

## Mr. Porter

Everett H. Johnson attended Dartmouth College and received his BS degree in science from Iowa State University. He was associated with Wilson & Company Sporting Goods and entered the fragrance industry in 1956 when he joined

Polak's Frutal Works in a sales capacity. In 1961 he joined Fritzsche-Dodge & Olcott Inc., and in 1967 was assigned to the position of vice president of fragrance sales. He joined the Givaudan Corporation in 1973 in his present capacity as vice president and general manager of the fragrance division.

# Bloom, Groom or Doom—Market Research Study of the Men's Fragrance Market

Everett Johnson, Givaudan, Inc.

The year is 1977; the place, New York City.

The American perfumers, creators of fragrances, are gathered for their 23rd annual summit conference. There is an apparent problem with the direction of the men's fragrance market. 1977 should be different from 1967 and 1957—and, hopefully, from 1987. But will it be? Will it be business as usual this year, or will someone plant seeds of doubt, question the usual, suggest the non or un-usual? Will someone seek out the new trends as well as dusting off the old patterns? Will someone, perhaps, see where we have been? Where we are? And, where we are going?

Assume it's the mid-1950s, and the men's fragrance marketing band is playing "We've Only Just Begun."

There was a tendency to spend money on grooming products for hair and hair removal such as shaving cream, razor blades, grooms, tonics, and aftershaves. A sign of market explosion in this era was the development of gift sets—a talc, cologne, and aftershave—all under one pretty roof.

"The industry is being rewarded with a bright expectation of large volume ahead." *Beauty Fashion* May 1955.

It's the 1960s. The same band is playing the same song with more experienced marketing choreography.

"We like the idea of the new product put out by the Old Spice Line, called Outdoor Lotion. . . . It opens a new specialized market among men such as surveyors, construction engineers, builders, farmers." *Beauty Fashion* Nov. 1961.

"An expanding market for direct purchase of fragrance by men is everywhere evident. It is no more a sign of masculinity to disdain the personal use of fragrance. . . . The men's toiletries

market is bound to be among the largest growth areas in the industry." *Beauty Fashion* Nov. 1964.

"Observers of the market feel that the entire men's field is shaking down to a serious, sustained and steady kind of growth pattern. There is increasing effort to capture the mature audience as well as to educate the younger men to use toiletries. . . . The widening variety of men's products and the growth of drug store sales both reflect the same trend—a tendency for men to buy more of their grooming aids for themselves, no longer always waiting for their wives and the gift route." *Beauty Fashion* Apr. 1969.

It's the 1970s, and here we go again.

"Men will no longer face the world without cologne. . . ." *Beauty Fashion* Apr. 1971.

"The men's market is very good. It is really interesting how it has taken off by leaps and bounds." *Beauty Fashion* Aug. 1976.

It's 1977 and would you believe we're *still* looking forward to a prosperous and profitable fragrance future? Does "good press" necessarily mean that that's the way it will be? Doesn't anyone ever say they doubt future booms? Is it bad press to give bad press to the future before it's had a chance to happen? While it's still today? Is it putting, as the sayings go, the chicken before the egg, the cart before the horse? Is it something everyone will keep talking about without actually probing the problem, without actually *doing* anything about it? Have we "come a long way, baby," or is it really just "The Way We Were"?

As a matter of fact, how *were* we? How real is this repeatedly intermittent men's fragrance "boom"? How many more marketing bandwagons will there be to hop upon?

Let's take a look at some trends and hope they

won't become patterns. For the purposes of this discussion, the men's fragrance market was born about two decades ago, which, incidentally, coincides with the first American Society of Perfumers Annual Symposium. We're all familiar enough by now with the ancient Egyptian fragrance story not to want to hear it again. The same goes for the first half of this century which sired the oldies-but-goodies. However, there seems to be a significant activity peak in the mid-to-late 50s for men's fragrances, so we'll start there.

