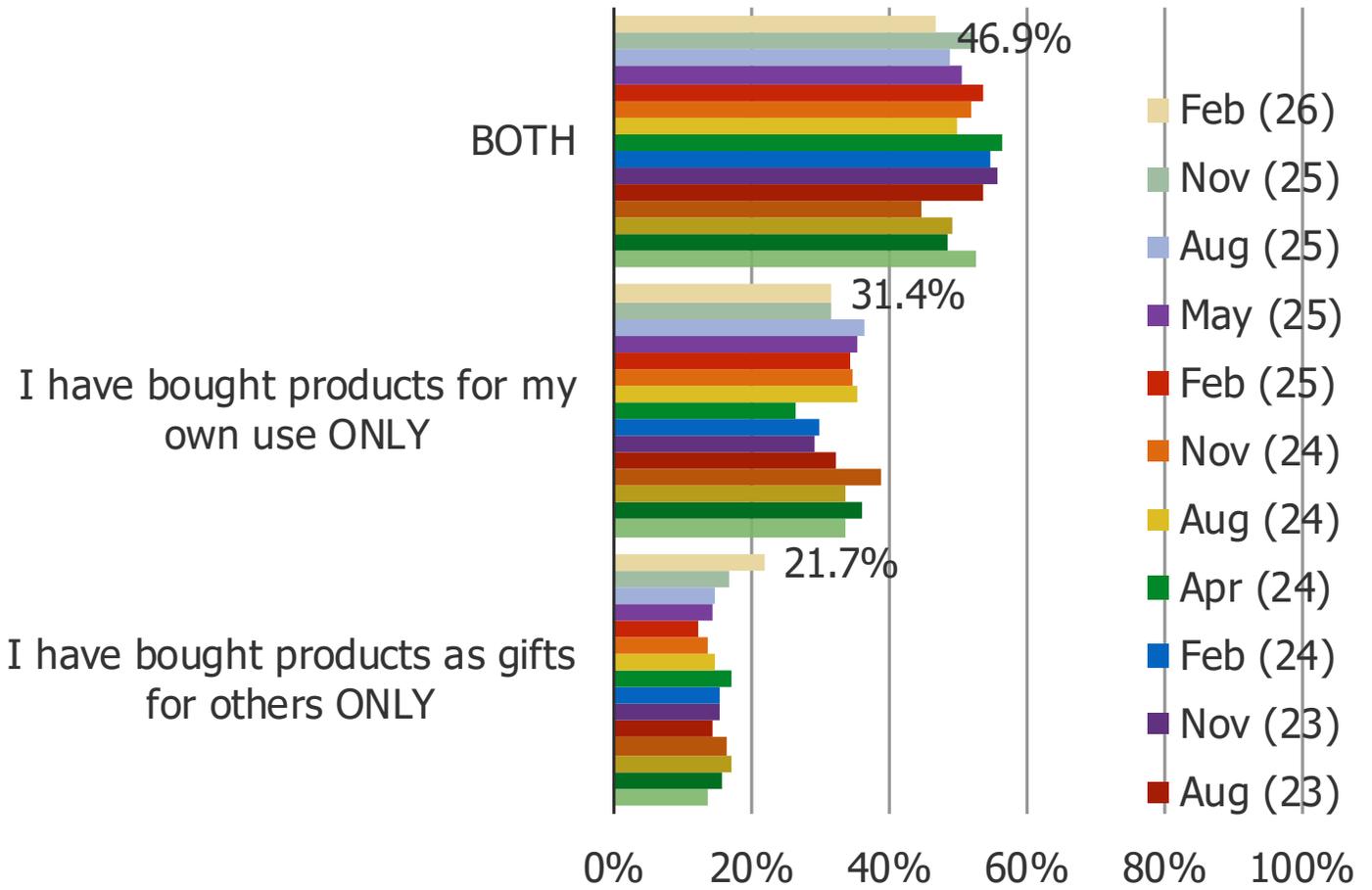
HOW DO YOU TYPICALLY WIND UP SHOPPING BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



