

SCIENTIA NATURAE GROUP PROJECT

Assignment 1



University of Padova

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1. Introduction

Cecilia's Home, a brand under Scientia Naturae, is actively involved in the home fragrances industry, specifically focusing on scented candles as their primary product. This report provides a comprehensive analysis of the home fragrances market, with a particular focus on scented candles.

In Italy, where Cecilia's Home operates, there has been a remarkable interest in home fragrances over the last five years. The market has been experiencing growth, and customer interest persists throughout the year. Furthermore, it is characterised by seasonality, with December being the peak research period on Google. This trend is even more accentuated within the scented candles segment.

When comparing Italy to the influential European markets of Germany, France, and the UK, a benchmark analysis suggests an increased interest in each country while similar seasonality patterns are observed in both the home fragrances market and the candles segment.

Further analysis of Scientia Naturae's online properties shows the inadequacy of the current status (e.g. site structure, content type, backlinks structure). While home fragrance products present a cohesive list of keywords and related search queries (e.g. "best scented candles", "luxurious scented candles"), Scientia Naturae/Cecilia's Home is not currently structured to leverage such characteristics. A dive into the SEO toolkits highlights the lack of traffic due to poor optimization. The inadequacies found are underlined through a benchmark analysis. In fact, the main competitors found through the analysis, both keyword-wise and product-wise, present a better positioning, with overall higher SEO figures. Finally, throughout the analysis, the comparisons drawn allow to suggest areas of improvement to the client.

2. Home fragrances market – Market overview

As previously introduced, the home fragrances market is divided into different product categories: sprays, diffusers, scented candles and other types.

The following figure draws a cohesive image of the influence each product category has within the market.

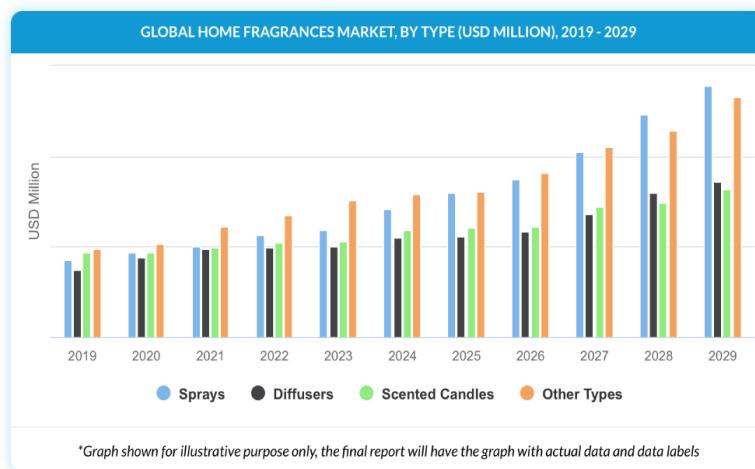


Figure 1. Source: Reanin (2023).

Even if a key role in this market is played by sprays, which are the main product chosen to ameliorate the atmosphere of living spaces, also the other types are all well diffused in the market. Sprays play a key role in the market, closely followed by an agglomerate of other product types. Scented candles and diffusers distinguish themselves as stand-alone products with a considerable market presence.

The impact of scented candles remains remarkable, and is projected to grow, together with the industry as a whole, in the next few years.

For the home fragrance market analysis, the period of time considered starts from 2019, until 2029, so it considers a 10-year timeline.

In 2019 the market experienced both a positive and a negative effect due to the pandemic of Covid-19. During lockdowns consumers spent more time indoors leading to increased demand for home fragrances. However, supply chain disruptions and economic uncertainties affected the market and consumers turned to online shopping to satisfy their needs.

In 2022 the global home fragrances market was valued at USD 25 billion.

2. Home fragrances market – Market overview

Its size is expected to increase to USD 33 billion by 2029, therefore growing at a Compounded Annual Growth Rate (CAGR) of 3.5%.

