

The world of Artistic Perfumery: what's behind the scenes

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Essencional acts as an olfactory library that brings together published articles on Artistic Perfumery and Beauty in addition to original content created by a professional editorial team.

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Editorial

— *May 2021*

Dear reader,

Since March 2018 Essencional has been monitoring on-line conversations, conversations and trends in the Beauty and Perfumery world by using search engines. Our purpose is to observe how the interest and knowledge concerning this industry is growing internationally.

The aim of this analysis is to identify the main topics that need to be studied in depth: these become the bases for Esxence’s workshops (of which I was amongst the founders in 2009).

As a result, these topics are developed on our platform throughout the year. The data was collected during the period of May 2019 — April 2020.

The analysis activity of the Essencional Study Center proceeds from year to year, collecting new data that will be cyclically presented on our portal.

Essencional is a source of knowledge that also provides a service to the industry by ensuring progressive development that emerges from the exchange of information, and by highlighting many international centers of excellence and quality.

To nurture the industry it is very important to support brand, retailers, professionals with data and information that can foster business development, creativity and innovation.

With this report, we begin to share these analyses with our users. We want give them the opportunity to make comparative analysis on how the industry is evolving and what are the keys of its development in different markets.

This research activity is accompanied by our screening activities, in which we monitor relevant on-line publications, as well as our original content production. Everything we do with Essencional is useful for both business operators, and those who are passionate about the perfume and beauty world and want to deepen their knowledge.

I hope this first report might provide a useful insight and a starting point to debate on current actions which are meant to result in the advancement of the industry.

Silvio Levi

MAIN INSIGHTS ON ARTISTIC PERFUMERY

The world of Artistic Perfumery in big numbers

*What people are saying and are asking online
about Artistic Perfumery.*

Big numbers

60 %

Percentage of conversations referring to Artistic perfumery in general (without mentioning a brand). Of 130k conversations monitored in Italian and English, 76K mentioned the general topic of Artistic perfumery. The most relevant subtopics refer to ingredients and sustainability, gender and indie beauty.



130 k

Total number of online conversations in Italian or English about Artistic Perfumery monitored. Of this number, the US and UK make up a 75% share while Italy accounts for 8% of the total.