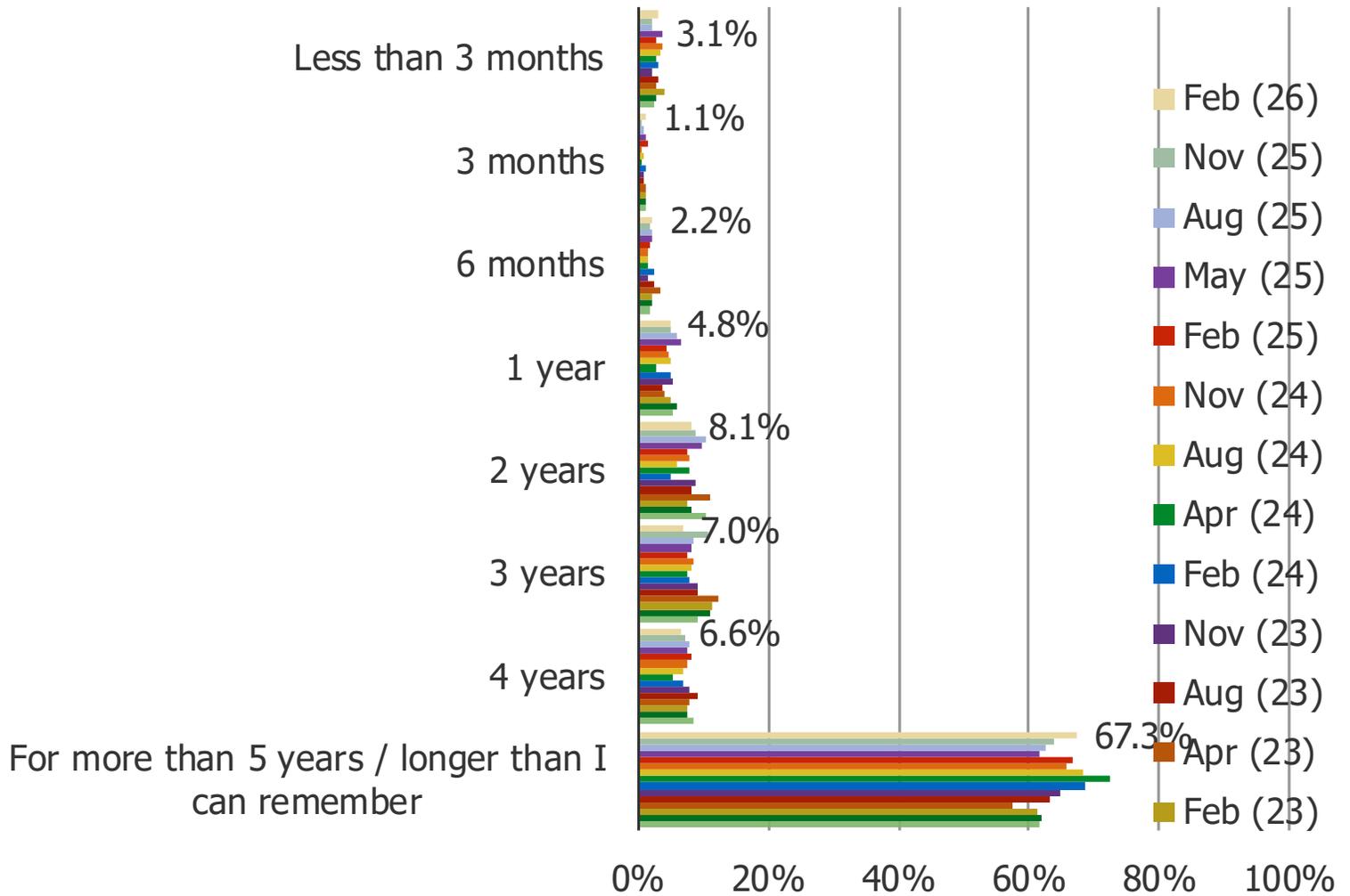
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