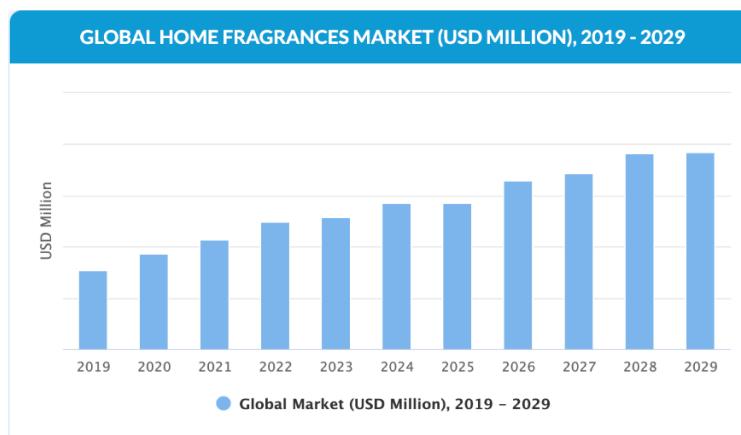


Figure 2. Source: Reanin (2023).

As shown in figure 2, the global market of home fragrances has been steadily growing since 2019, and it is projected to sustain the positive trend.

This growth is driven by a variety of factors summarised in the following:

- The increasing interest in the home decor industry, due to the willingness of consumers to create a personalised and inviting living space.
- The increasing demand for premium and natural home fragrances, since consumers are becoming more conscious about the ingredients used and their impact on personal health and the environment.
- The diffusion of e-commerce platforms has played an important role in the growth of this market; online channels offer a convenient and extensive range of products, making it easier for consumers to explore and purchase home fragrances.
- The growth of the middle-class population and rising disposable incomes in emerging economies have contributed to the expansion of the home fragrance market. As consumers have more spending power, they are willing to invest in products that enhance their living spaces.
- The growing emphasis of self-care and well-being, since consumers are looking for products that promote a sense of calmness and tranquillity within their homes.
- The importance of social media platforms and influencers in shaping consumer preferences and trends. The promotion of home fragrances has increased customers' awareness and generated interest in trying new products.

2. Home fragrances market – Market overview

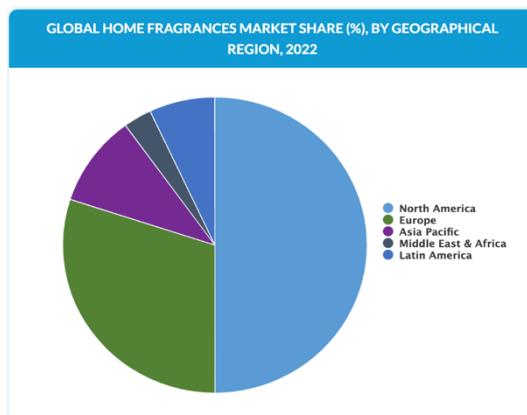


Figure 3. Source: Reanin (2023).

Considering the different geographical markets, North America and Europe clearly lead the pack due to the higher disposable incomes and the strong awareness of home fragrance products, as presented in the image above.

Focusing a little bit deeper on the European market, the CAGR is projected to grow up to 7.8% for the period 2022-2029.

The country leading this growth is Germany, followed by France and the United Kingdom.

For this purpose, those are the countries that have been chosen for the benchmark analysis that will be presented in the following sections (Google Trends, Ahrefs and Ubersuggest), in which they will be compared to Italy, the home country for Cecilia's Home.

Going into details, the German market dominated the European arena during 2022, and is projected to continue to be the dominant market until 2029, thereby achieving a market value of \$1.5 billion by 2029.

As previously mentioned, the German market is followed by the French one, which is predicted to experience a 8.6% CAGR during the 2023-2030 period.

Lastly, occupying the third place in the standings, the UK market is exhibiting a 6.9% CAGR along the same time span.