By the fifties, "classics" like Old Spice, Aqua Velva, Mennen Skin Bracer, 4711, and English Leather were an established part of the scent scene. Canoe for men was introduced in this country; Acqua di Selva, Arden for Men, Tabac Original, Woodhue, Monsieur Givenchy, and Yardley Aftershave were also introduced. Caswell-Massey had their colognes; Guerlain, their green-labeled Eau de Cologne Extra Dry for Men and their white-labeled Imperiale "favored by men and women for 100 years; Marcel Rochas was suggesting mutual gift-giving "Once she gave him Moustache he had to give her Femme;" Seaforth with their Heather Masculine Aroma and famous shaving mug; Jet for Gentlemen with a "J", who love luxury; Eau de Vetiver by Carven "based from an extract of rare vetiver root" for those who understood what vetiver was; and, incidentally, Givaudan (with an optimistic quote to match the best of them) were there. We saw a vital growing market, ready for smart promotion of good fragranc-ing. "Fresh, original scents that rouse masculine interest and respect, and stimulate men's natural pride in better grooming."

Colognes, aftershaves, lotions, eaus: the market was picking up all right. Atomizers, soaps, talc, sprays: they made the perfect gifts. They came in "ensembles" and collections; some included hair dressings and shampoo. English Leather, way back then, hinted at the modern concept of the "fragrance wardrobe."

Although not too much was said about the fragrance itself, or what the fifties man was supposed to do with it, the packages were touted. Packages, probably because eye-appeal, rather than nose-appeal, were what drew gift-buying shoppers. There were redwood boxes and pinched, round, oval, and square bottles which could be found in "fine men's shops throughout the country," were "sold world-wide at fine shops," and, of course, could be bought at the neighborhood drug store.

There was interest. Men were interested in trying fragrance; women wanted them to. It made gift-giving easier. Fragrance sets were an interesting something-different, and something different might even have meant a new fragrance.

Before everyone knew it, the sixties had arrived.

Success not only breeds success but also me-tooers. Fragrance genealogy charts and trees really take off from here with types and twists in new products and line extensions. Old Spice added lime to their line. Canoe, stressing their bottle and label, turned labels into ads. Tabac informed Americans how sought after their bottle of men's cologne was in Europe—of course because of the fragrance which was "subtle, vaguely smoky, and certainly not at all sweet or self-conscious." English Leather went directly for the women who, as main fragrance

purchasers, bought gift sets for their men.

There was a group of fragrances, perhaps riding on their reputations with the women, that I'll call the hers-for-him in name only: Chanel Pour Monsieur, Gres Pour Homme, Golliwogg for Men, even Arden for Men. If she liked hers, maybe she would like his on him. Maybe he would even like his, particularly if he liked hers on her. Sometimes they were pitched together—like Canoe and Ambush, Femme and Moustache, Aphrodisia, and Woodhue. Sometimes they were served up on a tray of gold, like the Baron. Sometimes they were compacted into traveling kits (the Traveling Baron) that, incidentally, made finely wrapped and packaged gifts.

More than anything, perhaps, the sixties were a time for outrageous fragrance marketing. Anything went, because no one was really sure what would and what wouldn't. It was pretty clear that men were not buying their own fragrances and that they may actually have wanted their own fragrances.

Monsieur Rochas got right down to the brass tacks of getting the hers out of his fragrances. "Sugar and spice and everything nice are killing what you're made of. . . . It won't make you come up smelling like a rose, a forest, or a basket of fruit. Because that's no way for a man to smell." This cologne was "created simply to let a man smell like a man." Si Senor from

Spain is "all man, good manners." Chenango came on lively; Snuff de Schiaparelli was for rugged males. Teak by Shulton had "what Scandinavian men have" to get them to carry on the way they do; Kanøh—something new—had "the look of health"; Royal Oak Scented Lotion suggested that, once given by a woman to her man, "it may replace conversation entirely." Black Watch, the man's fragrance by Prince Matchabelli, was so masculine that it was "fathered." Remember Moonshine by Hi-Score Toiletries? "Make hay while there's . . ." Succés by night, Succés by day by Coty. What "Every Man Wants. . ." Old Spice came up with a different twist of manliness. "Burley won't make a man out of you—but it will make the man in you smell better." Kent of London: "It can't talk. But women get the message." It may be getting to seem that way, but the fragrance industry really has nothing against conversation. Hai Karate: the classic watch-out-women! cologne. Pub "uncorks the lusty life." Nine flags for nine countries, or six, or four, or three, or two, or one.