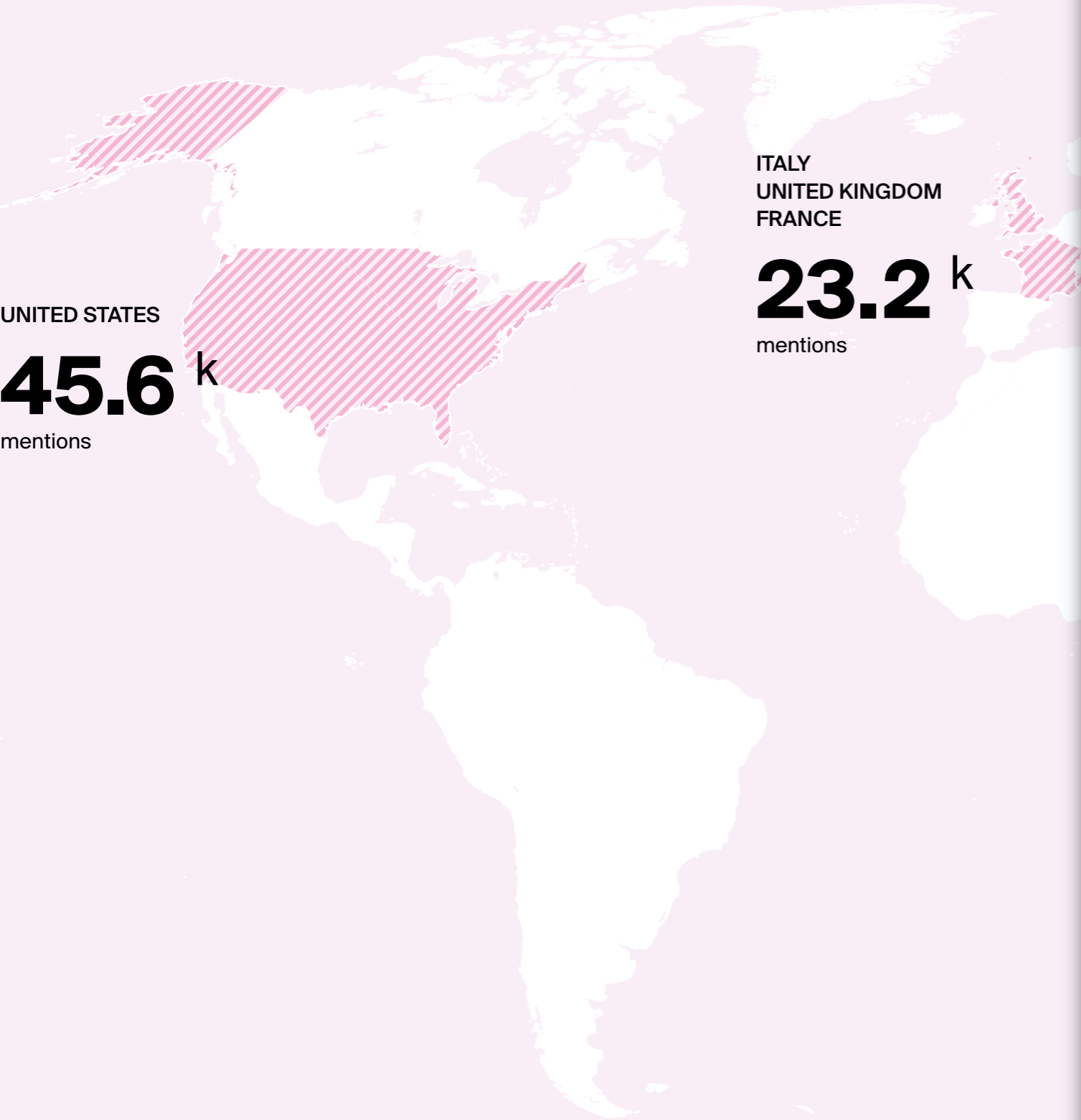


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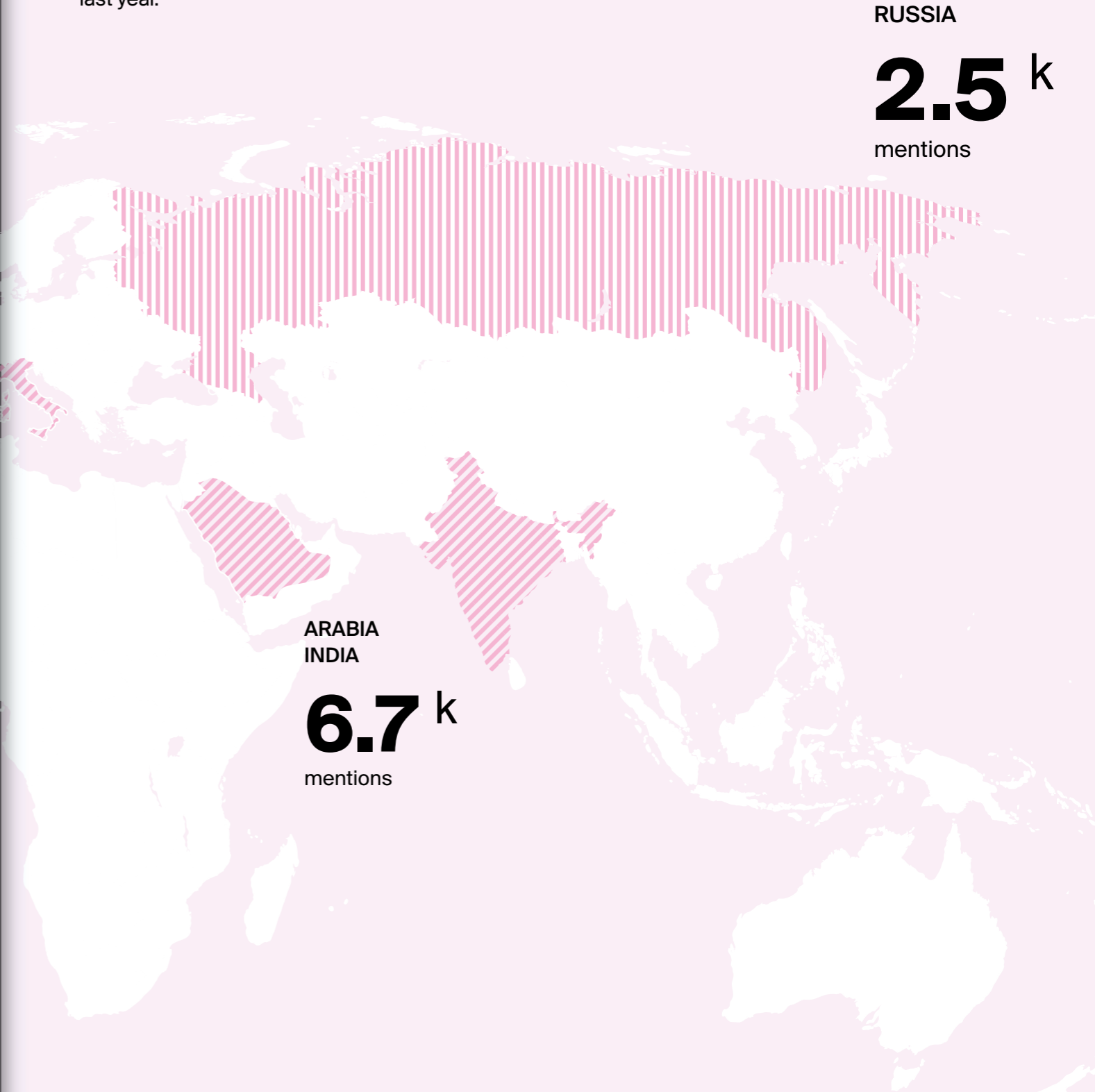
This number represents the monthly average of generic searches in English on the category “Niche Fragrances” including searches for the most famous brands and products related to Artistic Perfumery. There is a 14% increase in activity vs the prior year. Among these searches, almost 3 million refer to only one Artistic Perfumery brand. The most searched product type after perfume itself is the aftershave.

Artistic Perfumery worldwide

The map shows the countries with the highest volumes of conversations about Artistic Perfumery.



By monitoring conversations on social media we observed that most of the interactions do not come from end users but from market operators, retailers and perfume stores trying to promote their perfumes: these findings are consistent with last year.





Tell it with an emoji

6 billion emoticons are sent everyday. Emojis are the 21° Century’s digital messaging. Here are the most commonly used emoji for niche perfumery:

Most e-commerce product posts include emojis to get attention and to prompt engagement 📌👉 or just to make posts enjoyable and understandable (🍏🍏🍏🍏🍏🍏)

In general, emojis confirm even more than words that perfume affects people’s psyche and mood: it is not how others perceive and see us, but how each individual feels thanks to the perfume that they wear or love.

Positive emoji
End-users and bloggers use ❤️ to visually express feelings and emotions about brands and products and use heart faces to talk about the perfumery world. Online shops and e-commerce use this kind of emoji to mark a product as top (🏆) or to make their posts more fun and enjoyable. (😄😄).

Nature emoji
End-users and bloggers use this kind of emoji (🍏🍏🍏🍏🍏🍏) to talk about scents or review natural products. Online shops and e-commerce use these emojis to describe scents, the green label of a product or the eco-sustainability of a brand they sell.

Christmas time emoji
End-user and bloggers use them to express feelings, emotions and to indicate the specific period of time (🎁🎁🎁🎁🎁🎁). Online shops and e-commerce use them to get attention, to visually call out the time of year or to push product promotion (📌👉).

Niche vs Mass

More than 9 million online searches in English occur globally each month with terms such as “perfumes”, “fragrances” and related synonyms (+ 3.5% vs 2019). Of the 9+million online searches, 110k are attributed to niche perfumes in 2020, a remarkable increase of +240% vs 2019 where the same keyword generated just 32k online searches.