2.1 Conceptual map

The home fragrance market is highly competitive with lots of players offering a wide range of products. The companies competing in the market mainly focus on product innovation, branding and marketing, fragrance variety, pricing and the choice of distribution networks in order to differentiate themselves from the other firms and capture a bigger market share. Strategic partnerships, mergers and acquisitions are common strategies employed by firms to gain a competitive advantage in this field. The main players in the home fragrances market are:

1. Yankee Candle Company
2. Bath & Body Works
3. The Procter & Gamble Company

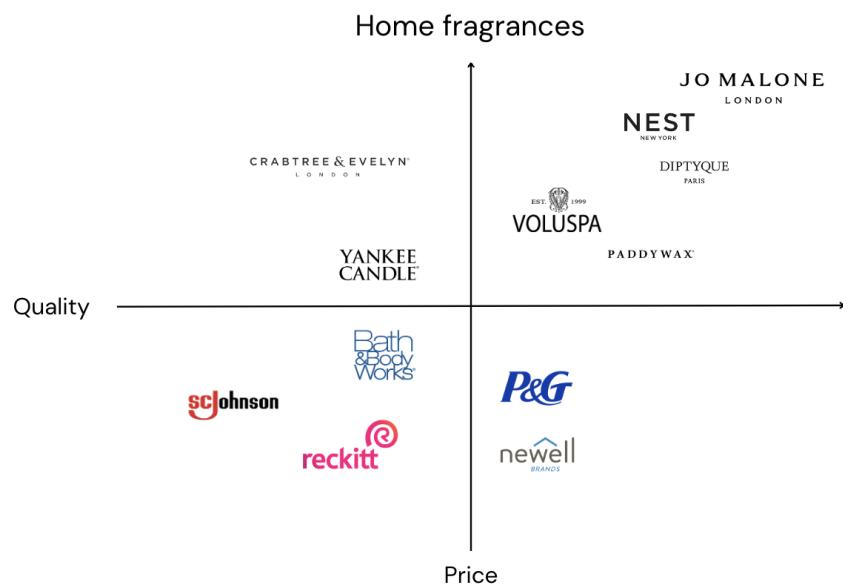


Figure 4.

These brands' product offering is positioned such that the price is the main distinguishing factor, along with a recognisable brand. Conversely there are other brands like Diptyque Paris, NEST fragrances, and Jo Malone London, whose products belong to the high-hand sector, that are located in the high quality and high price section. There are also some well known companies that can be easily found in supermarkets like P&G that are not only focused on home fragrances, but they have a wide range of products linked to selfcare, for example P&G owns Febreze and Ambi-Pur, Reckitt owns AirWick and SC Johnson owns Glade.

2.2 SWOT analysis

In order to get a better understanding about the strengths and weaknesses presented by competitors in this industry, to find out the main opportunities that they can exploit and the common threats that they may have to face, a SWOT analysis was conducted, and the results are shown below.

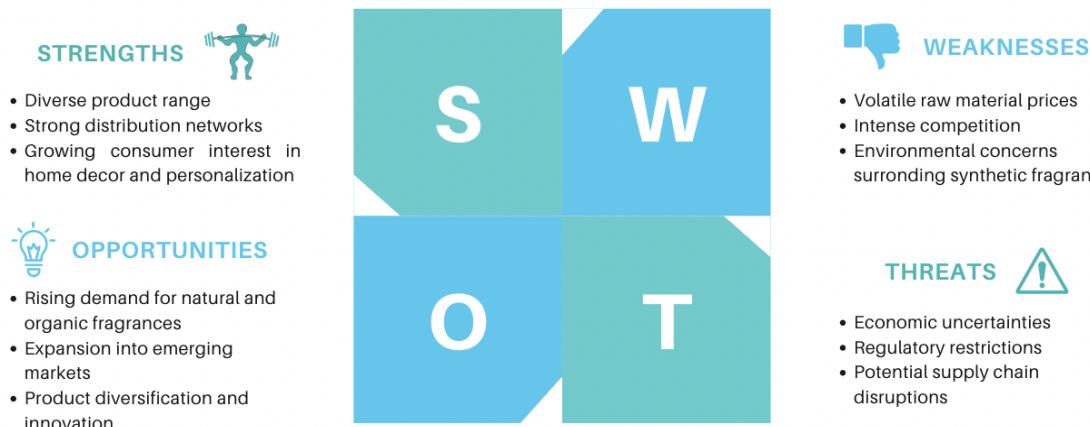


Figure 5.

