

SPATE

JULY 2023

# FRAGRANCE TRENDS REPORT



# SCENTING A SHIFT

Fragrance is a trend enjoyed both passively and actively. Perhaps a whiff of a stranger's mysterious cologne strikes you as you walk behind them on the street — a passive example. The alternative — active enjoyment — is how we examine today's fragrance category, exploring consumers' fragrance searches as they hunger to engage with the category.

In the last few years, burgeoning fragrance interest has spread through different consumer populations. High-end brands with high price points are growing in popularity alongside nostalgic and decadent yet affordable fragrances. Consumers are also looking for ways to layer and experiment affordably, as shown by increasing interest in sampling services.

Spate's latest annual Fragrance Trends Report explores the top formats, notes, and brands piquing consumer interest. Coupled with insights from industry insider, Digital Strategist & Fragrant Expert Olya Bar, this report is the ultimate guide to personal fragrance trends for the months ahead (holiday planning included).

Have questions? Request your [free trial](#) for more complexion data, and to get your questions answered.

Thank you,

Olivier and Yarden, co-founders of Spate

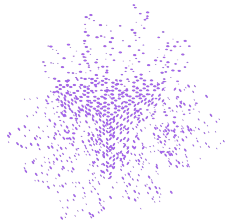


# THE METRICS: DATA TRANSLATION

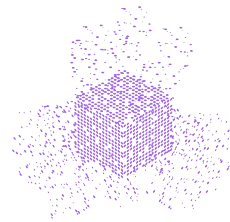
- *Volume:*  
Monthly search volume averaged over the last 12 months
- *Increase:*  
The difference in the average search volume of the past 12 months and the average of the previous 12 months
- *YoY:*  
Year-over-Year growth rate comparing the latest 12 months vs. previous 12 months growth rate
- *Predicted YoY:*  
Year-over-year growth rate: predicted 12 months vs. actual 12 months growth rate

# METHODOLOGY

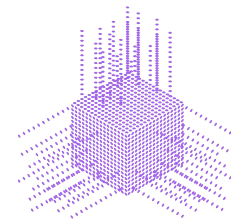
At Spate, we analyze over 20 billion search signals to identify which beauty products are most top of mind for consumers. **Why search data?** Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on *real* consumer behaviors and needs.



+20B beauty related  
search signals in the US



Unsupervised machine  
learning to identify clusters



Trends classification for  
insights and implications



# A WORD FROM THE EXPERTS

Spatte collaborates with Olya Bar to uncover the latest fragrance trends, delving into popular notes, brands, consumer preferences, and the dynamic landscape of the fragrance industry.

While brands of all sizes and price points are reflected throughout the report, Olya notes the emergence of more niche, artisanal houses within popular conversation.

*Consumers are increasingly gravitating towards niche and artisanal fragrances, driven by the desire for unique scents, high-quality craftsmanship, and exclusivity. While designer and luxury perfumes continue to dominate by volume, there is a notable trend towards these distinctive offerings.*

*The appeal lies in consumers' appreciation for creativity and the quest for different scent combinations. Artisanal perfumes are gaining popularity as they cater to these preferences.*

Olya Bar  
Digital Strategist & Fragrant Expert | @olyabar

# TOP PERSONAL FRAGRANCE TRENDS

## TOP TRENDS BY INCREASE IN SEARCH VOLUME

Trend	Volume	Increase↓	YOY
vabbing	457.5K	+423.8K	+1259.3%
pheromone perfume	48.3K	+24.7K	+104.5%
body spray	91.4K	+8.2K	+9.8%
mini perfume	23.0K	+6.7K	+41.0%
perfume oil	76.9K	+4.8K	+6.6%
arabian perfume	12.6K	+4.7K	+58.9%
vanilla perfume	41.8K	+4.0K	+10.6%
musk perfume	34.9K	+3.3K	+10.3%
pheromone oil	14.7K	+2.8K	+23.4%
hair perfume	20.4K	+2.2K	+12.0%

## TOP TRENDS BY YEAR-ON-YEAR GROWTH

Trend	Volume	Increase	YOY↓
vabbing	457.5K	+423.8K	+1259.3%
pistachio perfume	2.3K	+1.3K	+128.5%
pheromone perfume	48.3K	+24.7K	+104.5%
arabian perfume	12.6K	+4.7K	+58.9%
summer fragrance	3.1K	+1.0K	+48.3%
mini perfume	23.0K	+6.7K	+41.0%
honey perfume	2.6K	+589	+30.0%
orange perfume	4.4K	+905	+25.6%
travel perfume	9.0K	+1.8K	+25.3%
pheromone oil	14.7K	+2.8K	+23.4%



# UNLEASHING SAVORY SENSATIONS

Savory aromas are taking the fragrance world by storm, heralding a new olfactory family that is gaining widespread popularity.

