

Forward Thinking: Fragrance Frenzy

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Fragrance Overload

The fine fragrance market is flooded with products and it seems new launches are introduced more frequently. “An ongoing challenge, which continues to increase over the years, is the overcrowded, oversaturated fragrance marketplace. It is predicted that more than 2,400 new fragrances will launch in 2016, the highest amount of any year to date. That is on top of the 10,000 scents already out there!” said Sniffapalooza founder Karen Dubin. According to Michael Edwards’ *Fragrancesoftheworld.info*, in 2015 more than 2,000 new fragrances were launched compared to 57 in 1984, which was the first year the *Fragrances of the World* guidebook was published.¹

“As we all know, the fragrance industry has been plagued with hit or miss product launches and unfortunately only a small fraction survive,” added Bart Schmidt, managing partner at Brands With Purpose. Vying for consumers, market activity is being driven by genderless fragrance directions, fragrance books, attention grabbing packaging, store experiences, sampling and technology.

Gender Bender

Unisex or shared fragrances now termed “genderless,” are gaining popularity. Schmidt said, “Since fragrances really don’t have a gender, I like that the genderless movement, which started in niche and was made mainstream by Calvin Klein, is continuing. Women have been wearing men’s fragrances for a long time, and I’m happy to see that brands like Le Labo are encouraging men to wear more floral scents such as Rose 31 and Lys 41.”

Gender-neutral fashion statements on the runway and the publicity of transgender Caitlyn Jenner, formerly Bruce Jenner, are pushing the boundaries of gender specific products. According to Michael Edwards, in 2015 unisex fragrances made up 29% of total fragrances launched last year versus 17% of total fragrances launched in 2005.² Brands across all distribution channels are rolling out genderless fragrance introductions, many of which are targeting younger, millennial consumers.

CK One’s 1994 launch popularized shared fragrances. In February, Coty introduced **Ck2** as a follow up. The “urban



woody fresh” scent is described as “one gender-free fragrance for a man or a woman, without prejudices, to unite and create an experience that can be shared together in love, lust and friendship.” **Frankie**, named after singer Ariana Grande’s brother, is a limited-edition unisex fragrance “for him, her and everyone!” Notes include pink pepper, pear, apricot, wild orchid, cedar, sandalwood, musk and sugar crystals.

Recognizing the opportunity for a gender-neutral fragrance, Chanel launched its first unisex scent **Boy Chanel**. In March, the scent was introduced exclusively in Chanel’s beauty boutique in Paris and is set to rollout to 240 stores worldwide this month. Created by Olivier Polge, the intention was “to create a very masculine scent that women would want to wear.” Named after Arthur Capel, nicknamed “Boy” and best-known for being Gabrielle Chanel’s lover, the fragrance is formulated with lavender, rose geranium, lemon, grapefruit, rose, orange blossom, sandalwood, heliotropin, vanilla and musk.

Les Eaux by Caron is a new genderless collection crafted by perfumer Richard Fryasse, which debuted in the U.S. in May and is available in select Lord & Taylor stores. **L’Eau Cologne** “is an invigorating fragrance” with notes of bergamot, yellow mandarin, Paraguay petit grain, rosemary, cedarwood, vetiver and musk. **L’Eau Pure’s** airy composition features bergamot, lime, nutmeg, coriander, cedarwood and guaiac wood.

Not specific to genderless scents, Schmidt sees “layering” as another positive development in fragrance. “Started years ago by Jo Malone and now being popularized by beauty editors, brands such as Commodity and Demeter are marketing layering scents,” Schmidt stated. For example, Commodity provides consumers with a **Cocktail Kit**, which features 10 eau de parfum

¹<http://www.basenotes.net/perfumeneeds/3299-michael-edwards-fragrances-of-the-world-2016-adds-over-2-000-launches-from-last-year>

²https://www.instagram.com/p/BC_sQ41TFNXI/?taken-by=fragrancesoftheworld&hl=en



Demeter DIY Foolproof Blending Tool Kit allows consumers to create their own custom scents.

fragrances and has a clever “Take It Neat or Mix A Cocktail” tagline. Demeter offers **Foolproof Blending Duo** and **Trio** kits, which highlight scents that “can be mixed together successfully in almost any proportions.” For DIY customers, Demeter offers a **Foolproof Blending Tool Kit** with a fragrance funnel, six droppers, blending strips and a one ounce refillable bottle with pump, cap and customizable label. **Mix-o-logic**, which is currently online with plans for retail distribution, offers eight perfumes that can be blended for a customized perfume.