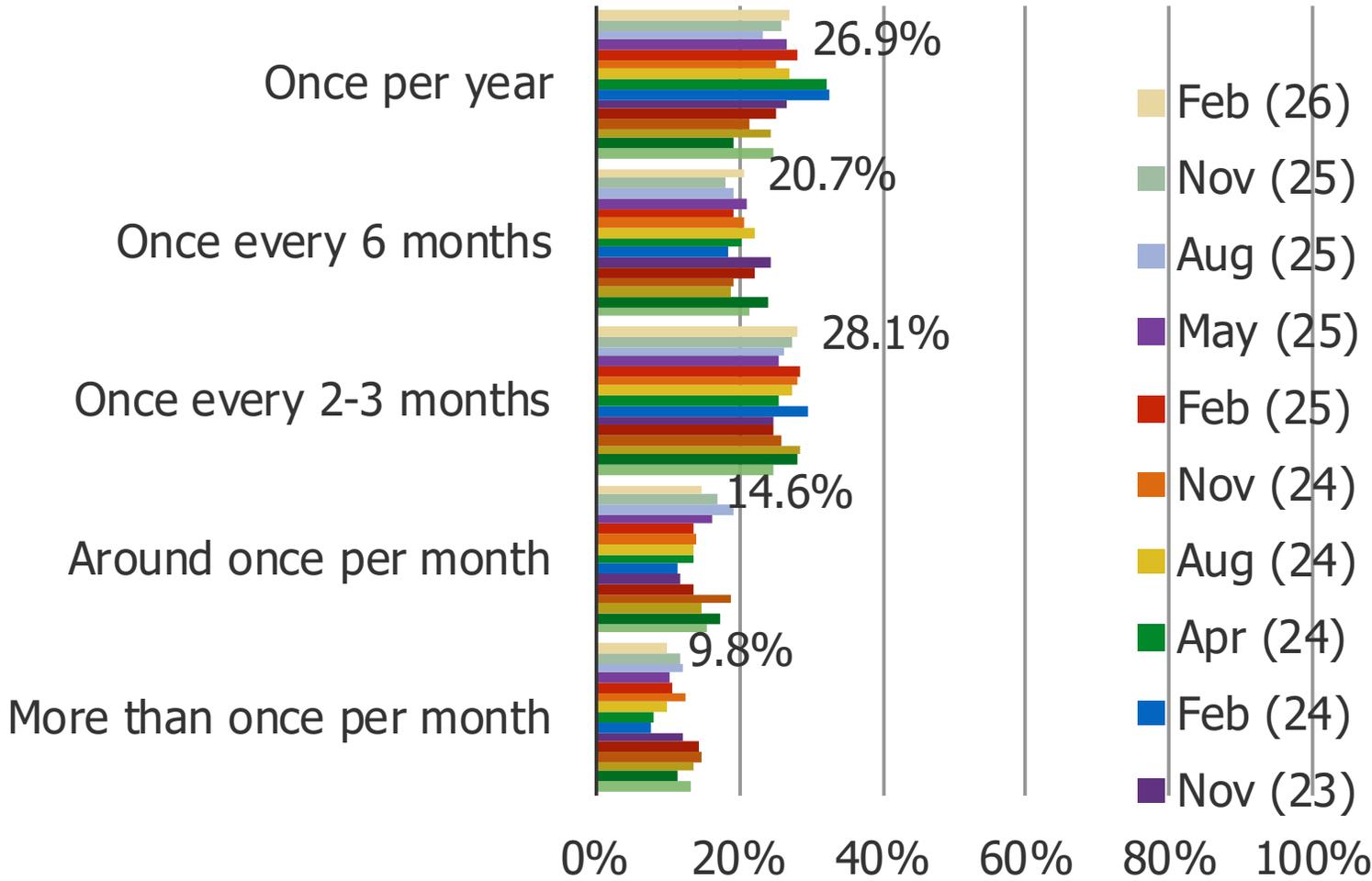
FOR HOW LONG HAVE YOU BEEN A CUSTOMER OF BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



