

Wednesday  
June 15, 2022

12PM



# 2022 Essencional Observatory

## Economic trends and the state of artistic perfumery in the digital space

A research conducted by: **essencional:**  **develon**  
digital

**Silvio Levi** – Essencional Founder and Director

**Chiara Toniello** – Essencional Project Management

**Karen Marin** – Essencional Advisor & Contributor

**Marco Ricchetti** – CEO of Blumine & Essencional Economic Advisor

**Alice Rizzetto** – Head of Strategy Develon Digital

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# essencional:

Promoting innovation and high creativity in the development of Niche Perfumery and Cosmetics



## Esxence Strategic Partner

April 2019: “Whispers about artistic perfumery”  
Definition of Workshops for conference-hall and Webinars

## Online, Essencional.com

April 2020: launch of essencional.com  
Spreading knowledge about artistic perfumery: Original Content and Reposting of news and articles

## Study Center

Continuous monitoring, Surveys and analyses.

### Essencional Staff

Silvio Levi – Founder and Director  
Giulia Levi – Operation and Marketing  
Chiara Toniello – Project Management

### Essencional Advisor

Marco Ricchetti – CEO of Blumine & Essencional Economic Advisor

### Essencional Columnist

Karen Marin – Advisor & Contributor  
Laurence Klove – Advisor & Contributor

### Digital Partner

Alice Rizzetto – Head of Strategy  
Develon Digital

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# Big numbers

In this workshop we will compare mainly the collected data for period **March 2021/April 2022** mainly with those of the previous analyses “Artistic Perfumery in the Digital World” (2020-2021, Esxence on Air).

## 202K

mentions about Artistic perfumery, relevant Artistic perfumery brands.

### #WEBLISTENING

In our web listening, we analysed almost 202K conversations **in Italian and English.**

The United States has the highest share of conversations with an overall rate of 48%. Italy, as a comparison, is at 10% of the total.

## 56%

mentions only on artistic perfumery in general (without considering any brands).

### #WEBLISTENING

The number of conversations related to the general topic of artistic perfumery amounts to **114.3K** (both in Italian and English).

The most relevant subtopic refer to **type of products** and **sustainability.**

## 5.7 mln

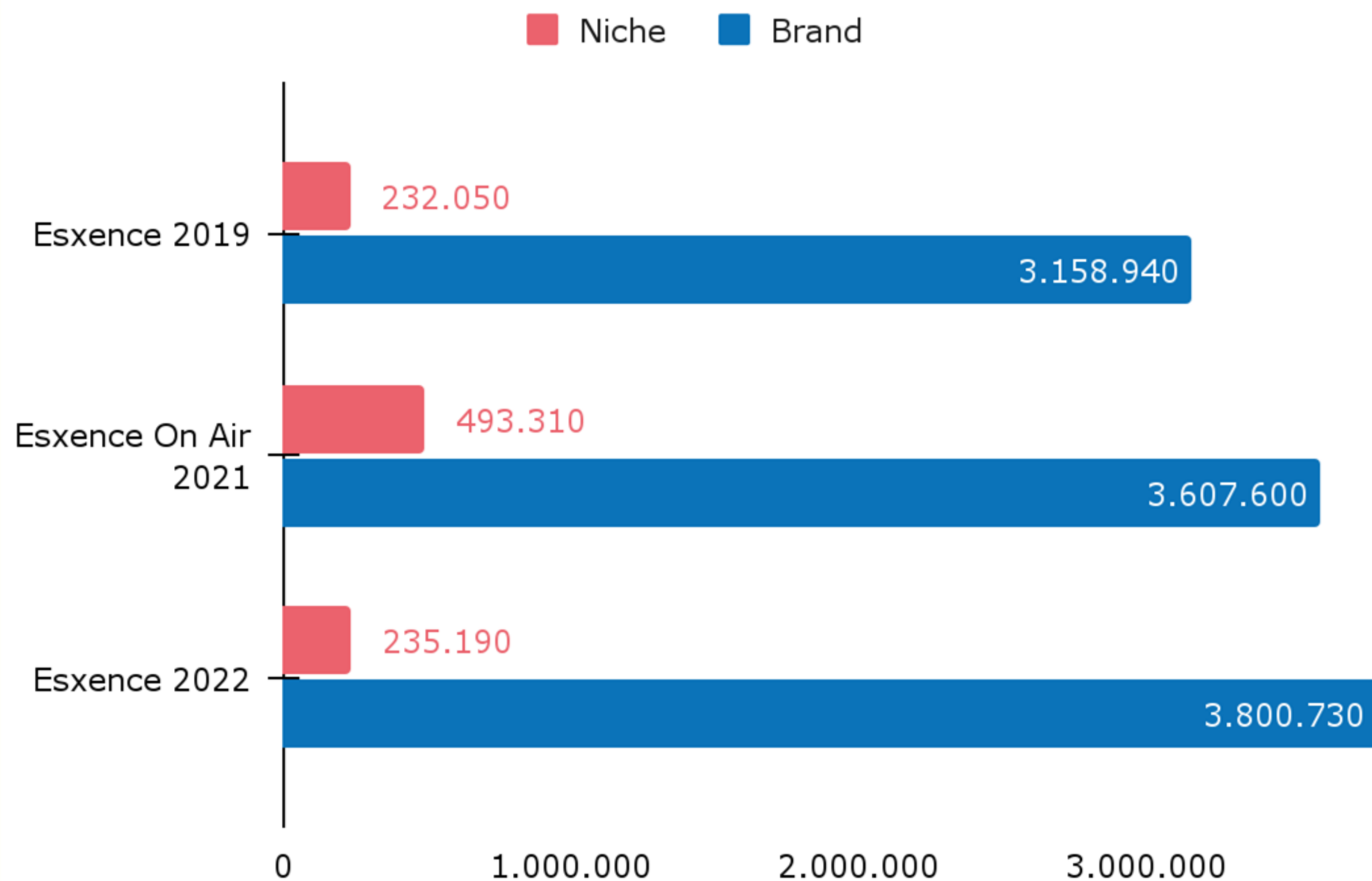
searches on artistic perfumery and all related topics and brands.