Book Worm

Industry professionals and consumers are intrigued by the history and science of fragrance and flavor. “Consumers have become more educated and braver about trying different fragrances. With the internet and books they have access to all sorts of information to help them learn about notes, ingredients, classification categories, perfumers, and the huge variety of brands available. This knowledge absolutely helps drive fine fragrance sales,” said Dubin.

In collaboration with U.S. publishing house, Abrams, and French publishing house, Editions de La Martinière, Givaudan recently published *An Odyssey of Flavours and Fragrances*. According to a Givaudan press release describing the book, “five authors express the philosophical, historical, scientific and literary aspects of an industry.” Paolo Pelosi, a leading scientist in olfaction, released the *On the Scent* book published by Oxford University Press in May. The book “weaves together an engaging and remarkable account of the science behind the most elusive of our senses.”

In partnership with Simon & Schuster UK, Jo Malone, the British perfumer and powerhouse behind the namesake brand, has written a biography called *Jo Malone: My Story*. Expected in September, the book “explores how Jo’s fascination with smell teamed with her natural ability to create world-famous blends such as ‘Lime, Basil & Mandarin,’ revolutionized the way we think about fragrance.”

Attention Grabbing Packaging

Research suggests that brands have seven seconds to make a first impression.³ With all of the competition in the market,

³ <http://www.packageinsight.com/blog/how-product-packaging-influences-consumer-buying-decisions>

packaging is an important touchpoint used to grab the consumers’ attention. In the sea of fine fragrance launches, this year marked a variety of memorable packaging standouts.

Inspired by an everyday object, Jeremy Scott created the **Moschino Fresh Couture** package, which looks like a bottle of Windex.⁴ The fragrance is a woody floral and Scott describes the packaging as “the ultimate dichotomy of high and low.” Another interesting package inspired by a recognizable object is Marc Jacobs’ **Decadence**. Resembling a purse, the bottle features a green python print top adorned with a gold chain and black tassel. Marketed as a woody scent, Decadence is formulated with base notes of vetiver, papyrus woods and liquid amber. This year, **Barbour**, the British megabrand known for its trench coats, launched **For Her** and **For Him** fragrances. Both fragrances are packaged in etched bottles, “inspired by Barbour’s iconic diamond quilt design.”

Love Is On is the latest launch from Revlon. It is the brand’s first fragrance release in nearly 10 years. The scent is housed in a red glass bottle shaped like a heart, which also looks like a profile of lips. According to the company, the product is “designed to spark the chemistry between two people, and the seductive scent ignites attraction and inspires love.” Classified as a new “gourmand vetiver” scent, **Angel Muse** by Thierry Mugler highlights a hazelnut cream signature accord and joins the original 1992 Angel fragrance. Angel Muse’s bottle design is self-described as a “cosmic pebble” that emphasizes a silver metal ring placed around a nude amber glass oval with the iconic star.



Love Is On is housed in a red glass heart-shaped flacon, which also looks like a profile of lips.

Sun Shake is the newest addition to Jil Sander’s Sun fragrance line. Housed in a clear bottle, the fragrance is a bi-phase formula with two tones—yellow and pink. Designed as an interactive product, the consumer shakes the bottle and the blend becomes a coral color resembling a tropical cocktail. The scent is the same in both parts and contains notes of bergamot, mandarin, lemon peel, pink grapefruit zest, frangipani, heliotrope, woods and musk. It takes less than 90 seconds for the colors to separate and the product remains mixed when shaken until the product is depleted.

A Scentual Store Experience

Several fragrance centric retail stores are trying to capture and engage their consumers through sensory experiences. In February, perfumer Frederick Bouchardy opened the brick and mortar shop for Joya fragrance house in Brooklyn, New York.

⁴ Windex is a registered trademark of S.C. Johnson & Son, Inc.



Brooklyn-based Joya's first-ever flagship shop is part concept shop, part retail gallery and part production facility, which features tours, workshops, salons, master classes with visiting perfumers, and art installations.

Part concept shop, part retail gallery and part production facility, **Joya Studio's** 2,000-square-foot space is used for tours, workshops, salons, master classes with visiting perfumers, and art installations.

In April, Kuwaiti perfume house **The Fragrance Kitchen**, launched its first U.S. outpost in the beauty department of Bergdorf Goodman. The brand features more than 40 fragrances, which are inspired by founder Sheikh Majed Al-Sabah's childhood memories and experiences. **A Rose With A View** was specifically created for Bergdorf's and highlights rose, violet, white flowers sandalwood, patchouli and musk.