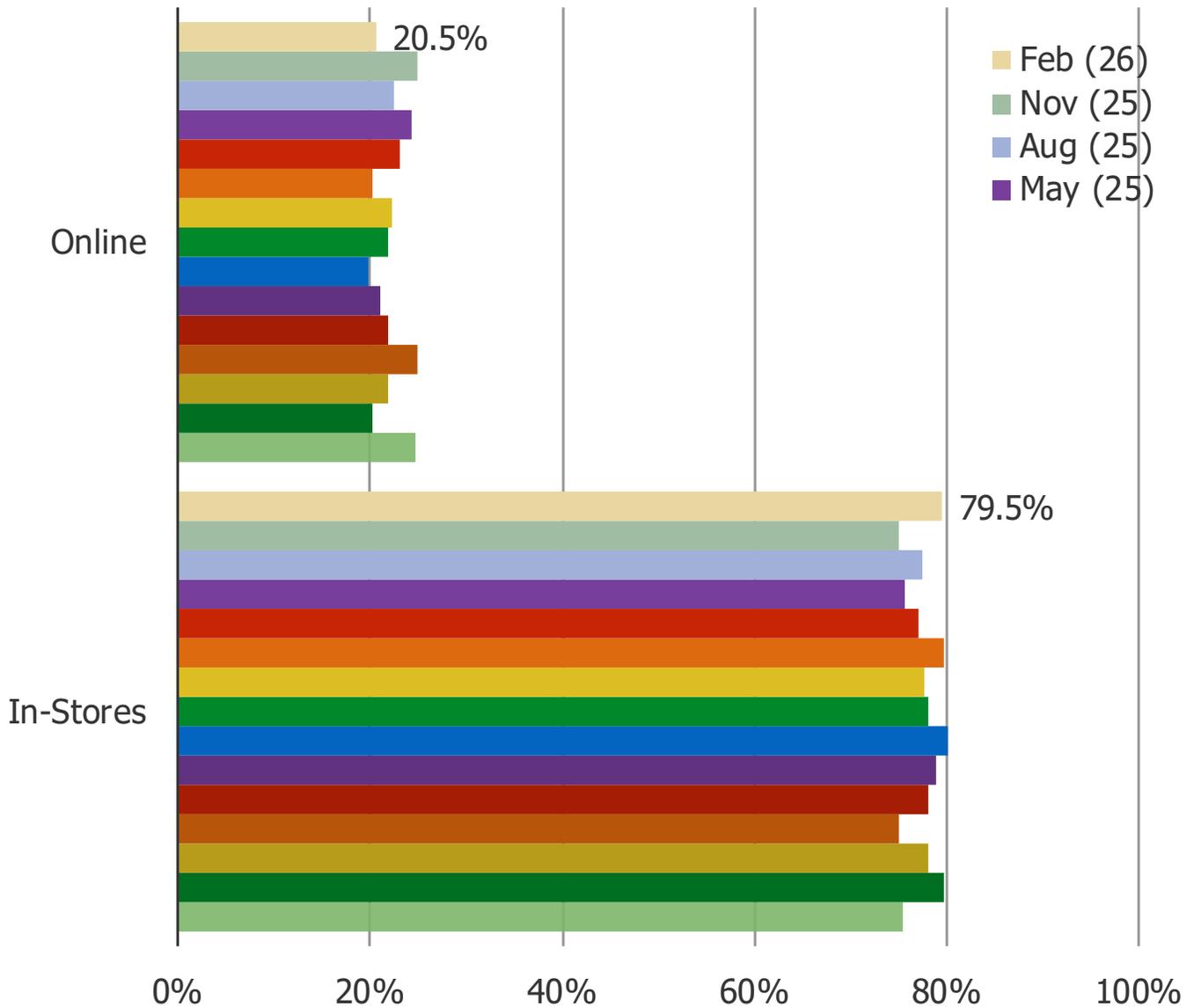
HOW OFTEN DO YOU SHOP BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