2019

NICHE

0.4 %

MASS

99.6 %



+240 %

2020

NICHE

1.2 %

MASS

98.8 %



GO GREEN

Eco-Sustainability

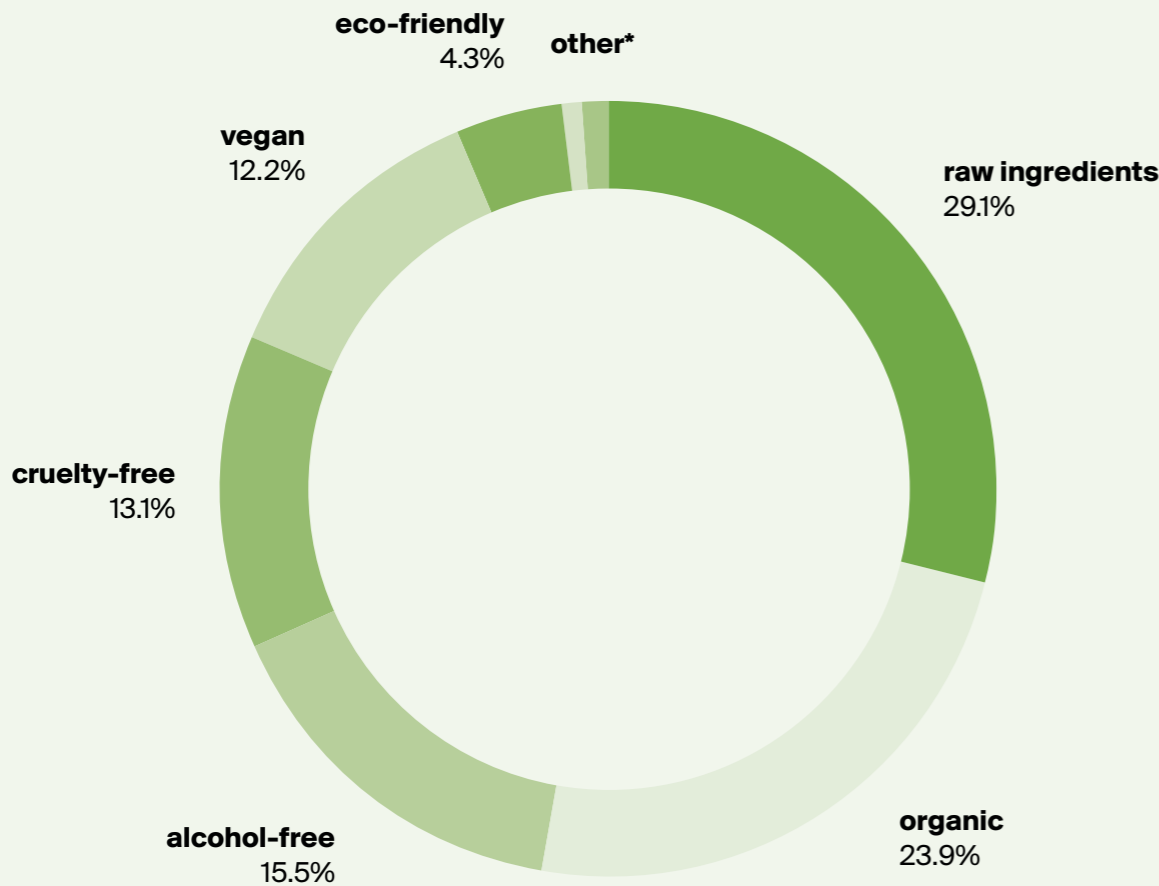
Green, sustainability, aromatherapy, vegan, organic, eco-friendly... this vocabulary is becoming more common, especially in the beauty market. What are people saying about this trend online?