The bandwagon kept growing and growing. More and more types of marketers hopped aboard. Remember Cricket by Kayser-Roth? And Colgate-Palmolive's 007? It gave "any man the license to kill . . . women. . . . Its masculine aroma makes women behave outrageously." If that doesn't work, you could always "Shiver her timbers" with Seven Seas. If she's out to borrow your cologne again, try St. John's for Men, Bay Rum or Lime, the "one cologne she won't borrow." She might love it though. "Mrs. Kirk Douglas loves That Man by Revlon." Moustache: a plain statement. The Wild Woods Sparkling Foam Aftershaves with matching colognes had an interesting approach: a bit on how to use it: put it in your hand, let it melt, put it on. "Shower, shave and Figaro . . . Splash on Figaro. And take on the world."

Not too much was said about fragrance in the majority of these ads. A lot of the products smelled masculine, manly, smoky, subtle, different, long-lasting, woody, spicy, fresh, tangy, zesty. More was said about the packaging, the effect on women, and their gift-ability.

Nuts and Bolts: was it such "a screwy idea"? Jade East: that "exhilarating elegance." Sometimes hardly anything was said. Onyx by Lenthéric; Classic Cologne Aerospray; Russian Leather; Hawaiian Surf; Yardley Black Label; from the House of 4711, a choice for gentlemen; York Town 1781; Persian Lime; Royal Briar for "chaps;" and

Mr. Ghe, for men. There had been hints at grooming and would continue to be: Braggi's Man Plan; Arden for Men to use every day; and, of course, Aramis.

By no means assume that this limited selection of ads completes the men's fragrance introductions of the sixties. Not at all. There were also Green Water by Jacques Fath; Speidel's British Sterling; GTO by Max Factor; Zizanie; Messieurs Balmain, De Rauch, Lanvin; Jaguar by Yardley; Passport 360; Eau Savage; Bill Blass; Mister L; King's Men; and so many more that your brains are probably reeling with names I've omitted.

The name was an important part of the game, and the game was an important part of the name, the package, the promotion, and the fragrance.

By the seventies, the struggle to get men's fragrances onto the shelves was over. There was more "talk" of smell in the fragrance ads, as well as the clout of a sexy or sensual lifestyle. There was more sophistication all around—the graphics, the marketing pledges and promises, the profiles of the fragrances. There was still talk of grooming in the usual sense, or treatment, but not much around about grooming the consumer to use fragrance. Old Spice travelled easily for a fragrance fix at any time. The smell? "Mysterious musk; fresh, green herbal; and the great classic fragrance of regular Old Spice."

Musk was coming on the scene, and so was the concept of a *classic* men's fragrance. But, what does he do with the fragrance besides carry it conveniently? How and when does he use it? Where does he apply it? He *could* try holding it up to his ear (Wind Drift) to hear the sea, or smell it. English Leather added Timberline, for those who don't want "to smell like the city," and Musk Cologne for Men. Where there's a marketing gap in your line, what could be better than to fill it with a missing link? Acqua di Selva was its "clean and fresh as a rain forest" self in its recognizable bottle; same for Tabac Original, the fragrance made to linger, not disappear. Lingering around the sauna, Kanōn celebrates the healthy looking male body with co-

logne; Jade East joins the gifts for the travelling man parade with six packs in two fragrances and three colors; Jovan, with consistent informative packaging for men's fragrances, bottled Musk Oil, Ginseng, Grass Oil, and Monsieur Jovan. The Jovan International Collection maintains packaging appeal while giving the man basic instructions: "Splash them on your face, neck or chest (or wherever). . . ." Paco. Cardin's Men's Cologne mixes some fashion and style with the fragrance promise. Yves Saint Laurent, in a less graphically impactful ad, attempts an editorial on style: he explains the wardrobe-as-a-unit-including-fragrance concept. Givenchy Gentleman, an image with a vested interest; Chanel for Men, "the mark of a man." And where would men's grooming be without Aramis, now "a complete collection of seventy grooming aids, from shampoos to bath soaks, from shaving needs to deodorants, all designed to create a feeling of well-being."