### #SEARCH

Among these searches, almost 4 millions refer to a famous artistic perfumery brand and its best-seller product.

The most searched product's type, after the perfume itself, is the **cologne for men.**

# More awareness for niche brands



**“NICHE” searches**

**+ 1,35 %**

EsXence 2019 vs EsXence 2022

**“BRAND” searches**

**+ 20 %**

EsXence 2019 vs EsXence 2022

**+ 14 %**

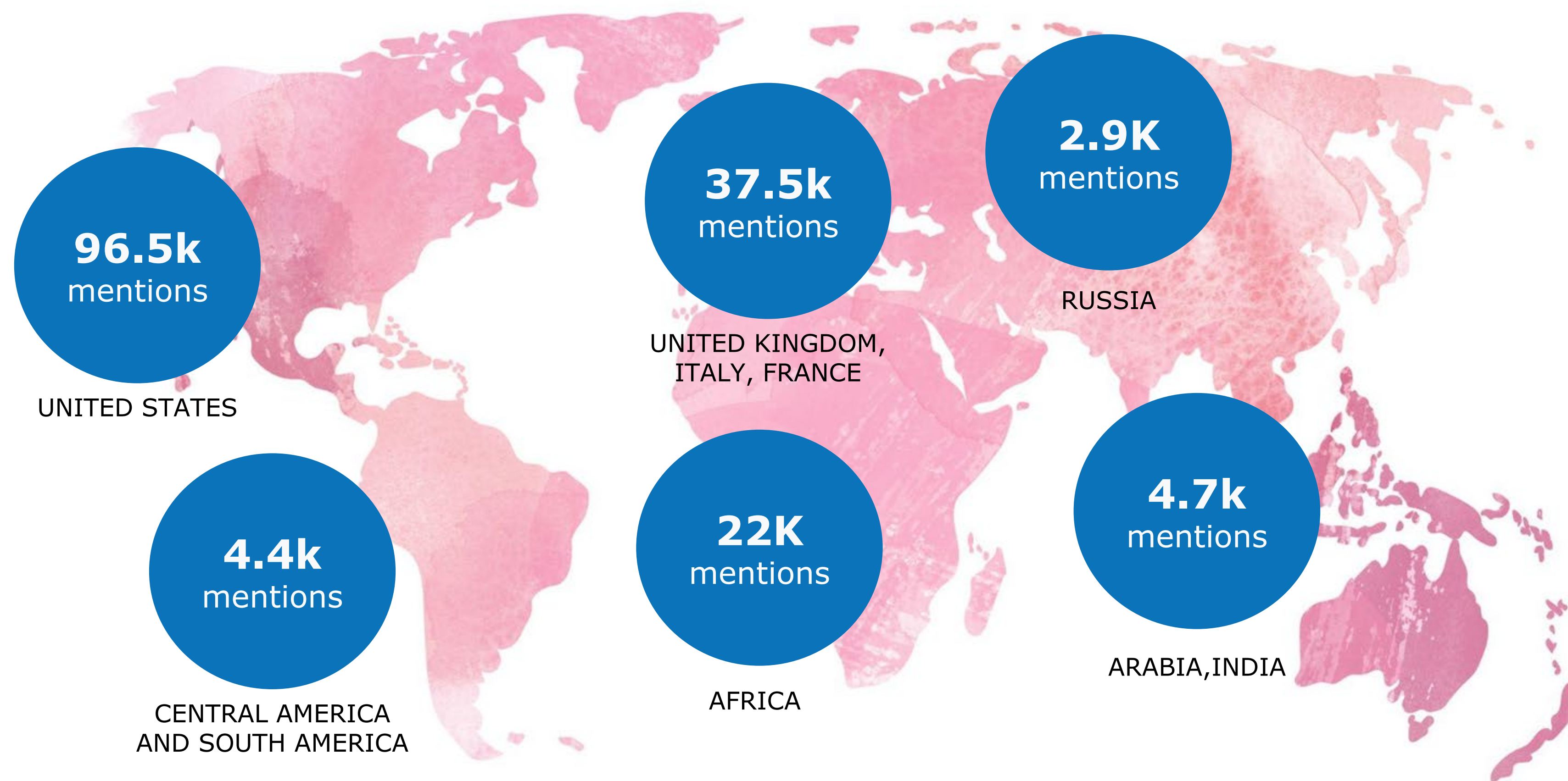
EsXence On Air 2021 vs EsXence 2022

**The search for generic terms related to niche perfume is being overtaken by the increase in specific searches on niche perfume brands.**

Thanks to the positive trend of searches, we deduce that users are starting to have a greater awareness of the topic of niche perfumery.

# Countries and conversations

The map below shows the countries with the highest volumes of conversations about **Artistic perfumery**. **United States are the countries with the highest conversations' increase: + 20k YoY**



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# Countries and conversations

The chart below shows the top 7 countries with the highest volumes of conversations about **Artistic perfumery** in 2022 compared to previous analysis. The United States, France and India show an increase in conversations.