Sustainability

1/3 of customers are now choosing brands based on their social and ethical impact.
(Research published by Unilever from a survey pool on five countries)

2/3 of customers are willing to pay more for sustainable products.
(Research published by Nielsen from survey of 30.000 consumers across 60 countries)

- The Green and sustainability trend is growing also in the perfume field (+75% vs 2019): End-users are more and more sensitive to the eco-sustainability topic.
- Brands are working to listen and respond to their demands incorporating an ethical approach into all products and processes. There's more to it than packaging, ingredients and marketing.
- It's to save the world and live naturally. "Less ("non", "zero", "free", "without") is more".
- Organic, alcohol-free, cruelty-free, and vegan are the most associated keywords for the perfumery world.



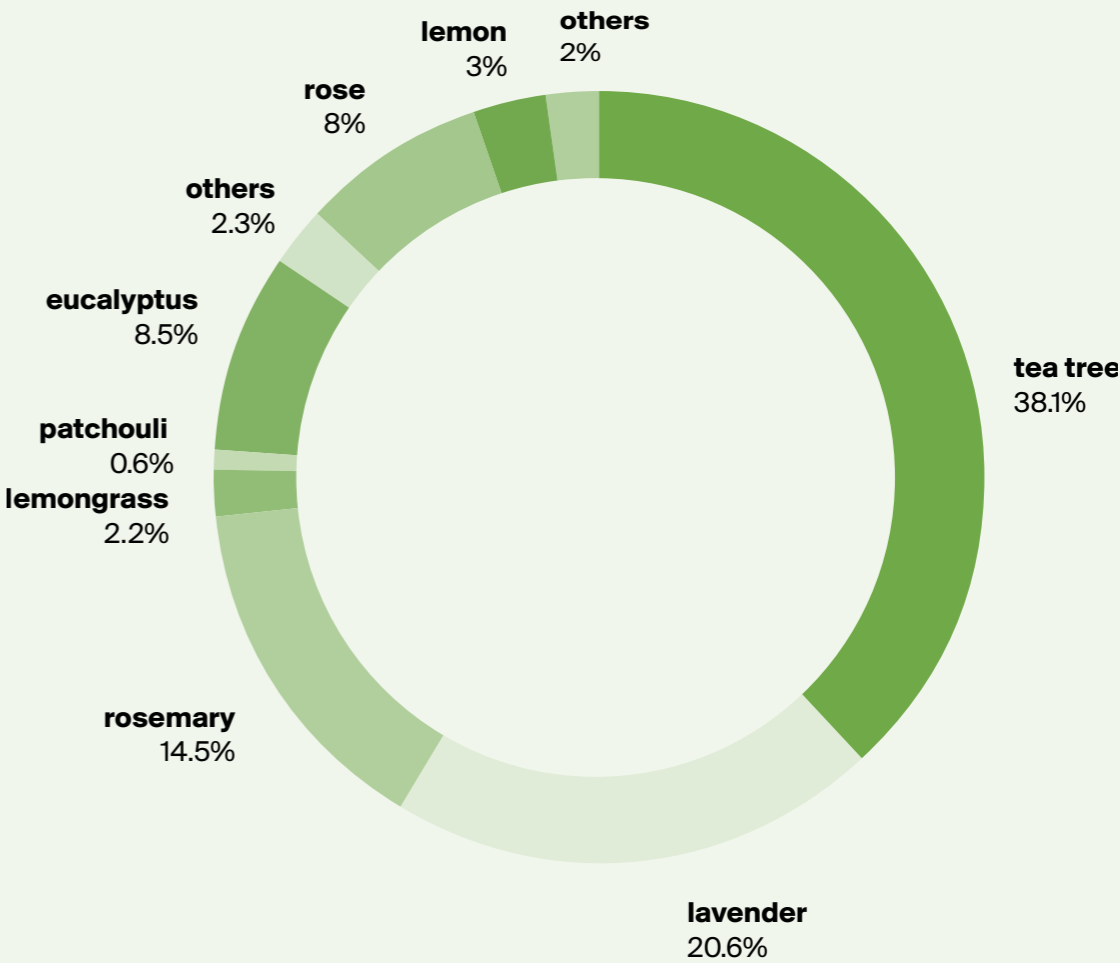
Of the average number of monthly worldwide searches about Artistic Perfumery, 0,84%, or 76k, refer to Sustainability. The chart further breaks down search specifics: vegan, zero waste, etc. Raw Ingredients includes types of natural ingredients like plants and flowers.