Last summer, Stockholm's **Byredo** founder and creative director Ben Gorham introduced a 1,345-square-foot namesake boutique in New York's SoHo neighborhood. Based on the idea to "translate memories into smells," Byredo's original four signature fragrances launched in 2006. Now, Byredo carries more than 30 fragrances and the line includes body care products and home fragrance. The store also sells leather bags and eyewear.

In the fall of 2015, **Hermès Parfumerie** opened its first New York boutique in Brookfield Place, the upscale mall connected to the World Trade Center. To create a multisensory experience inside the 1,000 square-foot space, which uses design accents of concrete, marble, leather and wood, Brooklyn-based artist Daniel Gordon created projections, which simulate the illusion of a "concrete jungle" with plants, trees and flowers. In conjunction with the store opening and inspired by Manhattan flower stands, perfumer Céline Ellena designed **The Shop Around the Corner** candle made with white flowers and eucalyptus.

At the end of last year, **Frédéric Malle** launched his first-ever in-store boutique at The Chicago Neiman Marcus department store. Mimicking fragrance suppliers' labs with stable environments for fragrances, the perfumes are refrigerated and the boutique features a "smelling booth cabin." Malle plans to introduce more in-store boutiques at Neiman's as well as open five to 10 in-store boutiques and freestanding stores in the Middle East in 2016.

Paris-based luxury candle maker, **Cire Trudon**, opened its first flagship shop in New York's Nolita neighborhood in December 2015. The company was founded in 1643 and is the oldest candle company in the world. The cozy store is lined with mirrors, burgundy walls and floors and displays domed glass capped candles. It also offers a variety of room sprays and

scented matches. According to NY Racked, the store's playlist is made up of a collection of songs that represent each of the brand's 25 scents.⁵

Named after Louis XV of France's Château de Marly, French brand **Parfums de Marly** introduced its first New York City boutique in the Meatpacking neighborhood in March. Known for perfumes and candles, the store offers a variety of scents inspired by "the splendour of the XVIIIth Century, when the finest perfumes were created for King Louis XV as a tribute to the prestigious horse races he so fervently admired." The new men's/unisex fragrance **Layton** just launched. Parfums de Marly plans to expand with a new Dubai store set for the fall followed by Moscow in 2017.

Laundress, the eco-friendly, specialty detergents brand, launched a free standing boutique in Manhattan's SoHo neighborhood last fall. Resembling a laundry room, the pristine white shop offers a range of home cleaning products and candles.

The long awaited **Barneys NY** downtown flagship store opened its doors in the Chelsea neighborhood in March. Designed by Steven Harris Architects, the store highlights an exquisite, signature spiral staircase and uses luxurious and plush materials such as marble, granite, mirror polished stainless steel, brass, leather, mohair and velvet throughout the store. The lower level offers cosmetics, skincare and fragrances and features the Blind Barber, a men's barbershop, which also serves beer and cocktails. The iconic Freds at Barneys' Madison Avenue restaurant has opened a downtown location on the third floor. Using state of the art technology such as iBeacon technology and a custom clienteling app, sales associates use iPads to offer customers a personalized shopping experience.



Barneys New York Downtown Flagship Central Staircase (photo by Scott Frances)

Independently, Dubin noted that fine fragrances are seeping into movies and TV shows such as PBS's "Mr. Selfridge" and the film "Brooklyn." "Perfume counters are a focal point that gets a lot of screen time in depicting the upscale nature of Selfridges department store and the heroine of the film, 'Brooklyn,' logs

⁵ <http://ny.racked.com/2015/12/2/9834716/cire-trudon-nyc-store-candles-nolita>

time working in the perfume department of Bartocci's, surrounded by graceful glass flacons," noted Dubin.

To release the new **10 Crosby collection**, Derek Lam filmed 10 individual three to five minute digital vignettes. The 10 scents each come housed in different colored glass bottles and represent a scene on Crosby Street where Lam's flagship store is located. **2 AM Kiss, Blackout, Drunk on Youth and Looking Glass** are a few of the fragrance names each with an unconventional story and fragrance interpretation inspired by what Lam sees in his neighborhood.

Tech Savvy

The 21st century continues to be driven by technology, which plays an important role in consumers' fragrance knowledge, the composition of a fragrance and its delivery. As consumers get more tech savvy, brands and retailers are creating personalized experiences using technology. Mintel's research revealed that 45% of beauty consumers prefer to search for product information in-store on their mobile device and that 39% have used or would try doing research on a store-provided tablet.⁶

For consumers, Symrise has created a fine fragrance genealogy app with a masculine and feminine version that can be used on smartphones and tablets. Users can search scents, create a list of favorites and share links via email. Fragrances are indexed alphabetically, listed by launch year and fragrance family. To elicit an emotion and inspire perfumers and evaluators, Mane

created "Creativity by the Nose," an olfactive kit containing a series of fragrance compositions designed by Mane perfumers.