Departing from the realm of sweet flavors and scents, fragrances inspired by nuts — including pistachio perfume — offer captivating and unique options for fragrance enthusiasts.

*Gourmand fragrances don't necessarily have to be sweet. Rather, they refer to edible scents. Lately, there's been a trend of savory scents emerging.*

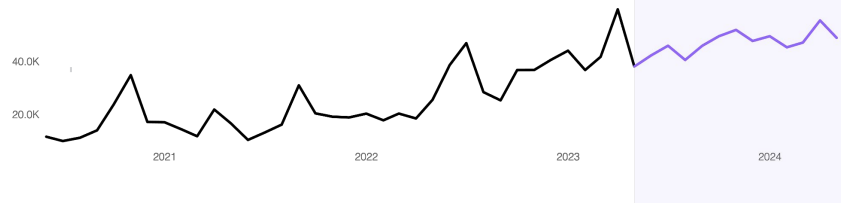
*Across the category, particularly after the trade show in Milan, savory fragrances like pistachio are gaining momentum. Nuts, such as walnuts and hazelnuts, contribute to the savory umami vibe. It's fascinating to witness this exploration.*

Olya Bar  
Digital Strategist & Fragrant Expert | @olyabar

# PEROMONE PERFUME

As seen on the Spate dashboard

+104.5%<sup>Ⓞ</sup>  
YEAR-OVER-YEAR GROWTH



## HOW BIG IS THIS TREND

High Volume  
48.3K average monthly searches

## HOW COMPETITIVE IS THE SPACE?

Low Competition  
790 average brand searches

## WHO OWNS THE MARKET SHARE?

Several Market Leaders

## WILL IT LAST?

Likely

## STATS:

+115.7%

YEAR-OVER-YEAR  
GROWTH

## RELATED SEARCHES:

Questions	Volume↕	Brands	Volume↕
best	2.6K	marilyn miglin	360
does work	1.6K	pure instinct	110
where to buy	190	mugler	30

## SPATE POV

Searches for pheromone perfume continue to grow as consumers remain curious about the efficacy of these products. Questions searched alongside pheromone perfume such as *best*, *does [pheromone perfume] work*, and *where to buy* indicate curiosity on the consumer end. Most search queries are consumer driven, indicating an opportunity for brands to own the trend. Brands like *Marilyn Miglin*, *Pure Instinct*, and *Mugler* are currently leading the market. The volume of searches for these brands are low, whereas the trend is high volume, highlighting the massive opportunity for a fragrance to come in and help enhance consumers pheromones.



# SUMMER FRAGRANCE

As seen on the Spate dashboard

**+48.3%** <sup>Ⓢ</sup>  
YEAR-OVER-YEAR GROWTH

2.0K  
1.5K  
1.0K  
500.0

2021

2022

2023

**+16.0%** <sup>Ⓢ</sup>  
12 MONTHS PREDICTED GROWTH

2024

## HOW BIG IS THIS TREND

Low Volume

3.1K average monthly searches

## HOW COMPETITIVE IS THE SPACE?

No Competition

0 average brand searches

## WHO OWNS THE MARKET SHARE?

No Market Leaders

## WILL IT LAST?

Likely

## STATS:

**+48.3%**

YEAR-OVER-YEAR  
GROWTH

## TOP SEARCH QUERIES:

*best summer fragrances men*  
*best summer fragrances for men*  
*summer fragrance men reddit*

*best summer fragrances*  
*best summer fragrances male reddit*  
*best mens summer niche fragrance*

## SPATE POV

The low volume trend, summer fragrance, reveals a shift in consumers desire for a fragrance for the summer, outside of standard fragrance seasonality. With no competition and no market leaders, this trend offers a great opportunity for fragrance brands to market their products as specific to the summer season. Top search queries such as *best summer fragrances men* indicates that consumers are looking for summer fragrances suitable to men. The search for *summer fragrance men reddit* also highlights that this trend came from the Reddit platform. Brands should keep an eye on Reddit as it has an apparent impact on consumers' fragrance preferences.

