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"Generation Co" and the Future of Fragrance

Global youth trends in fine fragrance usage and preference reveal paradigm shifts and surprising opportunities

Symrise has released the results of a large-scale survey of global young adult (ages 16–22) trends, examining "the behaviors of people, their connection with their world, with their lives and, more in-depth, their connection with their beauty brands and products in terms of use and preferences." The two fold process involved examining social trends conducted in concert with research firm RISC (*www.risc-int.com*) and other partners, as well as determining fragrance preferences in fine fragrance, shampoo, shower gel and deodorant via 900 door-to-door interviews with young adults in Barcelona, Berlin, London, Paris, Moscow, Chicago, Los Angeles, Miami and New York.

The findings paint a complex and nuanced picture of what it will take to win this influential and distinct demographic. This so-called "Generation Co" "thinks in terms of *collaboration*, *co*-creation and above all *co*nnection," all of which is reflected in brand and product choices. "Brands define 'who I am," says Doreen Bucher, Symrise's senior director of fine fragrance marketing, scent and care division, North America.

So, who are they? The age bracket set by Symrise's survey represents about 20% of the global population, including 73 million in the European Union and 45 million in the United States. In Asia, the total is a staggering 755 million, 234 million of which reside in India—a country that hasn't yet developed a significant fine fragrance market. One can imagine the potential for companies capturing even a sliver of these emerging consumers.

This generation, says Bucher, lives in an immediate world of infinite multitasking, which she characterizes as, "I want it all right here, right now.' There's no such thing as deferred gratification for this group ... because they can get [anything] whenever they want. It's a really interesting way to understand the world."

In this world, young adults self-report that they spend six hours a day in front of a computer, either PC or mobile, two and a half hours online, and about one hour a day on a social network (Bucher suspects this estimate is lower than actual). This immersion in socially oriented technology reflects a more general craving for new sensorial and communal experiences typified by, for example, Rock Band-type games and energy drinks. In addition,



this young adult bracket is increasingly involved in significant family purchases such as technology, appliances and even cars. And it turns out when it comes to fragrance, gender and geography distinctly shape preferences.

Global Young Adult Fragrance Preferences

From January through April of last year, Symrise surveyed participants regarding preferred fragrances. Each was asked to choose up to eight preferred scents and one favorite. Notable in the US results was the insight that department stores are witnessing declines as a source for scents as the surveyed young adults tend to purchase scents in locations where they shop, including clothing and specialty stores. For example, the top scent among males in the US data was Abercrombie & Fitch's *Fierce*, and several fragrances in the Women's top 30 used fragrances came from Victoria's Secret and Bath and Body Works.

By the Numbers: Generation *Co* (16–22 Years Old)

According to survey numbers collected by Symrise:

- 36% influenced by global brands
- 37% like to shop: big names at low prices
- 49% of 18–24-year-olds live with parents (particularly strong in southern Europe)
- 50% of EU young adults use mobile phones for things other than calls (apps, e-mailing, listening to music, etc.)
- 62% feel their way of consumption can change the world
- 64% very satisfied or satisfied w/physical appearance
- 69% of females buy at least one fragrance
- 70% definitely wouldn't or probably wouldn't consider having plastic surgery
- 72% believe weight worries are normal
- 96% have joined social media

US males: US males favored several Axe products, in addition to scents from top brands such as Adidas. (Because Axe is considered more of a deodorant product in Europe, it did not appear on the EU list.) Other leaders include fashion brands found in mass-market locations, including *Acqua Di Gio*, *ckOne*, *Burberry Touch*, *Eternity*, *Polo Sport* and *Fahrenheit*. Some influence from celebrity brands include Sean John and David Beckham.

EU males: While top male young adult scents in the European Union include brands like Adidas, they are generally markedly different from the preferences of their US counterparts. Top EU young adult male scents include: *Hugo Boss, Le Male, Armani Code, Black XS* and *Lacoste.*

The leading scents in common among US and EU males featured what Bucher characterizes as classic masculinity: *Armani Code*, *Acqua Di Gio*, *Hugo*, *Eternity*, *D*&*G The One* and *Light Blue*.