*other:

Aromatherapy

- More than 3.9M monthly searches referred to the aromatherapy topic
 - 1.4k online mentions referred to the topic of usage. During the period of February 2019 and March 2020, there's a relevant peak in conversations on the topic in November 2019, and from that month forward there is an increase in the topic itself.
- From November 2019 to March 2020 we registered 780 mentions on the aromatherapy topic which constitutes 56% of all mentions. Apart from the "common" words (fragrances, perfumes, etc.) and the words specific to the aromatherapy topic (aromatherapy, essential oils, etc.), we noticed that ingredients and cure-related words are mentioned (vanilla, rose, helps, health, power, hair, skin, etc.) as well as where to find products in the e-commerce world (website, online, shop, stores, sales, etc.).

The concept of using scent to treat "disease," is a centuries-old practice. Today searches prove that users want to learn more about how this powerful connection between scents and our brains can heal, soothe, delight, and be leveraged for health and wellbeing. We notice particular attention to cleaner and greener ingredients, where tea tree, lavender, and rosemary are the most quoted and loved thanks to their healing, soothing and relaxing properties. The final scope is to care and cure ourselves.



The chart shows the reason why people are searching online about aromatherapy: the therapeutic purpose is the main reason of searches

THE INTANGIBLE EFFECT OF PERFUMES

Seduction

*Pheromone perfumes are always more
searched on Google.*

Is it becoming a real trend?

*If yes, how are perfume brands responding
to this search trend?*

Seduction

— During the period of February 2019 and March 2020, there’s a peak in conversations on the topic from October 2019 to March 2020: it indicates an increase in interest in the topic itself.

Apart from the “common” words (like fragrances, perfumes, etc.) and the words referring to the generic topic (seduction, sensual, etc.), we noticed specific fragrance ingredients and components are mentioned.

**almost
24^k monthly
searches**

Referred to the seduction topic
(pheromones and attraction)

The theme of seductive perfumes is curated by brands, producers, and the media because end-users want to feel more confident: the final purpose isn’t seduction itself, but rather the mood boost that makes you feel better and more attractive to others.

**1.2^k online
mentions**

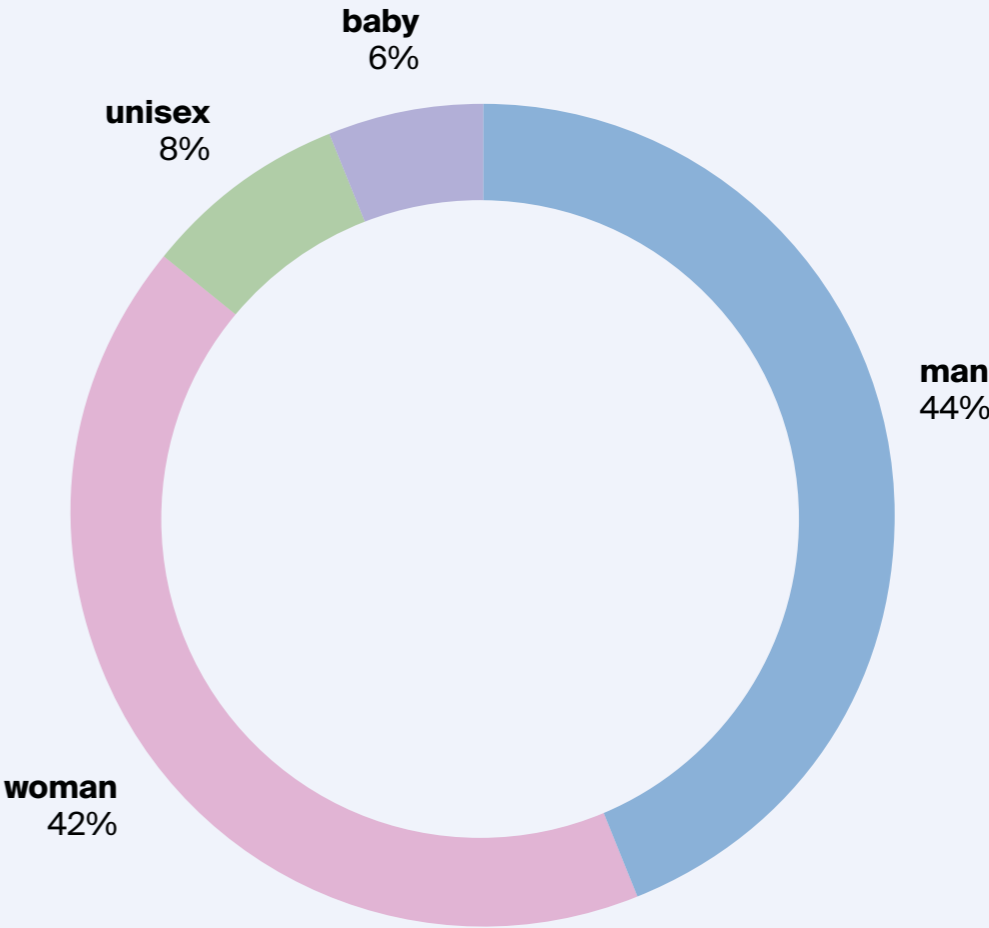
Referred to the seduction topic
(pheromones and attraction)