# HAIR PERFUME

As seen on the Spate dashboard

**+12.0%**<sup>Ⓢ</sup>  
YEAR-OVER-YEAR GROWTH

15.0K  
10.0K

2021

2022

2023

2024

**+9.1%**<sup>Ⓢ</sup>  
12 MONTHS PREDICTED GROWTH

## HOW BIG IS THIS TREND

High Volume  
20.4K average monthly searches

## HOW COMPETITIVE IS THE SPACE?

High Competition  
8.6K average brand searches

## WHO OWNS THE MARKET SHARE?

Few Market Leaders

## WILL IT LAST?

Likely

## STATS:

**+12.0%**

YEAR-OVER-YEAR  
GROWTH

## RELATED SEARCHES:

Product Format	Volume↕	Brands	Volume↕
mist	1.9K	gisou	3.0K
spray	490	pink sugar	880
oil	310	byredo	600

## SPATE POV

The high volume hair perfume trend is an exciting signal that consumers are increasingly looking for ways to add fragrance to their hair routine. Whether it be in the format of *mist*, *spray* or *oil* consumers are interested in products that will help give their hair a nice aroma. Searches for *oil* alongside hair perfume indicate a great opportunity for hair care brands to create multifunctional products that do more than just smell good. Top volume brands such as *Gisou*, *Pink Sugar*, and *Byredo* indicate that there is opportunity for hair care brands to make a play into the fragrance industry with this trend.

# TOP PERSONAL FRAGRANCE NOTES & SCENTS

## TOP NOTES BY INCREASE IN SEARCH VOLUME

Trend	Volume	Increase ↓	YOY
pheromone	122.4K	<b>+52.7K</b>	+75.7%
vanilla	110.1K	<b>+11.3K</b>	+11.4%
fresh	50.2K	<b>+4.6K</b>	+10.1%
strawberry	14.9K	<b>+3.8K</b>	+34.1%
floral	34.1K	<b>+3.6K</b>	+11.7%
bourbon	6.2K	<b>+2.8K</b>	+85.2%
champagne	9.1K	<b>+2.5K</b>	+38.0%
amber	36.7K	<b>+2.3K</b>	+6.8%
sea salt	9.4K	<b>+1.9K</b>	+25.7%
sage	9.1K	<b>+1.9K</b>	+25.7%

## TOP NOTES BY YEAR-ON-YEAR GROWTH

Trend	Volume	Increase	YOY↓
pistachio	2.3K	+1.3K	<b>+128.5%</b>
bourbon	6.2K	+2.8K	<b>+85.2%</b>
pheromone	122.4K	+52.7K	<b>+75.7%</b>
gooseberry	590	+172	<b>+41.2%</b>
blueberry	1.9K	+526	<b>+38.3%</b>
champagne	9.1K	+2.5K	<b>+38.0%</b>
strawberry	14.9K	+3.8K	<b>+34.1%</b>
sage	9.1K	+1.9K	<b>+25.7%</b>
sea salt	9410	+1.9K	<b>+25.7%</b>
ambergris	3650	+652	<b>+21.7%</b>



# FRAGRANCE NOTES 101: ALLURE & VERSATILITY

Notes are undoubtedly the essential part of fragrances. With the rise of pheromone perfume, it reveals consumers' interest in attraction and allure.

Ambergris, though exorbitantly costly, highlights the significance of substitution. Ambroxan, for example, serves as a less expensive alternative to ambergris while also possessing remarkable versatility.

*The allure of pheromone notes in perfumes is undeniable. These captivating chemical signals are associated with sensuality and seduction, despite the lack of scientific evidence.*

*Ambroxan, a fascinating note found in many fragrances, offers remarkable versatility, evoking both fresh, clean vibes and sensual, carnal characters. Its adaptability in blending, fragrance structure, and dosage allows for diverse forms and expressions.*

Olya Bar  
Digital Strategist & Fragrant Expert | @olyabar



WHAT LIES AHEAD

# NOTES OF THE FUTURE

Spatie reviewed fragrance notes that have had positive upward growth over the recent years and are predicted to continue their upward growth in the coming 12 months.

Explore to understand what consumers will want to smell like for at least the next year.

<b>Trend</b>	<b>Volume</b>	<b>Predicted YOY↓</b>
mango	3.3K	<b>+31.9%</b>
strawberry	14.9K	<b>+31.8%</b>
vanilla	2.1K	<b>+31.6%</b>
pear	8.4K	<b>+26.6%</b>
coffee	5.0K	<b>+25.3%</b>
gardenia	33.5K	<b>+24.3%</b>
gourmand	4.2K	<b>+23.6%</b>
bourbon	6.2K	<b>+22.0%</b>
amber oil	5.7K	<b>+21.9%</b>
palo santo	1.1K	<b>+20.4%</b>



FUTURE NOTE SPOTLIGHT

# STRAWBERRY

14.9K AVG MONTHLY SEARCHES, +31.8% PREDICTED YOY GROWTH

Top search queries for strawberry alongside personal fragrance are a mix of consumer and brand driven. Searches also indicate a preference for sweet, gourmand strawberry combinations.