More landmarks of the seventies are Macho—packaging, name and a new approach—bad appeal, or how g-o-o-d is b-a-a-a-d; Ho Hang; and Havana Weed Oil.

The last paragraph of the Havana Weed Oil ad copy says "available for men and women at better cosmetic departments." This raises numerous questions. For example, how many men do you see in cosmetic departments, better or otherwise? How many cosmetic counters do you see in men's departments or men's areas? Word psychology seems to be involved here, which results in men's fragrance counters being called bars and centers. And new language is being sought to describe moisturizers and skin colorers and treatment products in general for men. The ads of the fifties show that men want their own thing. While they may not realize that their favorite fragrance may be based on a twist of a women's classic, they do realize the "stigma" of femininity or femaleness placed on the concept of "perfume" for men. What it all boiled down to, particularly in the past, is that most men didn't buy their own fragrance. They received it as a gift or asked their female friends to pick some

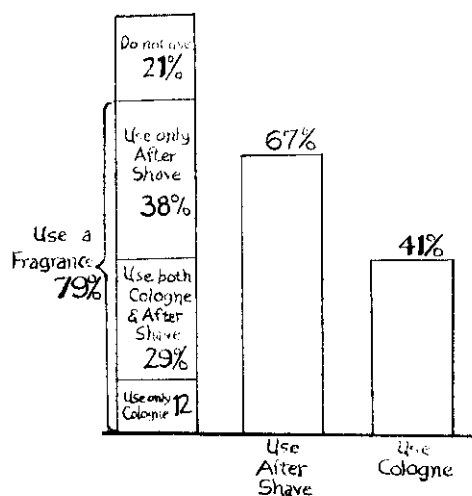
up. So, in addition to the predicted boom in men's fragrance sales that reoccurs every decade, there is a boom in men overcoming their "shyness" and trying more and more different smells on and by themselves. Knowledgeable sources say that more and more men are brash and bold enough to actually go and purchase their own colognes.

Is this just more good press? Putting the cart before the horse again? Are they afraid that if they say men are still shy about counters and testers and smelling "perfumy," sales will drop by prediction?

We found answers to a lot of the questions asked here by asking a lot of questions. We conducted a survey by mail among members of Givaudan's national research panel. The sample consisted of males 18 years and older. The responses were matched by computer with their demographic data, then tabulated. We wanted to know who uses cologne and aftershave, who buys it, etc. We compared our 1976 study with earlier studies we did for aftershaves and colognes.

Getting down to basics, how many men use a fragrance? Percentage-wise, 79% of the men in the study used fragrance, about  $\frac{2}{3}$  of them reported using an aftershave, and about two out of five used cologne.

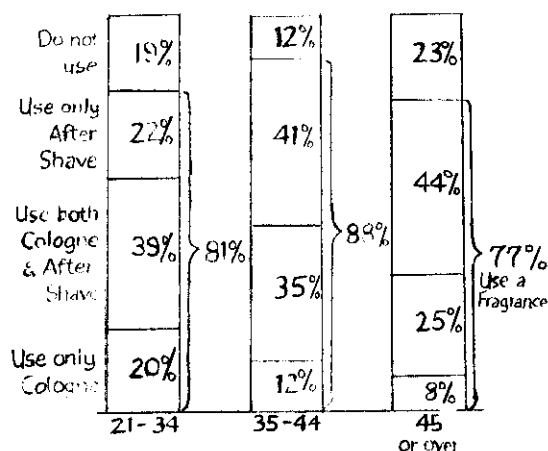
How many men wear a fragrance?