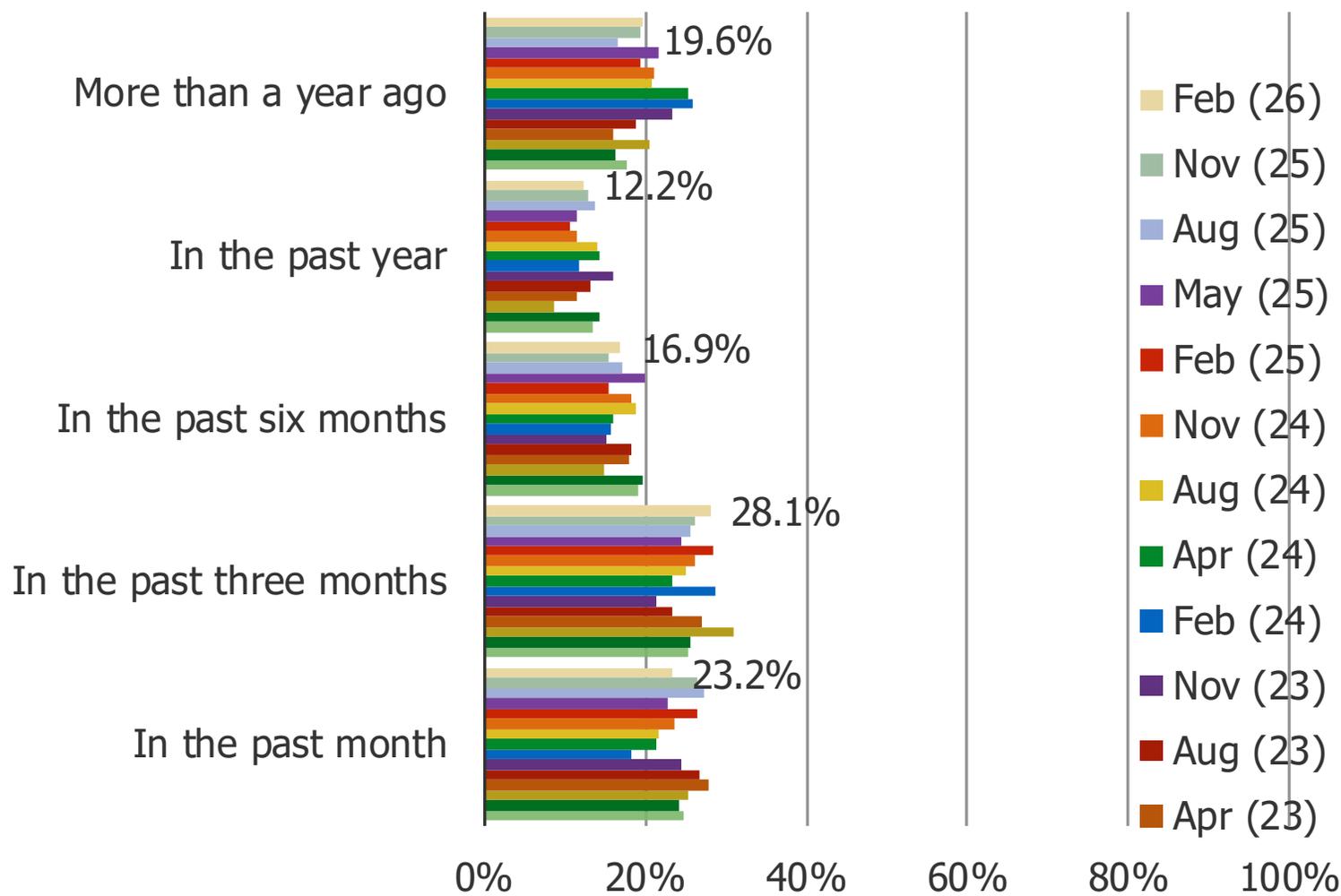
HOW DO YOU PREFER TO SHOP BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