To better understand and experience synesthesia, Zachary Howard, an aerospace engineer and an artist-in-residence at Autodesk, created a device that would turn colors into smells.⁷ Howard engineered a finger sensor to detect the color of an object, an armband equipped with an Intel Edison chip to analyze colors and break them into red, green, and blue components and a mask with fans to release a scent. Creating a RGB signal, the chip coordinates a combination of scents and fills the mask with the scented interpretation of the object's color. A grapefruit scent was used for the color red, tea tree for green and lavender for blue.

Try Before You Buy

Fragrance is a personal choice and difficult to select without smelling in person, which is particularly challenging now with so many market choices available. Dubin says "The average consumer is overwhelmed and confused by the multitude of choice. A new fragrance launches, and within a year, before the public has had a chance to find and get to know the original, a flanker is released!" According to Scentbird chief executive officer, Mariya Nurislamova, "Sixty percent of women who wear perfume switch between multiple fragrances. In fact, the number one reason women buy perfume is to get something new or different."⁸

⁶ <http://www.drugstorenews.com/article/whats-next-personalized-beauty-shopping-experience>

⁷ <http://www.popsoci.com/this-mask-lets-you-smell-rainbow>

⁸ <http://www.instyle.com/news/fragrance-subscription-site-netflix-perfume>



5th Screen Digital, Inc. and Sephora partner to release *Inhalió*, a first-to-market immersive, technologically-advanced, sensory experience, which educates consumers and enables them to sample fragrances in a new way.

Consumers like to try before they buy and to address this issue, there have been a handful of fine fragrance subscription sampling-based programs, such as Olfactif and the discontinued Bergamot. Dubbed as the “Netflix of Perfume,” **Scentbird** is the newest web-based monthly fragrance subscription to offer purse-sized atomizer samples. With a humorous slogan “Date perfumes before marrying them,” subscribers fill out an online preference survey and Scentbird searches its database to match fragrance options with preferences.

Sephora is a beauty pioneer and continually enhances its consumers’ experiences through the use of sophisticated technology. At the end of October 2015, in conjunction with Worldline, **Sephora Flash** launched in France. Designed as a smaller store, Flash allows customers to shop the entire catalog and “do an online order in a physical way” through digital devices at the store. The products are delivered or picked up the following day. In November 2015, Sephora rolled out their **Teach Inspire Play** initiative in a test store in San Francisco.⁹ Featuring twelve individual stations, each is equipped with an iPad, USB ports, and WiFi, to enable customers’ access to Sephora’s current Skin IQ, Fragrance IQ, Color IQ technologies and digital beauty workshops. In the fall of 2015, **Pinrose**, a fragrance line based on multifaceted fragrance personalities, launched at Nordstroms. iPad-enabled displays help shoppers find their fragrance personality using a 10-question quiz with an algorithm influenced by neurologist and smell expert, Alan Hirsch.

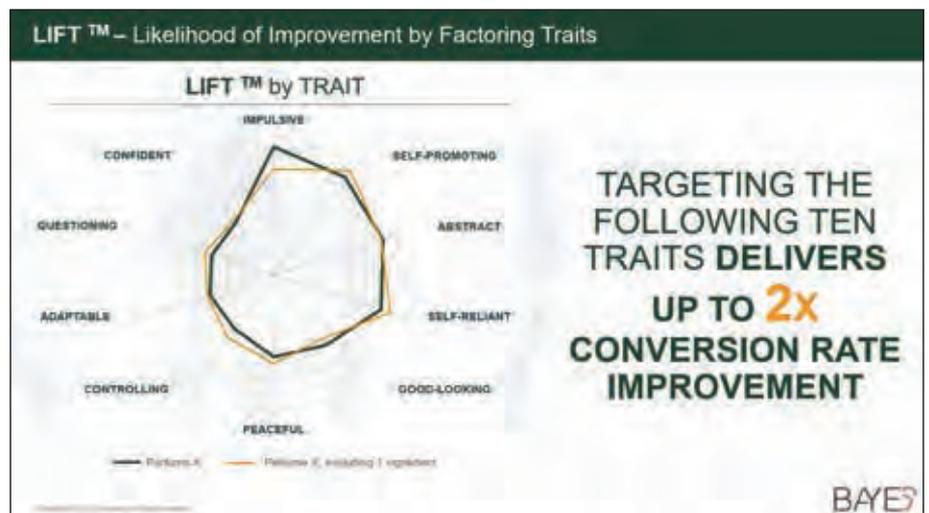
Schmidt said, “Technology is taking fragrance into the next century” and cites 5th Screen Digital, Inc.’s *Inhalió* technology and Bayesix as examples.¹⁰ *Inhalió* is self-described as “The Internet of Scent,” and is a software cloud-based platform that enables the experience of scent. Using a dry air ‘printer-like’

cartridge, the scent immersion technology can be connected to home products, entertainment, gaming, retail fragrances, auto and ambient scent marketing devices.