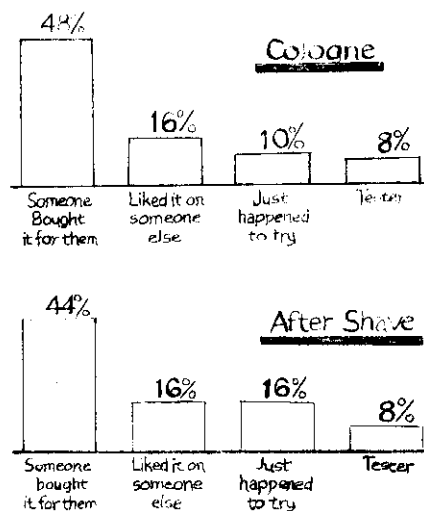
By age, use of fragrance by men gets somewhat interesting. Although men 35-44 years use the most fragrance, they don't use the most or least of either aftershave or cologne. For example, the use of aftershave is relatively low (22%) among men 21-34 years and relatively high (44%) among men 45 years and over. For cologne, the trend seems to go the other way: of men 45 and over, only 8% use only cologne while of men 21-34 20% do. If this trend continues, cologne-only usage should increase in the 35-44 year olds, then the 45 and over, as older groups are replaced by present younger cologne users. But will it? Is this a dynamic trend or a moment caught in time? Will a man

switch to aftershave as he gets older and his life-style and philosophy change, even though he used cologne when he was younger? Or will he take his present fragrance preference with him through the decades?

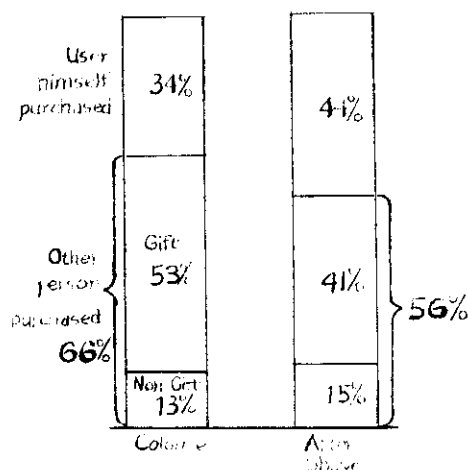
How many men (by age) wear a fragrance?



How did he happen to try his favorite?



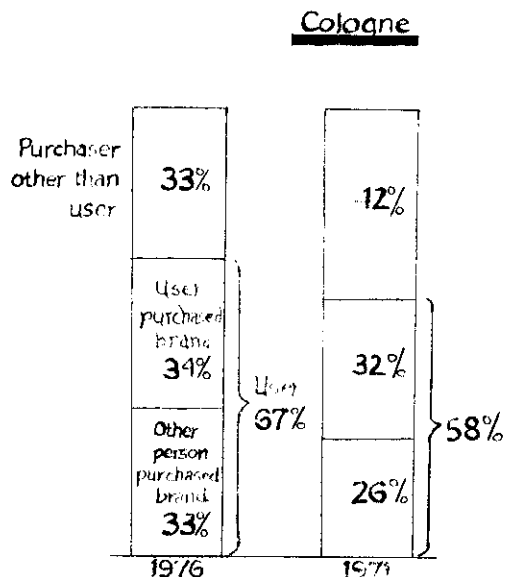
How did he acquire his favorite?



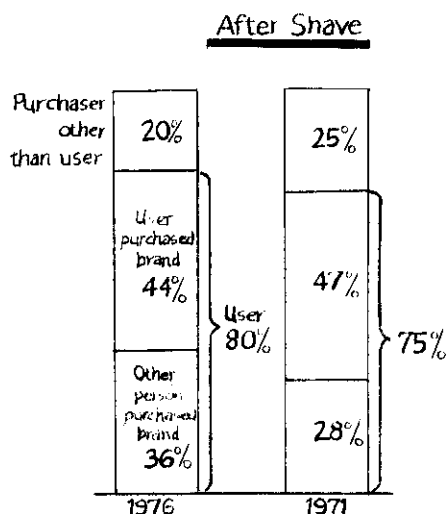
How did men first happen to try their favorite brand? How did they acquire their favorite brand? In approximately half of the cases, for both cologne and aftershave, it was bought by someone else.

Who selected his brand of cologne the last time? Two-thirds (67%) did, an increase from 1971 when 58% selected their own. 80% of aftershave users selected their brand the last time as compared to 75% in 1971. This means, basically, that men are more likely to select their own aftershave, perhaps even buy it, than cologne. You have to wonder why.