From the *strengths* point of view, firms can try to offer a wide and diverse product range catering to different consumer preferences, they can try to exploit the recent trend of consumer's interest in home decor and personalization. Moreover, they can leverage a strong distribution network, including online channels and specialty stores to reach a wider range of clients and, moreover, they can invest in innovation and product differentiation.

The *weaknesses* that firms operating in the scented candles segment may have to face are: the volatile raw material prices that may impact the profitability of an organisation; there are environmental concerns surrounding synthetic fragrances and there is the problem of intense competition in the market.

The market offers some *opportunities* for further development like the rising demand for natural and organic fragrances that challenges firms to innovate and invest in research, the possibility to expand into emerging markets with growing disposable incomes (India and Brazil) and opt for product diversification and innovation.

Lastly, there are the *threats*, companies are influenced by the economic uncertainties that unfortunately impact the consumers spending habits. Every country puts its own regulatory restrictions on certain ingredients that can or cannot be used in home fragrances. Then, like it happened during the pandemic, there might be some potential disruptions in the supply chain due to unforeseen events.

2.3 PESTEL Analysis

The PESTEL Analysis is a tool used to evaluate the external environment of an organisation and it helps to identify the various factors that affect the company's operations, performance, and growth.

By analysing these factors, companies can gain insights about the opportunities and threats that exist in the market.

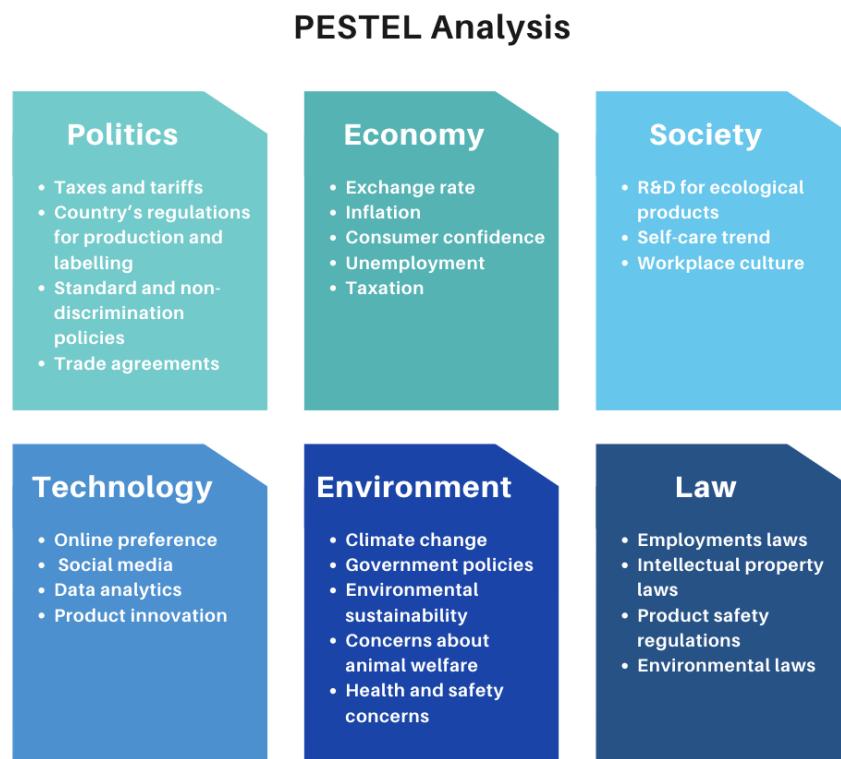


Figure 6.