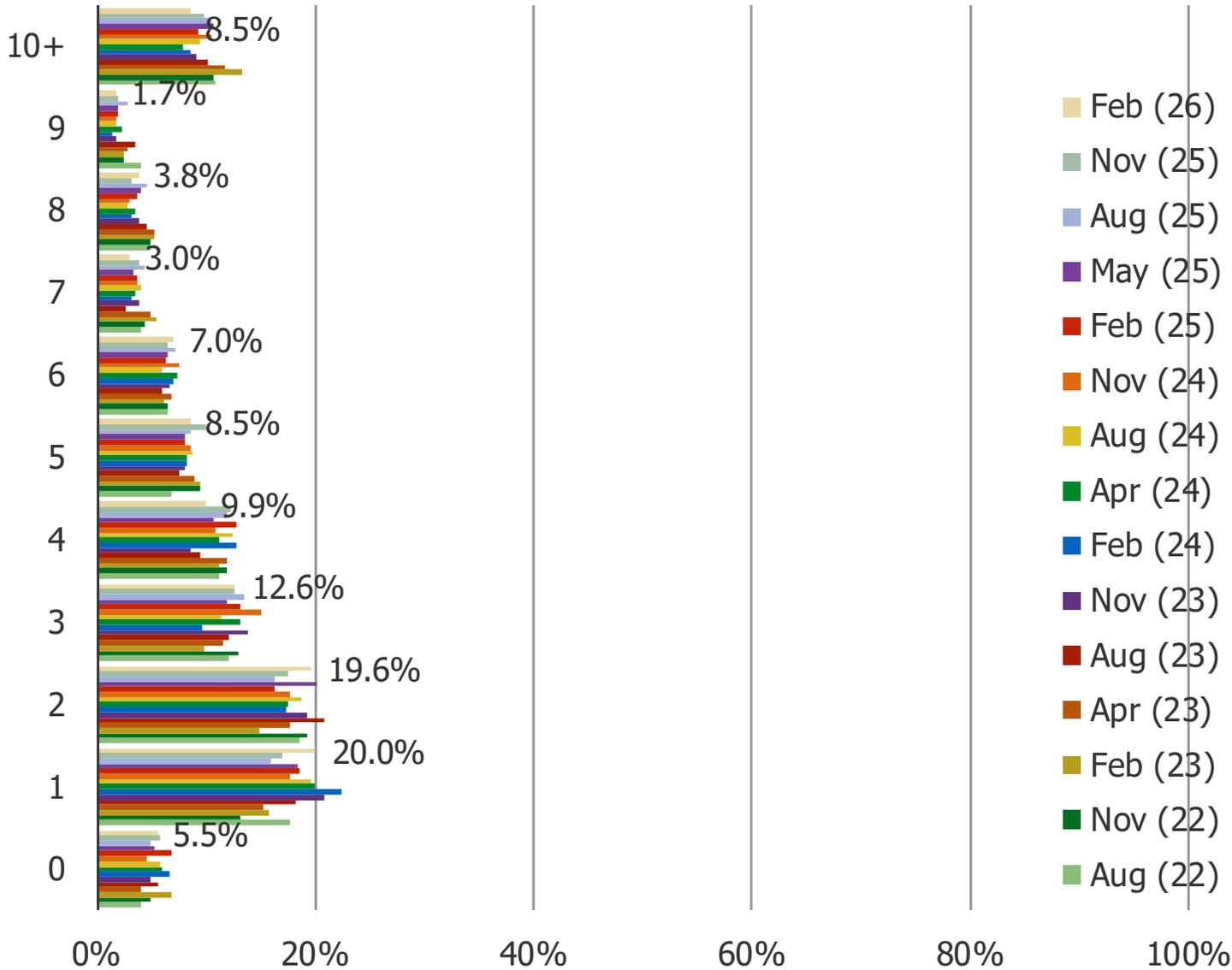
WHEN DID YOU MOST RECENTLY BUY PRODUCTS FROM BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



HOW MANY TIMES PER YEAR WOULD YOU ESTIMATE THAT YOU BUY PRODUCTS FROM BATH AND BODY WORKS?