Who selected his brand of cologne last time?



Who selected his brand of aftershave last time?



Are most men really that aware of the difference, not only in composition but in the way the products are used? Or could it be something as simple as the name? When do you use an aftershave? After shaving. When do you use a cologne? And isn't that the same stuff women use? Would you believe that 44% of the men we questioned use aftershave as cologne? And that

38% use cologne as aftershave? Can you imagine how the market would expand if people knew how to use the products properly?

Manufacturers of women's products are trying to use the men's market as an area for expansion. One reason for lack of acceptance by men of products made for them is that the manufacturers and their media services are using feminine terminology and concepts in their marketing approaches. It is logical to use the same language. Men want to take better care of their hair and skin, they want to look better, feel better, smell better, just as women do. The apparent stigma can be overcome by changing the language while changing the attitude, by making men feel (from the ads they read to the location where they purchase) that they are indeed unique, not just an extension of women when it comes to cosmetics and toiletries.

Perhaps just as large a problem is grooming men to use these fragrance products once they have accepted them. How? By educating them in ads, in editorial space, in any way and every way we can. It is surprising how the *lack* of ads and editorial reinforcement in the magazines of these decades has grown. This means not only that men are not being told how to use the products, they are not even being told to buy them in the first place. As evidence of this, I surveyed April 1977 issues of men's, women's, and general interest magazines for men's fragrance advertising. The men's magazines do not have many, if any, fragrance ads, seemingly because this type of ad (sissy) is out of place among ads for cars, stereos, boats (macho). The women's and general interest magazines were not much more encouraging.

So, we ask, where are the men's fragrance ads? How can a man sit privately and learn what to do with fragrance? Where is the groom support for the bloom of men's products?

Let me digress here to a group of fragrances introduced in the past 20 years or so which I personally feel are unique fragrance types. By unique I mean fragrances that started trends, that show originality in concept, that had impact, that left a mark. My choices are all still part

of the fragrance marketing scene and do not include the classics that have been the foundation and mainstay of our industry for years prior to the fifties. Hats off to those who created and marketed these fragrances.

**Arden Sandalwood for Men**—Introduced in the mid-fifties, is basically a woody chypre fragrance with good identity and lasting properties. This product line was one of the leaders in introducing men to treatment conditioner products.

**Canoe**—Introduced domestically as a men's fragrance in 1959, is basically the same fragrance concept as Ambush, Dana's women's fragrance. Is classified as fougere with ambery characteristics.

**Aramis**—Introduced in 1962, based on Cabochard, Gres' women's fragrance. A chypre, woody, oriental, leather, with tremendous impact and lasting properties, it was presented as a total conditioning fragrance concept for men using, of course, a high concentration of fragrance in all products.

**Kanōn**—Introduced in 1967, a unique fragrance with long lasting properties, this fragrance is based primarily on women's fragrance notes: moss, chypre with woody, coniferous notes. A Swedish-themed total grooming line with treatment products, conditioners are an integral part of the line.

**Eau Savage**—Introduced in the U.S. market in 1967, this distinctive, but not overwhelming, fragrance with an eau fraiche approach provided the fresh, citrusy, sage lavender characteristics and woody dry-out so popular with both men and women.

**Pierre Cardin**—Introduced in 1971, a unique and lasting fougere, spicy, woody, semi-oriental powdery type. Although Cardin is a French de-

signer, the introduction and success of his fragrance in the U.S. led the way for other designers to enter the fragrance market in the early seventies.

**Jovan Musk Oil**—Introduced in 1973, reproduced the characteristic smell of musk in a fashionable way. Although perhaps not the first musk oil product to come down the pike, Jovan was certainly a leader that set the trend for musk oil fragrances which we still enjoy.

**Paco Rabanne**—Brought to the U.S. in 1974, this product has shown tremendous worldwide acceptance as a unique fragrance concept and more masculine in type, herbaceous, tobacco, agrestic.