Political factors: policies and regulations set by governments can influence the companies' business practices and profitability.

Strict regulations may lead to higher production costs that have a direct effect on pricing strategies.

Economic factors: they can comprehend the impact of exchange rates and fluctuations in the global currency market; the rising inflation and high unemployment rates that negatively impact consumers' spending; consumer confidence, which consists of the feeling of customers' uncertainty about the company and its financial stability; changes in tax laws or rates that can have significant effects on a firm's profitability.

2. Home fragrances market – Market overview

Social factors: for the success of all businesses, social factors play an important and crucial role. Among them, the most important one is the customers' increasing interest in personal well-being and self-care.

Another social factor that can be mentioned is related to the change in gender roles, men and women are equally interested in self-care.

Technological factors: they play a crucial role in the success of a business.

Thanks to online shopping, companies have the opportunity to invest more on their online presence.

To make a brand grow it is important to have a strong social media presence by using different platforms like Facebook, Instagram or Twitter.

Moreover, firms need to use data analytics in order to understand customers' preferences and shopping behaviour.

Environmental factors: between the various environmental factors that can affect a business there are climate change (extreme weather conditions), government regulations (environmental standards set by governments), environmental sustainability (recycling programs), the rising concerns about animals' welfare (strict regulations on animal testing), and health and safety concerns (air pollution, water contamination and chemical exposure).

Legal factors: these factors are related to the laws and regulations set by governments and have a strong impact on businesses.

As highlighted by means of the PESTEL analysis, it is evident that businesses have various opportunities and strengths to exploit in order to grow and strengthen themselves. However, firms also need to face some possible threats and weaknesses related to external factors that might be seen as a challenge for further development.

Despite these challenges, a firm in the home fragrances market needs to build a strong customer base and to adapt to changes in customers' preferences.

2.4 Porter's five forces framework

To stay ahead of competition, it is important for businesses in the home fragrances market to continuously assess competition and determine the critical factors that impact the company's business strategy, that is why it is necessary to conduct a Porter's five forces analysis.

The Porter's five forces framework is a useful tool that allows organisations to analyse their competitive environment and identify the key factors influencing the success in the market.

The *bargaining power of suppliers* affects the competitiveness of a company in the industry. In the case of the home fragrances market, the power of suppliers can depend on their concentration, the availability in the market of substitutes, the switching costs.

The *bargaining power of customers* determines the competitive intensity and attractiveness of an industry. To maintain its competitive advantage, a firm in the home fragrance market needs to offer high-quality products at competitive prices, focusing on customers' wants.

Regarding the *rivalry*, the home fragrances market is highly competitive and has to face many challenges considering quality, pricing and innovation in order to stay ahead of competitors.

The *threat of substitute products* is the extent to which customers can find similar products or services from the competition that can satisfy their needs. In the home fragrances and scented candles market there are many players offering a wide range of products so there is a high possibility for customers to choose between various brands. So, a firm needs to differentiate its products through innovation to appeal to a wider share of the market.

The *threat of new entrants* is used to analyse the competitiveness of a particular industry. In the case of home fragrances is the possibility of new potential competitors to enter the market. Some factors that affect the threat of new entrants are the high capital requirements to enter the industry, the exploitation of existing economies of scale, a strong brand recognition, some regulatory barriers, and the importance to use established distribution channels.

2.5 Home fragrances market trends in Italy

In recent years, and especially with the pandemic which has sparked a new interest in the domestic environment, fashion brands have increased investments in home collections, as demonstrated by the launches of the first furniture lines by Dolce&Gabbana and Mango.

An attention that has also extended to the home fragrances segment: among the most recent innovations, the six candles by Celine on sale since November only in selected boutiques, and the four by Armani/Casa for Luisaviaroma, in vegan wax.

Furthermore, last year saw the launch of the first collection of Missoni Home candles, recognizable by the colourful patterns of the Sumirago brand, and in 2019 Versace also presented a line of creations created in collaboration with Rosenthal, which offers the icons of the maison such as the Medusa and Greca, with vegan soy wax .