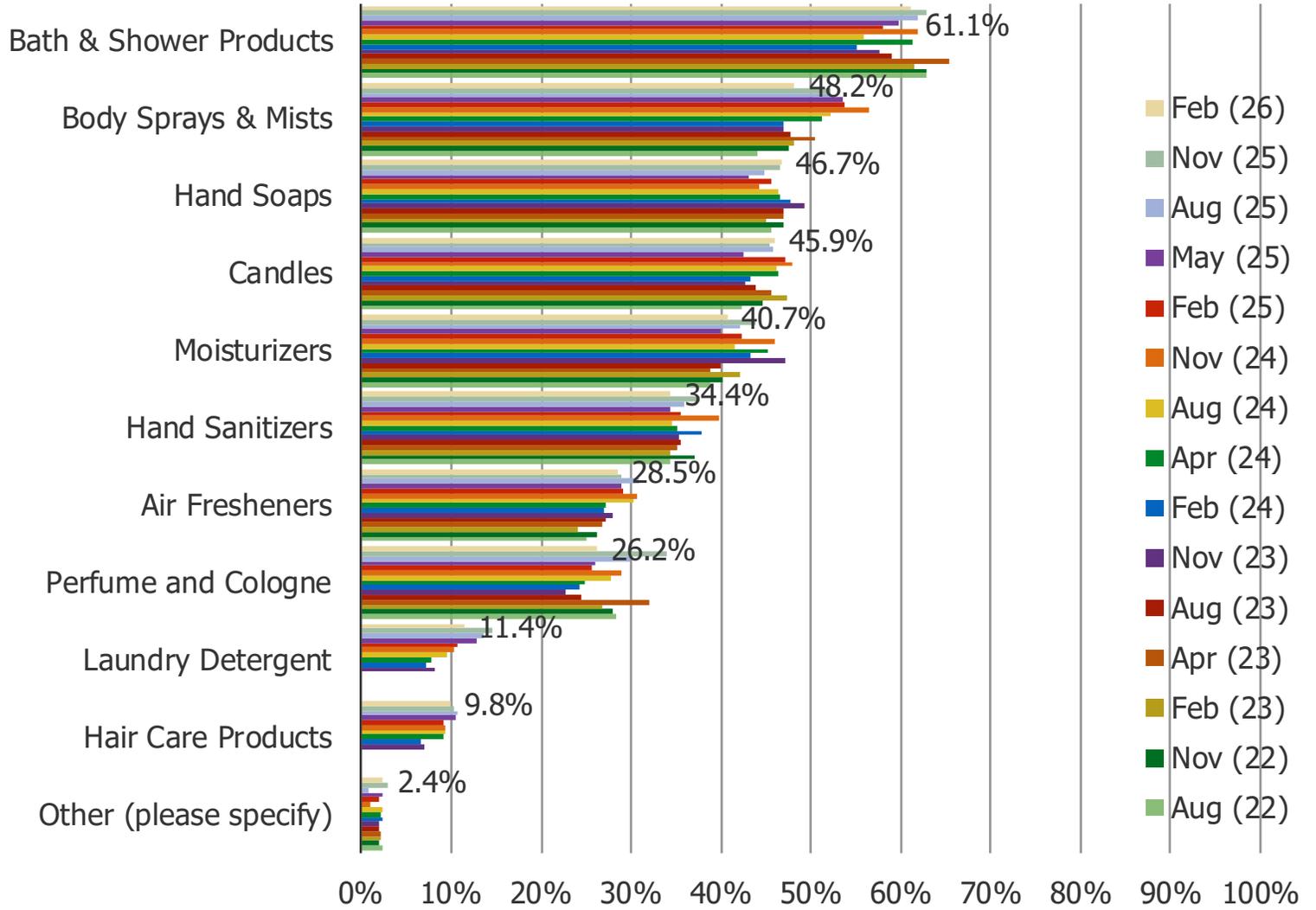
Posed to all respondents who have purchased or received products from Bath and Body Works.