**Jovan Grass Oil for Men**—Introduced in 1974, capitalized on successful green notes found in women's fragrances with floral, balsamic, and animal undertones (An original concept, even today).

**Grey Flannel**—Introduced by the American designer Geoffrey Beene in 1975, this distinctive fragrance used orris top notes with florality and woody undertones represents a new dimension for men's fragrances based on fragrance type designed initially for women.

If the questions raised here are to be answered, we will have to answer them. Who is "we"? We means every segment of the fragrance industry: the creative perfumers, marketing personnel from the supply and finished goods houses, the trade and consumer press, and advertising personnel. We must nurture the audience we already have and change the attitude of the audience we do not have.

Will we accept the challenge to create new fragrance attitudes in the laboratory and in the consumer media? Will history (his-story) repeat itself? Will it be bloom and groom or doom?



## Mr. Porter

Ms. Hayden is a graduate of the University of Illinois where she received her Bachelor Of Science and Pharmacist degrees. She studied perfumery at the Roure Bertrand Dupont school

in Grasse and has applied the knowledge gained in the positions she has held with Marcelle Cosmetics and Starkman Associates. In fact, fragrance has been a major portion of her life for the past seven years since joining Jovan as fragrance director.

# Genesis According to the Book of Jovan

Nancy Hayden, Jovan, Inc.

Many of you will wonder how a book of the Old Testament could find its name adopted by a gutsy upstart fragrance company from the Midwest.

In the vernacular, and I mean no disrespect to the Old Testament, Jovan has instituted its own genesis with the birth of each of its fragrances. It is this birth and evolutionary process which I hope to tell you a little about.

"In the beginning . . ." (1968), our company was better known by Mink and Pearls than by Jovan. The novel 9 mm encapsulated white pearl, filled with mink oil in a bath oil formula was a novel concept. It had a luxurious feel, a marvelous fragrance, was elegant to look at, and was exquisitely packaged. The pearls dissolved to soften the skin and impart a rich perfume to it. This tiny pearl was the tool to launch the name of Jovan.

Historically, Bernie Mitchell, the multi-talented entrepreneur, decided that he wanted to enter the perfume business. Despite the scoffing and the discouraging advice he received from his colleagues and knowledgeable friends in the industry, he forged ahead with his indomitable spirit. His objective was clear—to establish a perfume company in the Midwest. Mink and Pearls was merely the unique product to put the name of Jovan on the map. Mink and Pearls became a perfume and cologne as well as a full bath line.

Why did Bernie Mitchell want to make Jovan a fragrance house instead of a cosmetic or gift house? His perfect sense of timing told him the fragrance field was just at its birth. In the 1960s it was still in its infancy. Besides, fragrance was fun, it had versatility, and it was just initiating its entrance as an integral part of the fashion world.

But still, the ever present question arose, "How could a small Midwest firm make it in the fragrance world?" Maybe our Midwest location removed us far enough away from the myopia and the introspective world of the industry to give us a fresh approach to fragrance. Maybe our simplicity and straight-forward marketing technique gave us a better insight into the needs of the American consumer. That insight was that women would not wait for husbands or boy-friends to buy them a gift of perfume. Today over  $\frac{1}{3}$  of the total working force in the U.S. is comprised of women. They have disposable incomes with which to indulge themselves. What was once a luxury is now considered a necessity; quality fragrances at reasonable prices have become a commodity. And this is the basis of our growing business.

Determination and a strong motivating force never let superficial details clutter our objective—building Jovan into a fragrance house.

The Classic Floral fragrance line was conceived as our first fragrance line. It conveyed this simplicity and directness in four singular basic floral types: lily, lilac, modern flowers and oriental flowers. The line conveyed a message of delicate femininity. The packaging was elegant, sleek, and uncluttered. We debuted with seven basic bath products in each of four fragrances. 1972 was our target date, but a little bottle of musk oil interfered with our launch date. The Classic Florals never had a chance to truly get off the ground when we marketed them in 1973. There were too many products in the line, the packaging parts were too complex, and our energies were concentrated on musk. As a result, we later consolidated the line into only four cologne sprays. This was a case of killing a line