Country	Esxence On Air 2021	Esxence 2022	DIFFERENCE %
United States	76.662	96.473	+26%
Italy	22.196	21.091	-5%
U.K	12.965	12.441	-4%
<b><u>Nigeria*</u></b>	<b><u>21.917</u></b>	<b><u>15.727</u></b>	<b><u>-28%</u></b>
France	3.723	3.961	+6%
Russia	3.005	2.913	-3%
India	1878	3.046	+62%

\* The increase in conversations in Nigeria last year was due to some articles and posts about the niche perfumery store **Seinde Signature** which generated buzz within the conversations. The decrease recorded this year is physiological. Last year's conversations in Nigeria without this "peak" is 11.904 mentions

\*mention of Esxence On Air 2021 not considering the peak of 10.013 related to the buzz

**11.094** +42%

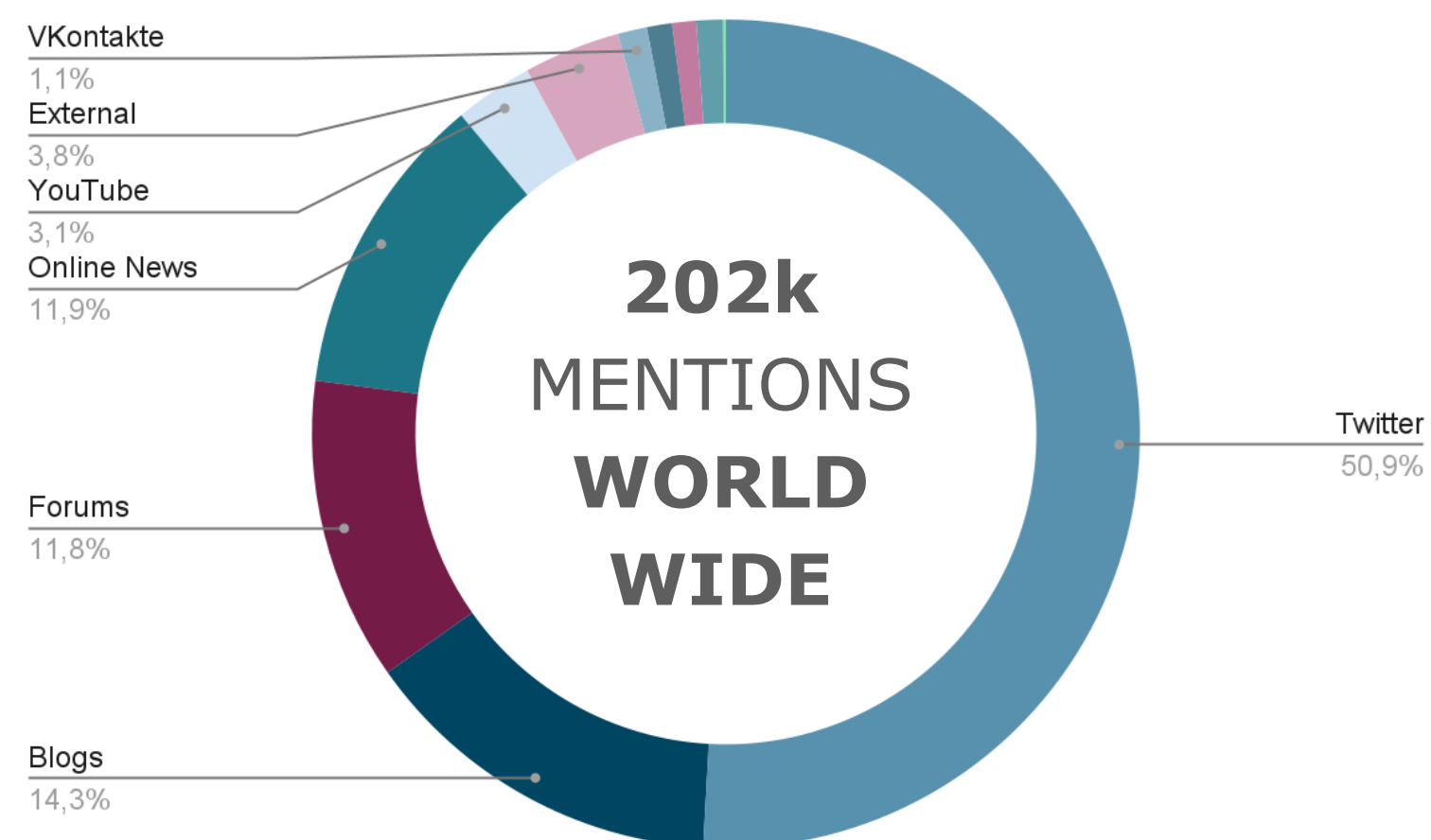
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*Canada, Ireland, South Korea, Perù, Egypt*  
**+3.000 conversations**  
**Substantial Increase in 2022**