Consumers demonstrate interest in various formats from perfumes to body sprays to oils. Brands should keep an eye on strawberry as well as the other fruity scents — like mango and pear — into 2024.

## TOP SEARCH QUERIES:

- Strawberry perfume*
- Strawberry pound cake perfume*
- Strawberry shortcake perfume*
- Strawberry body spray*
- Strawberry vanilla perfume*
- Body shop strawberry perfume oil*
- Marc jacobs strawberry perfume*
- Body shop strawberry body spray*
- Bourbon strawberry and vanilla body spray*

# TOP PERSONAL FRAGRANCE BRANDS

## TOP BRANDS BY INCREASE IN SEARCH VOLUME

Trend	Volume	Increase ↓	YOY
versace beauty	581.8K	+60.6K	+11.6%
scentbird	178.1K	+60.4K	+51.3%
valentino beauty	240.5K	+50.4K	+26.5%
glossier	140.6K	+39.1K	+38.5%
burberry beauty	351.4K	+33.3K	+10.5%
carolina herrera	370.9K	+32.2K	+9.5%
sol de janeiro	64.1K	+29.8K	+86.9%
jean paul gaultier	80.3K	+19.4K	+31.7%
parfums de marly	96.7K	+18.9K	+24.2%
jimmy choo	130.7K	+15.6K	+13.5%

## TOP BRANDS BY YEAR-ON-YEAR GROWTH

Trend	Volume	Increase	YOY↓
charli d'amelio [born dreamer]	4.2K	+3.1K	+280.7%
gisou	3.0K	+1.8K	+147.5%
tiziana terenzi	1.0K	+534	+114.5%
nishane	2.2K	+1.0K	+88.5%
sol de janeiro	64.1K	+29.8K	+86.9%
henry rose	12.4K	+5.7K	+85.2%
shawn mendes	5.0K	+2.1K	+70.6%
wakeheart	3.7K	+1.5K	+67.3%
patti labelle	9.7K	+3.8K	+64.7%
ex nihilo	2.9K	+1.1K	+60.2%





# LAYERING FRAGRANCE ON A BUDGET

Scent layering empowers consumers to personalize and express their individuality through the exploration of various fragrance combinations.

Looking at the top brands, Scentbird is a driver of positive search volume change across the category. Olya Bar hypothesizes this is due to an increased desire to experiment — and layer — on a budget.

*Scent layering is rising in fragrances, enabling personalization by combining multiple scents. It reflects a shift towards exploration and customization, moving away from a single signature scent.*

*Smaller sizes, sampling, and services like Scentbird provide affordable options for fragrance exploration, catering to the demand for personalized and budget-friendly options.*

Olya Bar  
*Fragrance Expert & Writer*



# CONSUMER EXPERIENCE & AESTHETICS

Affordability is a key consideration for price-sensitive consumers, but the allure of luxury fragrances lies in the exquisite packaging and bottles, offering a distinct experience.

These opulent designs enable consumers to proudly display their fragrances on their vanities, adding a touch of elegance to their surroundings.

*Experience is key, with brands like Tiziana Terenzi prioritizing it. Their Sea Stars collection boasts gold-plated bottles adorned with beautiful sea stars, accompanied by a high price point. Buyers covet these luxurious aesthetics and captivating scents.*

*Owning and displaying these bottles on vanity tables completes the desired experience. In the social media era, aesthetics hold significant importance when choosing fragrances.*

Olya Bar  
*Fragrance Expert & Writer*



# SPATE POV

Dive into these critical insights to understand how to grow your brand and attract new customers in an increasingly competitive fragrance market.

**Consider expanding format offerings.** Growing interest in perfumes, sprays, oils, and hair perfumes reveal how consumers are looking to step up their scent game. Brands should offer popular scents in various formats at multiple stages of the consumer's routine. Whether multifunctional scented hair oils or mini and travel perfumes perfect for layering, different formats act as crucial varying touch points to enhance brand awareness.

**Consider the importance of season and location.** Searches for summer fragrance or Arabian perfume highlight the consumer's desire to use scents to transcend time or place. Whether exploring seasonality or offering inspiration from other cultures worldwide, brands can enhance this journey through scents that heed these desires.

**The future is fruity.** Top scents predicted to grow the most next year — like mango, strawberry, and pear — reveal that consumers want to keep things fresh and fruity in 2024. Brands should watch these scents as they continue to make their way into the mainstream. Consider ways to highlight these notes alongside current favorites — i.e., vanilla perfume or fresh scents — for a smooth transition.