Gender

The beauty industry is all about labels, not just brand names, but labels such as “male” or “female” — dictating what you should buy. “For men” or “For women” are still the most searched labels but will this continue in the future?

— Almost 200k monthly searches and 25k online mentions referred to the topic of gender. Masculinity is still under the spotlight. However the theme of gender-free fragrances remains key and brands, producers and the media are taking note because end-users want to feel more free to express themselves without a label.

Unisex searches increased by 60% (150 searches/month in 2019 vs 240 in 2020). The product categories “for him” and “for her” are starting to sound passe. What’s important is to wear what you like, regardless of the gender label. Gendered fragrance is under radical review.



THE BUSINESS OF ARTISTIC PERFUMERY

E—commerce vs brick and mortar

*How is e-commerce on Artistic Perfumery perceived?
What is the relationship between brick and mortar stores
and online shops? Is the “price-theme” still relevant
in Artistic Perfumery?*

E-commerce vs brick and mortar

- Comparing the searches made on Google (IT+EN) over the past 12 months with the ones made during the previous period, there is clearly an increase of interest in the topic of e-commerce. Also, the theme of price continues to be relevant for users.

- Conversations on the brick and mortar topic mostly refer to in-store events and new store openings.

- Twitter is the most used channel: users tend to write about events on their personal profile.

- Professionals and experts monitor and comment on the increasing tendency of indie brands that find e-commerce to be a big opportunity for the industry (especially during Covid19).

- Individual users talk about the “e-commerce solution” in order to find cheaper products or products that aren’t available in physical stores. Finding Artistic perfumery on e-commerce is an emerging trend, but people are still used to visiting physical stores. This habit is in their DNA. Future commercial strategies will have to recognize that brick and mortar and e-commerce will continue to coexist for a long time. The crucial point to explore is: how will these two kinds of shopping coexist, helping and supporting each other, in order to properly serve consumers’ needs.

**255^k
monthly
searches**

Referred to shopping topics

4^k online mentions

Referred to shopping topics



Made in Italy

The “Made in Italy” label matters most to Italian vs other users. 80% of the conversations that refer to Made in Italy (672, or less than 1% of the total amount of conversations), are written by Italian users. United States, France, and Russia come behind Italy, but the frequency of these conversations is much lower than seen with Italian users. The most-used words refer to business and product quality. The people who mention “Made in Italy” typically do so to validate and insist on the quality of a product.

TAKEAWAYS

Future Consumers of Artistic Perfumery

*We have identified two new types
of behavioral clusters. They both care about
the “green” and sustainability trends.
Let’s meet them.*

The Curious

Ordinary people. Maybe they smelled a sample of a Floris' product. Or maybe they saw an interesting Artistic Perfumery store window while walking around and found it eye-catching, then wondering what was inside the shop.