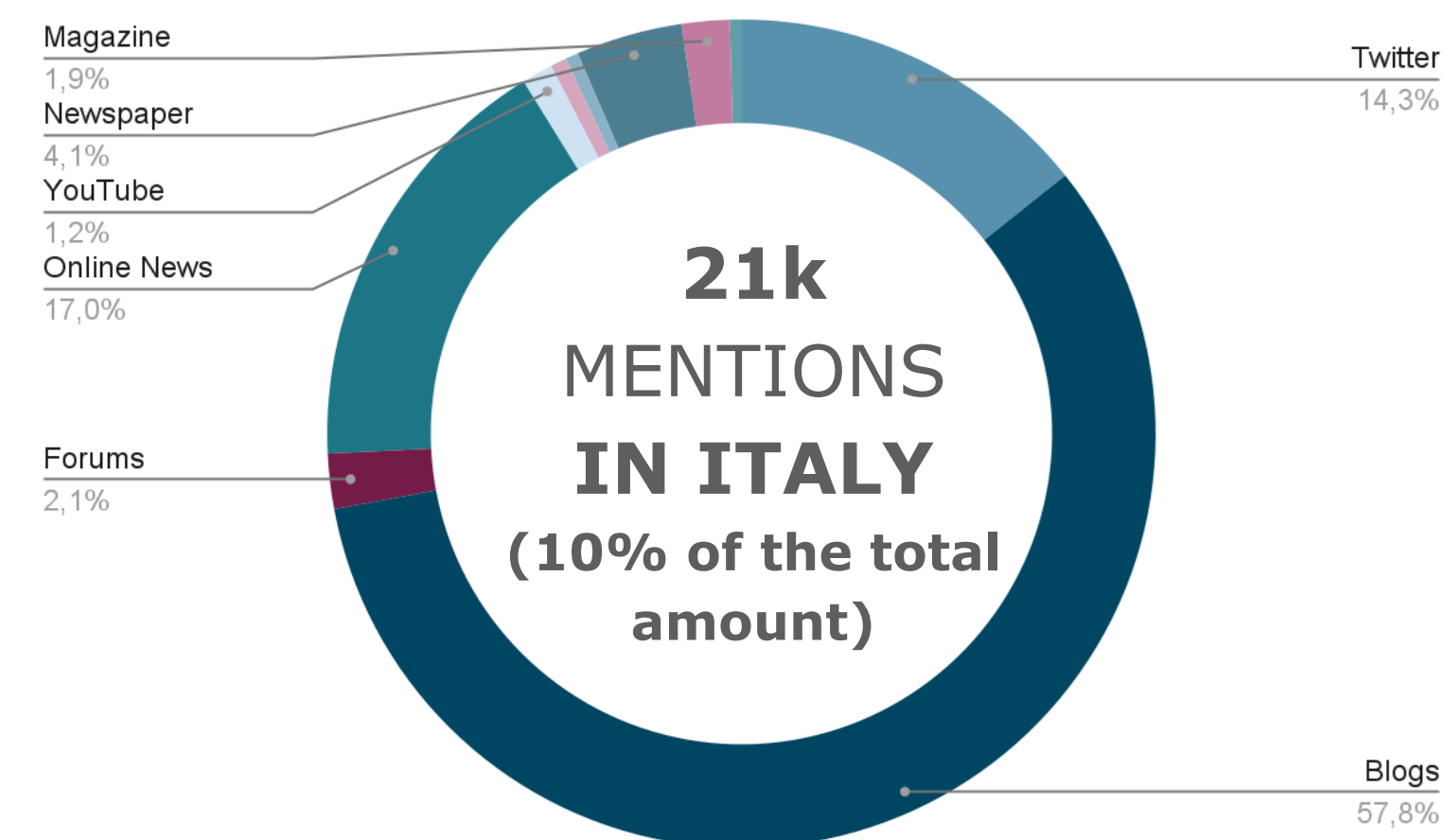


**COUNTRIES**  
*to keep an eye on*

# Digital channels



Among the most engaging digital channels chosen by users from all over the world to talk about perfumes we find **Youtube**, which registers a growth compared to last year **(+30%)**. Here we find a new format that originates from Tik Tok: short videos, not very descriptive, immediate and engaging.



**Online news conversations** related to the theme of artistic perfumery have grown **(+35,62%** vs Esxence On Air 2021).

YouTube is also growing compared to last year. **Video is also becoming an important medium for Italy to talk about perfumes.**

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# Focus on Social Media

## The fragrance surge

Online users are interested in fragrance on social media, but what types?  
According to the study conducted by Traackr, 3 categories emerged last year:  
**Clean Fragrance, Natural/Organic Fragrance, Luxury Fragrance**