Bath and Body Works

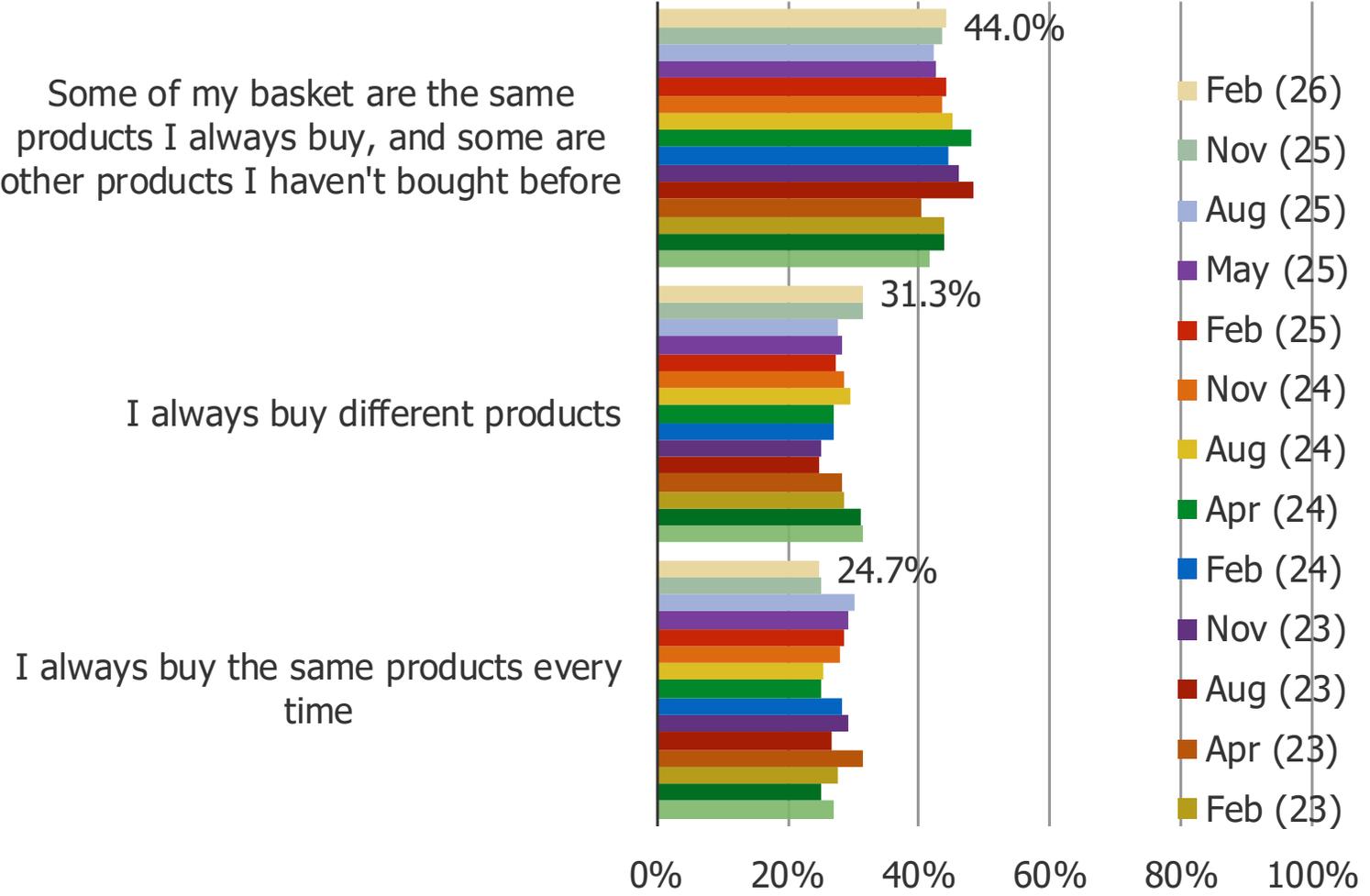
THINKING ABOUT YOUR PERSONAL USE OF BATH AND BODY WORKS, WHAT PRODUCTS DO YOU TYPICALLY BUY? SELECT ALL THAT APPLY

Posed to all respondents who have purchased or received products from Bath and Body Works.



WHEN YOU SHOP FOR ITEMS AT BATH AND BODY WORKS, WHICH BEST DESCRIBES YOU?

Posed to all respondents who have purchased or received products from Bath and Body Works.



HOW MUCH DO YOU SPEND ON PRODUCTS FROM BATH AND BODY WORKS DURING THE FOLLOWING SEASONS?

Posed to all respondents who have purchased or received products from Bath and Body Works.

February 2026