How do they act today?

—
THEY ARE MAINLY ON FORUMS
AND TWITTER THEY PREFER TO “ASK”
INSTEAD OF “SAY”

THEY HAVE AN INTEREST
IN ARTISTIC PERFUMERY BUT
THEY STILL DO NOT FEEL CONFIDENT
ENOUGH TO JUMP INTO IT

THE KEY-TOPICS THEY FOLLOW ARE:
#NICHEPERFUMERY
#ARTISTICPERFUMERYBRANDS
#ARTISTICFRAGRANCES

Ethic-fluencers

Ethic+Influencers = EthicFluencers.
Influencers with an ethical point of view.
Ethical people that spread positive
messages, who use their social media
profiles to raise awareness among
other users.

How do they act today?

—
THEY CARE ABOUT GREEN THEMES
AND SUSTAINABILITY THEY ARE MAINLY
ON INSTAGRAM

THEY DON'T CARE ABOUT
POPULAR BRANDS AT ALL: SOME OF THEM
CREATE THEIR OWN BUSINESS

THE KEY-TOPICS THEY FOLLOW ARE:
#SUSTAINABILITY #INDIEBRAND
#HANDMADE #NATURAL

TAKEAWAYS

Evidence

Interaction: between brick and mortar & e-commerce

E-commerce is absolutely necessary for this industry during the pandemic. It's also a strong part of the strategy for new indie brands. But the consumer mindset is still linked to brick & mortar stores. How to create a win-win solution?

LET'S TAKE ACTION

CREATE A BLENDED EXPERIENCE: WHY THINK OF PHYSICAL AND ONLINE STORES AS "SEPARATE PLACES"? IT'S POSSIBLE TO CREATE INITIATIVES THAT ENGAGE USERS ONLINE, AND BRING THEM INTO THE B&M STORES AND VICE VERSA. #MUTUALSUPPORT

DIGITAL TOOLS: INTERACTION ALSO MEANS "INTERACTIVE TOOLS". ARTIFICIAL INTELLIGENCE MAY HELP US PROVIDE USERS WITH THE BEST ASSISTANCE EVER TO SEARCH FOR NEW PRODUCTS IN BOTH ONLINE AND OFFLINE CONTEXTS. #AI

Acceptance & Inclusivity

There's still skepticism about Artistic Perfumery. The overriding concern is: "Is Artistic Perfumery for anyone?" It's necessary to spread a message of acceptance and inclusivity.

LET'S TAKE ACTION

MOOD. IN A NON-AUTHORITARIAN AND SIMPLE WAY, WELCOME THOSE WHO ARE NOT EXPERTS, AND GUIDE THEM TO THE DISCOVERY OF ARTISTIC PERFUMERY. #WELCOME

TONE OF VOICE. SIMPLE WORDS MUST BE USED AS KEY-WORDS. IT'S POSSIBLE TO COMMUNICATE AUTHORITATIVE CONCEPTS WHILE KEEPING A FRIENDLY TONE OF VOICE. #UNDERSTANDABLE

NEW CHANNELS. IT'S NECESSARY TO ADOPT NEW DIGITAL — AND NON DIGITAL — CHANNELS THAT WILL REDUCE THE DISTANCE BETWEEN INDIE AND WELL KNOWN BRANDS AND THEIR POTENTIAL CONSUMERS. #INNOVATION

Methodology

Information and data presented in this Paper are collected and commented on by Essencional’s Editorial Board in partnership with Develon Digital.

Methodologies of analysis:

— WEB LISTENING Web listening is a methodology of analysis based on monitoring digital conversations in order to understand what is the reputation and/or the popularity of a brand or a topic online. This web listening project was carried out on the theme of Artistic Perfumery and its linked topics.

— SEARCH ENGINE TRENDS AND KEYWORD RESEARCH We’ve analyzed 1 year of searches in Google to uncover which are the most relevant and the most popular topics related to Artistic Perfumery. This allows us to identify the most searched themes by users, as well as the most common search patterns.

This update regards the period May 2019 – April 2020

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