3. Scented candles market - Market overview

After analysing the home fragrances market as a whole, from now onwards, the focus shifts to its most interesting market segment for our purposes: scented candles.

By definition, scented candles are candles that are infused with fragrances, providing a pleasant aroma when they are burned.” These are made of a combination of wax, essential and fragrance oils. They come in various sizes, shapes and scents, offering consumers a wide range of options.

In 2022, the global scented candles market was valued at USD 481.61 million. The size of this market is expected to increase to USD 820.06 million by 2029, while growing at a CAGR of 7.9%.

The main reasons explaining such growth are:

- The *growing consumer awareness* about the benefits of aromatherapy, promoting relaxation, stress relief, and improved well-being.
- The *rising disposable income* due to the expansion of middle-class population.
- The *changing lifestyles* and preferences as candles become part of daily routines. Consumers are eager to enhance the aesthetic appeal of living spaces.
- Candles have become a popular *choice for gifting* on various occasions.
- The *rising demand for eco-friendly and natural scented candles*, that's why manufacturers are incorporating sustainable materials and using natural wax, such as soy and beeswax.
- The large *presence of e-commerce platforms* and online retailing that allow consumers to easily explore and purchase a wide range of candles.

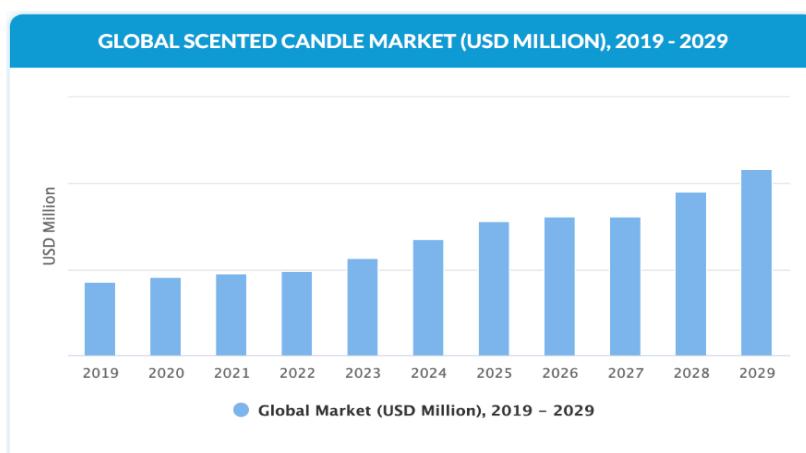


Figure 7. Source: Reanin (2023).

3. Scented candles market – Market overview

The market of scented candles is quite vast as it provides clients with many options to choose from, starting from product type (jar, pillar, tea light, tumbler, vase, and others), raw materials used (wax, liquid dyes, soy, glass, others) and fragrance (fruit, flower, spice, blends, others).

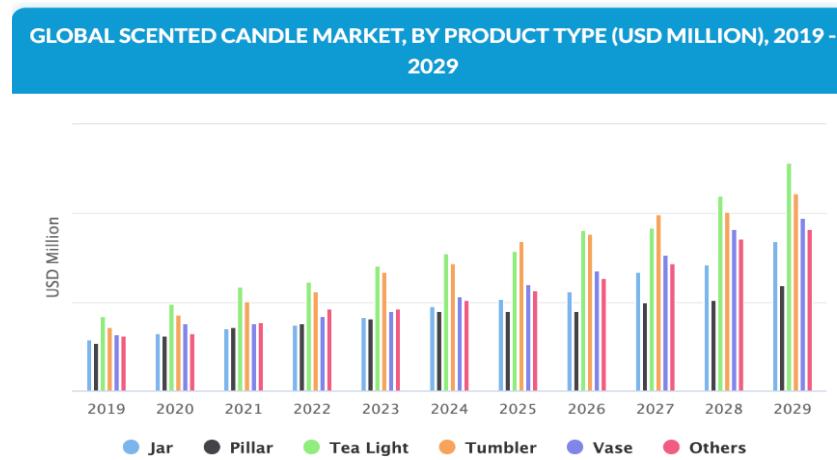


Figure 8. Source: Reanin (2023).