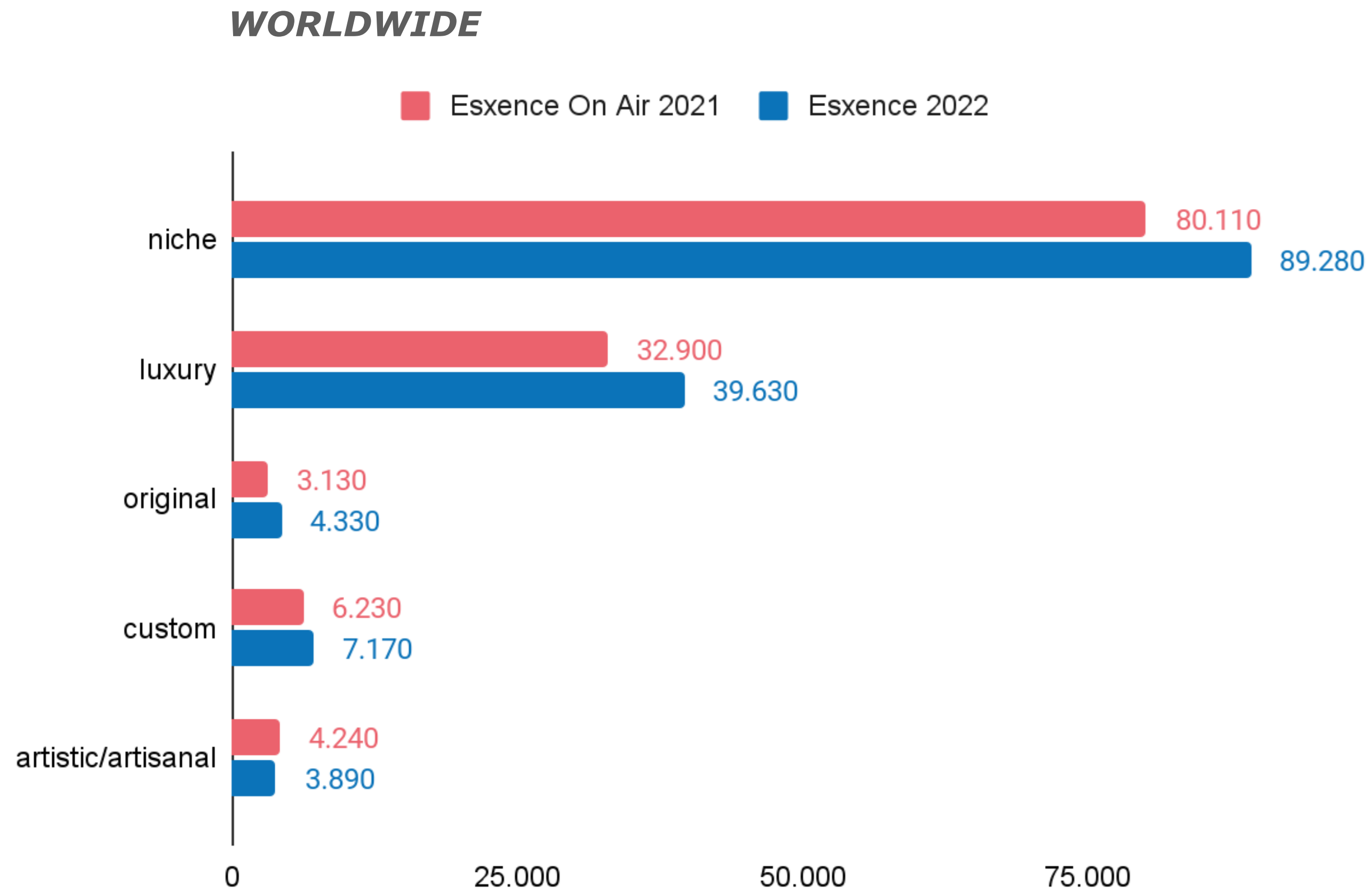
HASHTAG	TIK TOK	% variation of TIKTOK hashtag VIEWS 2021 vs 2022	INSTAGRAM	% variation of Instagram hashtag USE 2021 vs 2022
#nichefragrance	36.8M	+922%	337K	+50%
#nicheperfume	25.0M	+4.618%	712K	+38%
#luxuryperfume	15.6M	+3.007%	267K	+44%
#profumeriaartistica	4.2M	+37.738%	197K	+238%
#nicheperfumes	2.8M	+950%	120K	+12%
#nicheperfumery	1.1M	+754%	88,1K	+9%
#artisticperfumery	899	+27%	19,8K	+44%

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# Niche = Luxury: a false myth

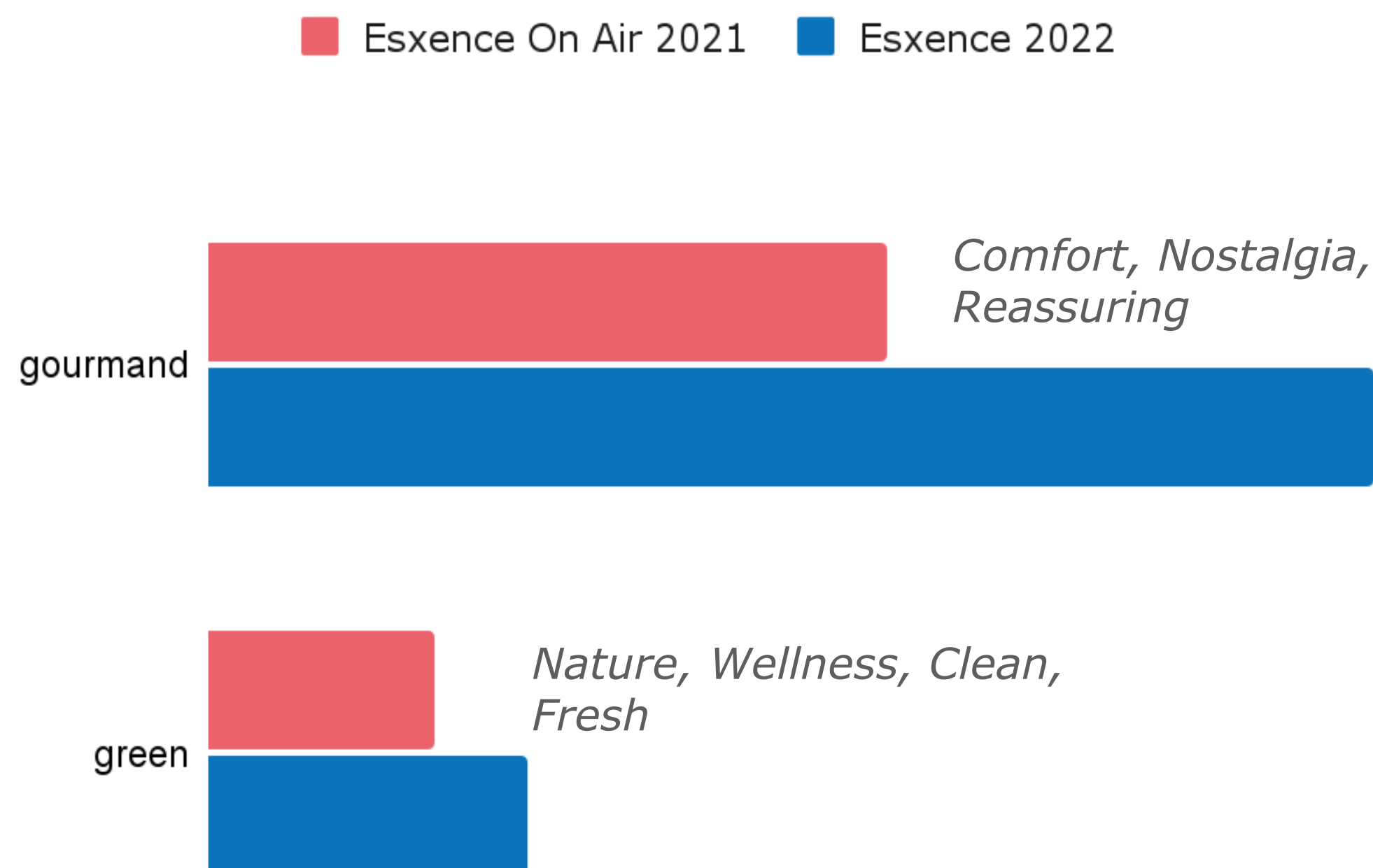
**Artistic perfumery** is mostly regarded and searched for by users as a "**niche**", increasingly associating it with the term "**luxury**".