Male olfactive preferences: Symrise mapped the top 20 fragrances in both the United States and European Union to compare family preferences. As it turns out, both groups favor fougère, in particular fougère-fruity and fougère-ambery. Bucher notes that both groups of young adult males showed a preference for "extreme sensuality," typified by woody-oriental fragrances such as *Armani Code* in the United States and woody-fruity scents such as *Black XS* in Europe. US males also favor the freshness associated with citrus scents characterized in fragrances such as *Acqua Di Gio, Cologne 41* and *ckOne*.

Contrasting US/EU female preferences: US preferences encompass specialty and celebrity brands such as Britney Spears, Paris Hilton, Baby Phat and Jennifer Lopez. Fruity and floral-fruity families are key to this market. This is not so among EU young adult females, who prefer floriental-fruity scents—fruity with sensuality, as Bucher puts it. "When these kids grow up, are they going to reject fruity notes because it reminds them of being young?" she asks. "To grow up with this consumer, maybe it's a need to develop a fruity that's not sticky, not too sweet, that's more sophisticated."

EU young adults most preferred scents such as Amor Amor, Coco Mademoiselle and Flower by Kenzo. Among the few preferred scents shared by US and EU young adult females were Light Blue, ckOne and Angel.

The Symrise team identified a number of emotional facets related to preferred scents in both the United States and Europe, including tenderness, represented by fruity-floral and floral-woody scents. US young adults showed a preference for floral green scents like *Pink* or white florals like *Juicy Couture*. Meanwhile, EU young adults preferred edible and spicy scents. Sensuality, on the other hand, was typified by the floriental family and, in the EU, with woody facets. The company has also identified a "tasty addiction" preference in the United States, highlighted by fruity and edible scents.

Top admired brands among young adults in 23 surveyed countries: Nike, Adidas, Nokia, Sony, Coke, Apple, Samsung, Puma and Levi's. 27

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Fragrance Demos: A Tale of Six "Tribes"

Based on its research, Symrise identified six so-called tribes, non-rigid communities based on shared music, icons, lifestyle, fashion and beauty brands. The tribes are broken into: emo (dark, moody, sensitive), arty (feminine, modern, hippie), geeks (smart, modern, quirky), neo-mods (male, rock, hipster), fluo (short for fluorescent; bright, happy, fun) and funky/RNB (evolution of hip hop, cross-cultural). In considering what kind of fragrances might characterize these groups, the company's perfumers formulated 12 demos, many featuring inspiration from the beverage world.

Emo: These scents highlight the concept of soft and rough contrasts through the use of musk. The feminine scent includes a powdered sugar accord with lemon curd for zest/sourness, plus vanilla, musk and sandalwood. The masculine scent is built around an accord inspired by ginger ale and hazelnut wood, with a musky background.

Arty: These scents, both feminine and skewing a bit older within the young adult range, focus on naturalness and floralcy. The first scent, an edible, features cheese-cake and wild strawberry accords. The second scent intermixes impressions of patchouli and milk.

Geeks: Symrise's scents for this tribe focus on vitality and energy with fougères and citrus notes that in part evoke the static of a computer screen. The masculine fragrance features absinthe and gin accords, including notes of juniperberry and licorice. The feminine scent presents a more sugary, but subtle, kick of licorice and a strawberry leaf accord that adds a clean feel with a little fruit.

Neo-mods: Here, the perfumers employed classic florals and fougères twisted with a "rock-and-roll touch" to be more modern. The feminine scent features orangeflower with a mango impression for a little zest, tropicality and modernity. The masculine scent is a classic fougère with coriander and tonka for modernity.

Fluo: This category is characterized by fun, energy, effervescence, excitement and sexiness, Bucher says, highlighted by "fizzy fun fruits." The feminine scent features a Red Bull accord—a sticky-sweet amalgam of strawberry, orange and green banana—plus some white floralcy for femininity. The masculine scent features sharp lime and rich vetiver for contrast. The overall impression is toniclike, with a touch of ginger. Bucher declares this one "very bouncy."

Hip-hop/RNB: This category, too, focuses on energy, excitement, sexiness and sensuality, evoked through addictive woods, spices and edible notes. The feminine scent includes Bellini and tiramisu accords, producing an alcohol-soaked richness backed up by creamy sandalwood and accords imparting champagne, peach and chocolate notes. Finally, the masculine scent was constructed around a Bailey's Irish Cream accord. The scent also includes cedar, vetiver, sandalwood and musk for a slightly dry impression.

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