# SPATE: MACHINE INTELLIGENCE FOR THE BEAUTY INDUSTRY.

## What's The Next Big Trend?

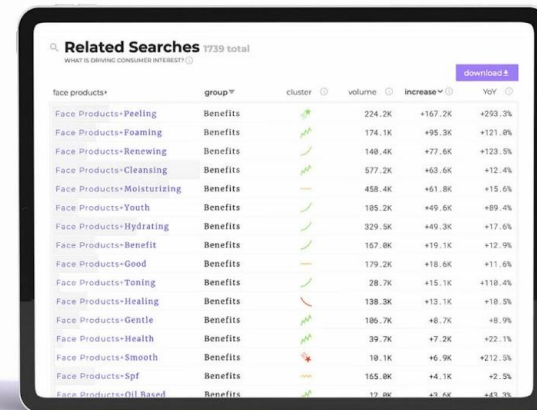
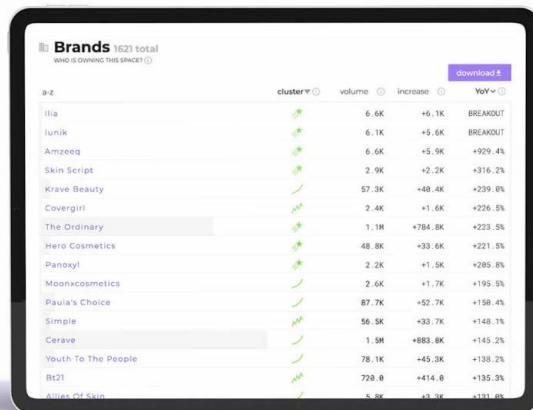
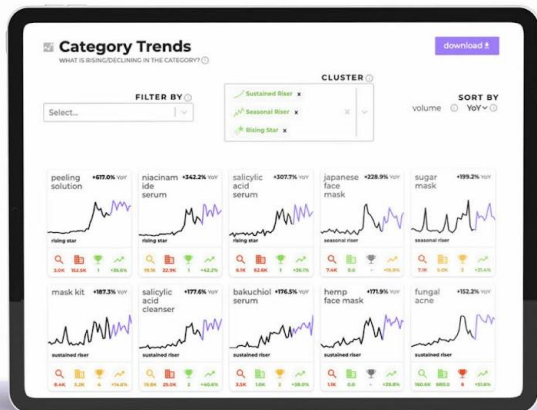
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

## Which brands are owning the space?

Measure level of competition within a space. Compare consumer interest across brands, including DTC.

## How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.



# HEALTH STATS EXPLAINED



## HOW BIG IS THIS TREND

This metric assesses the size of a trend using monthly Search Volume relative to its category.

**"Very High Volume"** trends are well established trends among consumers.

**"High Volume"** trends are those with high consumer awareness.

**"Medium Volume"** trends are fairly well known by consumers.

**"Low Volume"** trends have low consumer awareness.

**"Very Low Volume"** trends represent emerging niche opportunities.



## HOW COMPETITIVE IS THE SPACE?

This metric assesses how much of organic search are brands-related. It represents the top of mind brands that consumers search alongside a trend.

**"Very Low / No Competition"** indicates there are little to no brand searches alongside a trend.

**"Low Competition"** indicates that there are a few brand searches alongside a trend.

**"Medium Competition"** indicates that there are some brand searches alongside a trend.

**"High Competition"** indicates that there are several brand searches alongside a trend.

**"Very High Competition"** indicates there are many brand searches.



## WHO OWNS THE MARKET SHARE?

This metric assesses the presence or lack thereof of a market leader.

**"Very Few Market Leaders"** indicates a market in which very few brands own >80% of the share.

**"Few Market Leaders"** indicates a market in which a few brands are in high competition.

**"Several Market Leaders"** indicates a market in which there are several brands in competition.

**"Many Market Leaders"** indicates a market for which there are many brands in competition but no clear winners.

**"No Market Leaders"** indicates a market for which there is either fierce competition or an emerging market with no distinct players.



## WILL IT LAST?

This metric assesses the likelihood that a trend will continue to grow within the next 12 months.

**"Very Likely"** indicates a >90% confidence that a trend is predicted to grow.

**"Likely"** indicates with strong confidence that a trend is predicted to grow.

**"Uncertain"** indicates an equal likelihood that a trend is predicted to grow or decline.

**"Unlikely"** indicates with strong confidence that a trend is predicted to decline.

**"Very Unlikely"** indicates a >90% confidence that a trend is predicted to decline.

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