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# Green & Gourmand

We found the preference for green and gourmand fragrances in last year's survey. The trend of interest was confirmed in the increase in searches detected this year.



	Esxence On Air	Esxence 2022	Difference %
<b>gourmand</b>	<b>13.200</b>	<b>19.430</b>	<b>42%</b>
<b>green</b>	<b>3.760</b>	<b>5.300</b>	<b>41%</b>

A **Gourmand fragrance** is a perfume composed of synthetic edible notes, such as coffee, honey, cotton candy, etc.

**Green fragrances** evoke herbal notes such as tea leaves, herbs and aquatic plants.

# Questions and reassurances

Keyword	Esxence On Air 2021	Esxence 2022	DIFFERENCE %
how to make perfume	33.100	27.100	<b>-18%</b>
<b>how to apply cologne</b>	<b>6.600</b>	<b>12.100</b>	<b>83%</b>
<b>best perfumers in the world</b>	<b>8.100</b>	<b>9.900</b>	<b>22%</b>
how long does perfume last	8.100	8.100	<b>0%</b>
best mens niche summer fragrance	8.100	8.100	<b>0%</b>
<b>how to apply perfume</b>	<b>4.400</b>	<b>6.600</b>	<b>50%</b>
<b>which perfume is best</b>	<b>3.600</b>	<b>6.600</b>	<b>83%</b>
<b>how to put on cologne</b>	<b>3.600</b>	<b>5.400</b>	<b>50%</b>
<b>where to put perfume to last all day</b>	<b>3.600</b>	<b>5.400</b>	<b>50%</b>
<b>how to use perfume</b>	<b>3.600</b>	<b>4.400</b>	<b>22%</b>
<b>what perfumes are vegan</b>	<b>3.600</b>	<b>4.400</b>	<b>22%</b>
<b>best mens niche fragrances</b>	<b>1.900</b>	<b>3.600</b>	<b>89%</b>
<b>where should you spray perfume</b>	<b>1.900</b>	<b>3.600</b>	<b>89%</b>
<b>best luxury men's cologne</b>	<b>2.400</b>	<b>3.600</b>	<b>50%</b>
<b>best perfume company in the world</b>	<b>2.900</b>	<b>3.600</b>	<b>24%</b>
<b>which is the most expensive perfume in the world</b>	<b>1.900</b>	<b>3.600</b>	<b>89%</b>
<b>how long does cologne last</b>	<b>2.400</b>	<b>2.900</b>	<b>21%</b>
<b>how to apply men's perfume</b>	<b>50</b>	<b>2.900</b>	<b>5.700%</b>
how to make cologne	2.900	2.900	<b>0%</b>
how to make your own perfume	2.900	2.900	<b>0%</b>

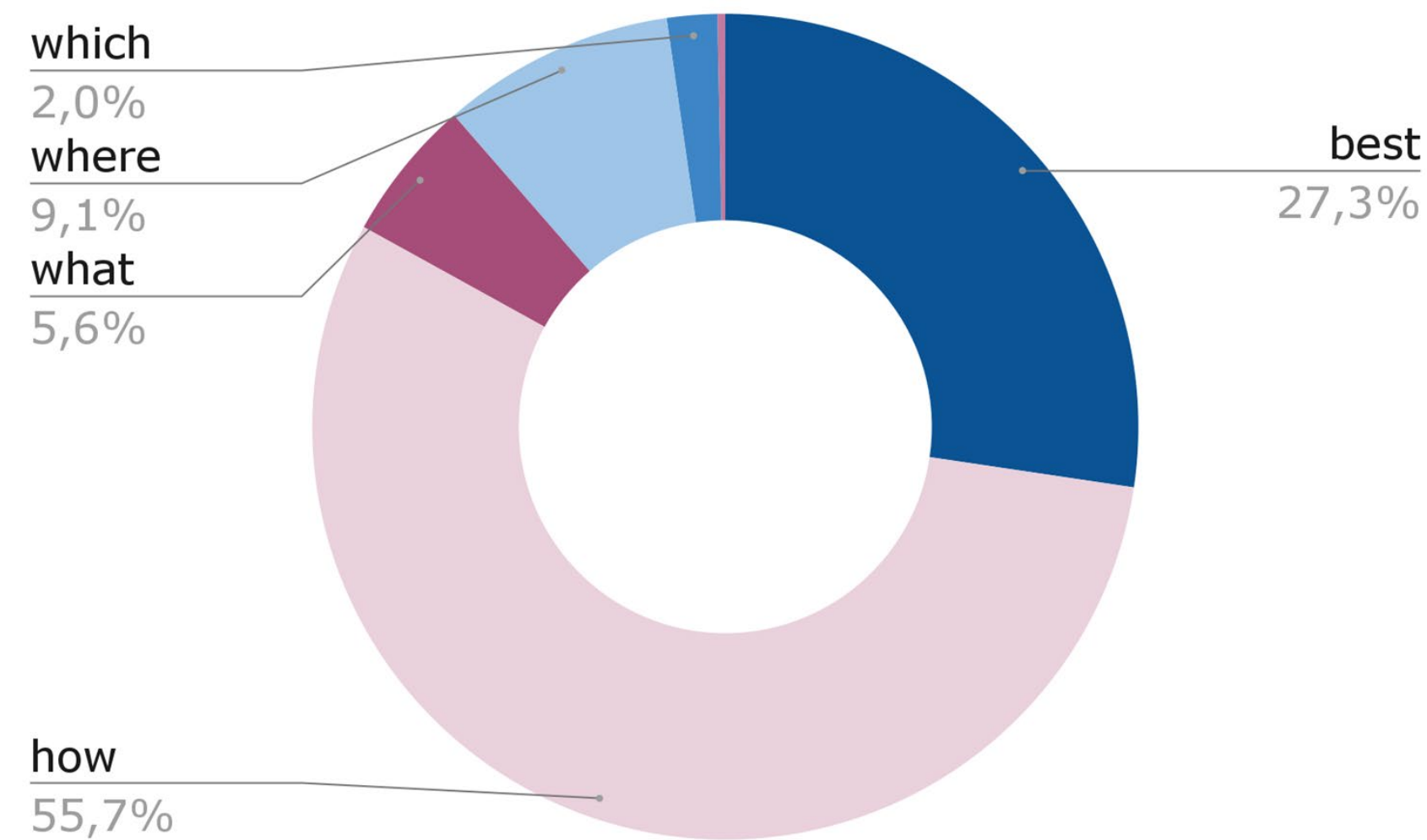
Compared to last year there is **less demand** for making DIY perfume.