“*Inhalió*’s platform is uniquely designed to provide brands the ability to deliver a new and personalized scent experience while gaining valuable usage and trend information from each scent experience in store, or in the home,” noted *Inhalió* CEO Keith Kelsen. This technology is used to enhance Sephora’s *Fragrance IQ* system in the Teach Inspire Play San Francisco store.

Michelle Warvel, vice president of store digital, Sephora, said, “Our partnership with 5th Screen Digital to develop a first-to-market immersive, technologically-advanced, sensory experience has exceeded our expectations. The ability to provide our clients with a new approach to discovering fragrance families through an innovative delivery system can change the way our clients shop for and discover a new scent. And, it provides us with an engaging way to bring our Teach, Inspire and Play message to life within the fragrance world.” Schmidt is excited about this technology and adds “Finally there’s a technology that allows you to sample numerous perfumes by dispersing, not spraying fragrances from a touchscreen. No more spritzing, cross contamination and mess.”

Bayesix is a “personality-based market intelligence company that provides product predictive analytics and insights” and



Lift “Likelihood of Improvement by Factoring Traits” is the first personality-based fragrance algorithm, which Bayesix claims will optimize conversion rates.

created **Lift**, “the first personality-based fragrance algorithm.” *Lift* is meant to improve and increase consumer goods companies’ return on marketing investment by better understanding the consumer. According to the company, *Lift* “identifies the 10 personality traits with the highest likelihood to prefer your fragrance.” Schmidt believes these sophisticated new market research tools, which are able to analyze millions of data points, will significantly help increase the success rate of new launches.

Scented Air

Trendincite’s “Forward Thinking: In The Air” article, which appeared in the December 2014 issue of *Perfumer & Flavorist* magazine, explored air care activity and new technology that emits scent. Although not a fine fragrance, scented air remains an industry focal point.

⁹<http://www.bustle.com/articles/125206-sephora-launches-teaching-workshops-in-stores-so-you-can-learn-as-you-play-with-makeup>

¹⁰<http://inhalió.com/>

As a New York School of Visual Arts' assignment looking at space and sensory, student Angela Kim created a series of scratch and sniff signs placed in various underground New York City subway locations including Canal Street, Union Square and Herald Square in February.¹¹ Playing on MTA's "If you see something, say something" slogan, the flyers read "If you smell something, smell something else." The flyers had scratch and sniff tabs with different scented oils such as vanilla, lavender, orchid, magnolia and tuberose, which straphangers could pull off.

Procter & Gamble has upped its technology and launched **Febreze Home with Febreze Connect**. Using a Wi-Fi connected Febreze plug in scent dispenser and a smartphone app, for \$49 consumers can release one of two scents in their home. The device has motion sensors, a multi-colored LED light and a temperature and humidity sensor. **Aroma360** founder and author of "The Art of Aroma" book, Farah Abassi creates custom environmental scents in both commercial and residential spaces "that utilize cool air diffusion technology to maximize the therapeutic benefits of custom fragrances, [which] range from relaxing and calming to energetic and inspiring."

Fragrant Future

Store shelves are crowded and consumers are overwhelmed by choices, many of which have similar marketing stories, packaging and olfactive directions. To distinguish themselves in the competitive landscape and resonate with consumers, brands are designing genderless fragrances and attention grabbing packaging. Brands and retailers are launching flagship stores and creating interactive experiences to engage and educate consumers. Books that focus on the history and science of fragrance are hitting shelves while new sophisticated technology leads the way in fragrance sampling and environmental air care.

Watch as the jam-packed fine fragrance market continues to make room for new products. Manufacturers and fragrance suppliers will continue to search for the next olfactive blockbuster, innovative package design, in store experiences and breakthrough technology. Schmidt concludes "All-in-all, I see a very bright fine fragrance future with more segmentation, customization and targeted marketing approaches."

¹¹ <http://abc7ny.com/news/scratch-and-sniff-subway-posters-try-to-combat-stinky-stations/1193918/>

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