

Soap, Detergent and Household Product Fragrance Trends

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One never knows when a trend becomes more than a tendency to imitate. Innovators create while followers surge along in a declining "trend."

In recent years certain tendencies have been consistent in the U.S. household products market. While we hesitate to call any action in the market a trend, there are certain consistent traits in the U.S. marketplace. First and most obvious is the over all high quality of perfume in almost every market segment. We believe three major product factors contribute to this quality improvement:

- perfumer specialization—in the last ten years the role of the household products perfumer has been recognized as the equal to cologne or general perfumers.
- chemistry—a host of new, inexpensive, stable materials began to broaden the perfumer's creative potential. Most often these materials simply led to product refinements enhancing more traditional odor types.
- base quality—consumer product companies have improved their bases significantly in recent years allowing the perfume to function without so much of its cost and character being spent on masking.

The second "trendancy" deals with the market, marketer and the consumer. For years the marketer added fragrance because you had to mask the base, or because the "leader" did, or because it was an easy way for a product manager to make an observable product improvement. The consumer seemed to accept the latest without significant complaint.

Today every major marketer sees fragrance as a significant part of over all product function. Fragrance is no longer an additive but an integral part of the product itself.

This new-found awareness led to a higher investment in product aesthetics. At first the increased spending took the same old perfumes to new concentration levels. With time marketers began asking for higher quality (cost) oils for their product. Now we live with a fragrance-aware consumer who expects both quality and concentration.

Cost does not always directly correlate with quality. However, in these product areas increases in allowable expense have exponential effects. Starting from the old standards of \$2-\$5 per pound, simple increases of as little as \$1 per pound gave the creative team significant increased latitude in material selection. This expansion of the degree of freedom presented new avenues for creative expression.

A word about this investment in product

aesthetics: Perfumers create fragrances that perform. Olfactory stimuli signal the consumer that the product works; it cleans, it softens, it sanitizes, it freshens; it's safe, it's strong, it's long-lasting, it's identifiable. The signals generated with perfume performance continue to grow in importance with consumer and marketer alike. But after all the glow about growth and opportunity we see little innovation in the fragrances produced. Why so few really new "trends?"

Despite the creative genius, the clean base, the liberalized cost, we still suffer subjective selection. Consumer research into fragrance functionality remains limited and less sophisticated than product performance evaluation. Consumer testing remains expensive and time consuming. Marketing management, with a few notable exceptions, fails to learn about this important product component, relying on their own tastes to direct the creative process.

One of the most limiting factors, antiquated competitive selection processes, continues to pit supplier against supplier with winner take all. This type of development program by its very nature forces competitors to limit their creative input. Suppliers try to satisfy the personal tastes of the key person on the client side. Submissions then become panel pleasers fitting the fattest part of the statistical sample.

Bar Soap

Refreshment bars typify the trend to high concentration and increasing cost. It is not unusual

today to find a bar introduced at 1.5-1.7% perfume with a cost of \$10 per pound. Fragrances tend to be green, lavendaceous, or minty in character. Most people attribute this concentration trend to the innovative introduction of Irish Spring from Colgate.

Skin care bars generally try to add a moisturizing agent which complicates the creative problem. These agents enhance base odor and cause additional stability or masking demands on the perfume. Fragrances tend to be attempts to imitate either classical colognes or fashionable skin care products. They are described in general as flowery, often aldehydic, musky or sweet and woody.

General purpose bars reflect the quality of the manufacturer's producing plant in their odor, the free acid levels, and color stability. The best of these soaps represents an exciting vehicle for the perfumer to demonstrate creative talents. Fragrances tend to be old fashioned as in long term standards like Ivory or Cashmere Bouquet.

Detergents

Light duty liquids are often referred to as dishwashing liquids, when in fact they have important secondary roles in fine fabric care. This market sub-segment can be further divided into efficiency products, like Joy, or skin care products, like Dove.

The efficiency brands might better be called the "lemonades" of today. Joy's long standing lemon position has come under assault from Ajax

and a new entry Sunlight. While each brand strives for its own lemon identity they all come off as similar and certainly less than innovative. Clean, fresh innovative ideas like grapefruit, mandarin, the greens of parsley and apple seem more than the marketer can risk.

Attempts by classics like Ivory to bridge the skin care efficiency segments have not been productive. Certainly they never signaled the consumer of their intent with any meaningful perfume change.

Heavy duty detergents might be segmented in a variety of ways: high suds powder, low suds powder, or liquids. Artificial definitions like these become even less meaningful when one considers the fragrances involved. New ideas, for instance Fresh Start from Colgate, are marked by the historical idea of fresh and clean, citrus or muguet or lavender.

Could it be that marketers realize a fickle consumer today? Consumers buy or try on price, but performance brings a continuous use. Though we may abhor the staid appearance of detergent fragrance today, true innovation has gone on. All the investment has been in the performance of the perfume in the wash, on the line and, most importantly, residual odor on cloth after drying. This creative task has taken many years to develop and required investment in research by both supplier and marketer alike.

Fragrance directions today still appear to be the lavender, citrus, adlehydic florals of the early sixties and seventies. However, the strength and performance today reach the consumer as never before. Concentrations have escalated slightly to levels of .25% and more. Most importantly, manufacturers found new money to invest in the fragrance element with new perfumes being introduced at prices in excess of \$6 per pound.

Where we do see innovation it tends to be evolution not revolution. Green and fruity notes modify floral aldehydes; citrus sophisticated with new floral chemicals impart a richness and diffusion rather than a new fragrance character.

Household Products

Specialty home care products abound in the U.S. They clean ceramics, glass, woodwork, floors; they bleach, disinfect, deodorize, wax and polish. In general, this class of products uses fragrance as a masking agent to cover strong base notes. Bleaches in scourers or other products can be quite unpleasant unless the ever-stable pine notes make it palatable. Certain cleaners rely on solvent systems to achieve their performance. Fragrance again tries to mask the unpleasant base odor and impart some slight freshness to the im-

mediate area. Mr. Clean continues to market this concept of freshening the area. Claims made would have you believe the product has a hard surface residual odor leaving a sense of clean to go with the traditional shine. That particular citrus scent and a few others do seem to last longer in use. So, like the detergents, the creative innovations are masked by traditional pines or citrus while the perfume goes to work to convince the consumer of product efficacy.

While we did not dissect each household subsegment for its own peculiarities, one can observe the same general trend in this segment as in the others: higher concentrations, more expensive perfumes, and greater perfume performance.

Fabric Softeners

Again the products take on different physical types. Liquids began the softener use in earnest back in the early 1960s. Perfumers met the challenge of covering foul base notes by large doses of floral notes. With time the fragrance problem became less complex as bases and materials improved. As the base improved so did the fragrance quality. Then the quality was not enough and the buzz word became substantivity.

The latest product innovation, the dryer sheet, took the market by storm in the 1970s. Early attempts to make this type of softener failed because the materials and the consumer were not ready. Dryer sheets take a great amount of fragrance to convince the American consumer of their effectiveness. The fragrance might be described broadly as musky woody florals.

Perfumers have considerable latitude in cost and concentration in working on these sheets. Stability in the high temperature of the dryer and the demand to impart a residual odor identity necessitate the latitude. Even with this much leeway, perfumers find that they can't please everyone so they had to produce an "unscented" sheet.

Conclusion

The innovations and trends in the U.S. market must be described as functional creativity. Perfumery specialists, technically trained, have made a once dormant area of consumer product come to life. The real trend is that *perfumes perform*. Next maybe the marketer will allow the perfumer to express a truly creative perfume, test it objectively, and pay for the effort.

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