Instead, users **express curiosity** about **knowing more about niche perfume** without acting as self-taught.

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# Question and reassurances

## How, Best, Where, What, Which



- Every month there are more than 273 thousand searches for users who ask for information and reassurances on the web - **vs previous analysis is +25%.**
- **How, best** and **where** are still the most common used in searches.
- There is an important increase of searches with the keyword **WHERE**. This data demonstrate that users are always more interested in:
  - WHERE to **find/buy** fragrances
  - WHERE to **apply** perfume

Keyword	Esxence On Air 2021	Esxence 2022	DIFFERENCE %
how	126.290	152.700	+21%
<b>best</b>	<b>49.450</b>	<b>74.990</b>	<b>+52%</b>
<b>where</b>	<b>15.640</b>	<b>25.040</b>	<b>+60%</b>
what	14.260	15.250	+7%
which	13.090	5.390	-59%

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# Best seller brands and type of products

**3.8mln** +51,3% YoY

There are 3.8 million searches each month for a niche brand or product .

These is a **single brand** that generates  $\frac{1}{3}$  of the **total searches**, but also minor brands are increasing from last year.

**This means that niche perfumery and its brands are becoming increasingly popular.**

"Perfume" is still the most searched-for product type, followed by **"cologne"** (a trend also confirmed by the volume of conversations).

Keyword	Excence On Air 2021	Excence 2022
perfume	562.000	729.030
cologne	226.000	307.070
aftershave	61.930	53.920
soap	2.380	2.210
eau de toilette	1.860	2.480
shaving cream	1.040	980
shampoo	300	340
shower gel	710	940
razor	210	170

% variation between On Air 2021 and Esxence 2022

+30%

+36%

-13%

-7%

+33%

-6%

+13%

+32%

-19%

## TYPE OF PRODUCT

# Ride the wave: the trend in hair care

### Online mentions about SHAMPOO: +225% YoY

*Increase in mentions compared to the 2020 analysis, a trend that is also confirmed by the increase in online searches.*

In recent years, the world of artistic perfumery has expanded its range of products by focusing on the beauty sector: body creams, soaps and hair perfumes.

### These are just a few examples of market response, but what will the future be in this trend?

Hair-care category revenue grew by **8%** in **2020 versus 2019**.

From January through August 2021, **hair product sales increased by 55%**, versus last year.

The global hair care market is expected to grow of **+6,6%** for the forecast period (2022 - 2027).

# Sustainability: is it a false myth?

36.3k

online **mentions** referred to the ECO-SUSTAINABILITY AND INGREDIENT TOPIC  
Registered on the past 14 months.

**+155,63%** YoY

Last year were 14.200 mentions

*Is packaging "enough" to convince the user that a product is sustainable?*

*Are users convinced to buy a fragrance because it is declared sustainable?*

Conversations reveal a general scepticism about sustainability on behalf of users.

The beauty sector formalising this commitment further by means of **certifications (Benefit Corporations) and awards.**

49.4K

monthly **searches** referred to the ECO-SUSTAINABILITY AND INGREDIENT TOPIC  
Worldwide English language-keyword, registered on the past 14 months.

**+62,96%** YoY

Last year were 30.320 searches

COTY allegedly starts making sustainable Fragrances and Perfumes.



Essence-tially Dacob shared a video

...AQUOLINA CHOCOLOVERS <https://youtu.be/mdn2pbbgskU> #coty #perfume #greenwashing #parfum #extrait #niche #nicheperfume #testingperfumes #perfumereview #fragrancereview #scentreview #fragrancetalk #superdacob #dacob #essencetiallydacob Stock video...

## SUSTAINABILITY

# Upcycled and fashion: what's about beauty?

**Upcycled, clean, certifications are just a few concepts on the subject of sustainability that can be found in both the beauty and fashion industries.**

Upcycling is generally understood as a design-based circular fashion approach, where pre- or post-consumer textile waste material is repurposed to create new garments.

79

mention on "upcycled fragrance"  
Esxence On Air 2021

394

mention on "upcycled fragrance"  
Esxence 2022

**+398,73%**

***Upcycled fragrances** are the result of utilizing products that would otherwise wind up discarded or decomposed.*

***Upcycled** is not only related to the creation of fragrances but also to the reuse of **waste materials to make packaging.***

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# What happened during the pandemic in the world of artistic perfumery: **new trends or a "bubble"?**

## HOME FRAGRANCE

Esxence 2022  
**374.420**  
 searches

**-14,13%**

Esxence On Air 2021  
 436.050  
 searches

But there is an increase in relation to some specific queries such as **'home luxury scent' (+19%)**, **'better world fragrance house'**, **'scent diffusers for home'(+30%)** and **'home candle'**.

## PERFUMERY SCHOOL

Esxence 2022  
**75.140**  
 searches

**+8,15%**

Esxence On Air 2021  
 69.480  
 searches

Not only an increase in searches for perfume schools...  
 A growing trend is represented by online courses - especially on mentions - and **workshops**.

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# What happened during the pandemic in the world of artistic perfumery: **price, opinions, ecommerces**

Comparing the searches carried out on Google (IT + EN) in the last 12 months with those carried out in Esxence On Air 2021, we can clearly see an **increase in users' interest in prices and opinions.**

20.1k

Searched/Month  
Esxence On Air 2021

25.8k

Searched/ Month Esxence  
2022

Searches for **PRICE** topic

**+28%**

8.2k

Searched/Month  
Esxence On Air 2021

10.3k

Searched/ Month Esxence  
2022

Searches for **OPINION** topic

**+26%**

**No boundaries between digital and physical.**

The highest increase in searches is about **GENERIC** searches for "places", not online or offline, where to buy fragrances.

6.2k

Searched/Month  
Esxence On Air 2021

8.9k

Searched/ Month Esxence  
2022

Searches for **GENERIC** store where to buy fragrances

**+43%**

493.5k

Searched/Month  
Esxence On Air 2021

657.5k

Searched/ Month Esxence  
2022

Searches for **Online** store where to buy fragrances

**+33%**

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# FORECAST

## Esxence On Air 2021

Test + Covid restriction = **innovation**

Average increase of **911%** in the past 3 years for searches referred to perfume's test and quiz.

**+93%**

Online searches about "TEST"  
Esxence On Air 2021: 9.910  
Esxence 2022: 19.000

DIY and HOW TO

**Almost 100k monthly searches about this topic** (where to apply perfume, how to make perfume)

**+27%**

Online searches about "HOW TO"  
Esxence On Air 2021: 120.000  
Esxence 2022: 152.700

Hungry for knowledge

Mentions about perfume schools and courses are **increasing of 100%** year on year.

**+71%**

online mentions  
Esxence on Air 2021 > Esxence 2022

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# Trends to keep an eye on

What should we expect  
in the next months about the  
world of **Artistic Perfumery?**

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## How to tell **sustainability** concept in a **reliable** way

#SUSTAINABILITY

**49.4K**

monthly **searches** referred to the  
ECO-SUSTAINABILITY  
AND INGREDIENT TOPIC

#UPCYCLED PERFUME

**394**

mentions on “upcycled  
fragrance”

T @ladytofglencoe retweeted an image



RT @MemoizePerfume: Sustainability is a core value of Memoize London. We're constantly learning and looking at new ways to protect the environment and keep impact as low as possible in the production of our **luxury fragrances**. #Perfume #Fragrance #Scent #InternationalDayOfPreservation pic.twitter.com/kCfH6LosDI

COTY allegedly starts making sustainable Fragrances and Perfumes. Are they greenwas...



Essence-tially Dacob shared a video

...AQUOLINA CHOCOLOVERS <https://youtu.be/mdn2pbbgskU> #coty #perfume #greenwashing #parfum #extrait #niche #nicheperfume #testingperfumes #perfumereview #fragrancereview #scentreview #fragrancetalk #superdacob #dacob #essencetiallydacob Stock video...

I'm A Sustainable Journalist & Clean Beauty Confuses Me Too - Refinery29

sophia li created a post

“As confusing as this space is, I'm still a believer in the movement that clean-beauty marketing launched: the movement that encouraged consumers to be more intentional in their purchases and to consider how their purchases impact the environment...”

# Trends to keep an eye on

What should we expect  
in the next months about the  
world of **Artistic Perfumery**?

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## Take it **SAMPLE**

Samples are never out of date and, if used correctly,  
can be a powerful tool for building customer loyalty.

#SAMPLE & DISCOVERY SET

**6.2k**

mentions on "sample"

#TRY IT FIRST

**1/20**

#SEARCHES FOR EDUCATION

**75.1k**

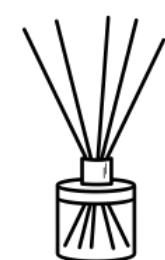
searches/month for perfumery schools

# Trends to keep an eye on

What should we expect  
in the next months about the  
world of **Artistic Perfumery?**

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## More than "eau de parfum"



**home fragrance**  
3.7k mention



**candle**  
3.3k mentions



**diffuser**  
1.1K mentions

**"Home luxury scent"**  
recorded an increase  
of **+179,31%**  
compared with Esxence On Air 2021.

### HAIR CARE

**+6,6%**

The expected grow of hair care market in the forecast period (2022-2027)

Wednesday  
June 15, 2022  

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**THANK YOU**  
**FOR THE ATTENTION**

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