One of the main elements to consider when analysing scented candles is the material they are made of, because it represents the main source of cost for a firm and impacts its reputation in the eyes of consumers.

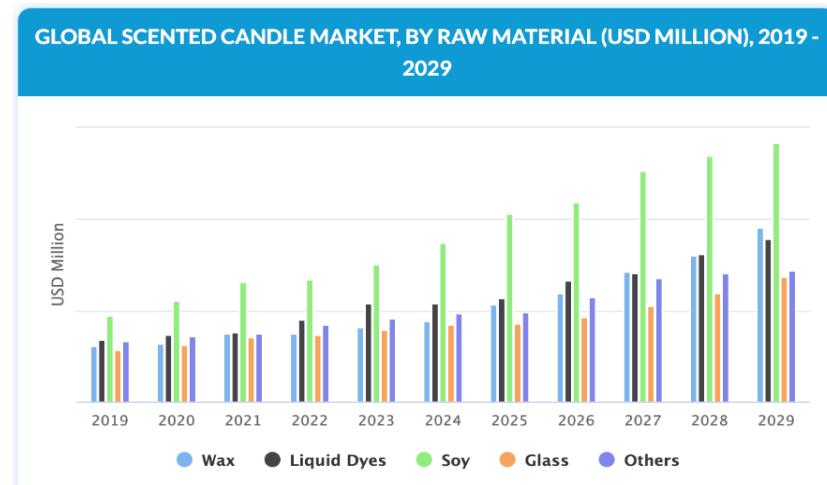


Figure 9. Source: Reanin (2023).

As illustrated in the graph above, the raw material showing the largest projected growth is soy. This insight appears to be particularly important since one of the most well-known issues that is arising in the industry is related to the negative consequences for human health derived from the usage of paraffin in many industrial scented candles. The extremely positive trend that can be observed for soy is explained this way, since it provides a green and sustainable

3. Scented candles market – Market overview

solution to the aforementioned issue and a valuable alternative to paraffin waxes. Cecilia's Home produces every candle using soy, a potential competitive advantage that must be considered.

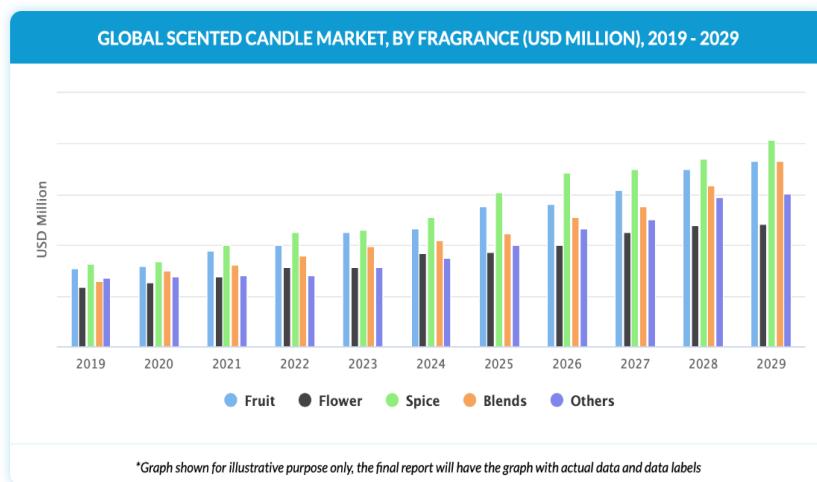


Figure 10. Source: Reanin (2023).

The market of scented candles is of course influenced by the customers' tastes hence firms need to offer a wide range of fragrances in order to satisfy them.

The main perfumes proposed in the market are fruit, flower, spice, blends of different scents and others. The most diffused ones are fruit and spice, but all scents are destined to expand.

Finally, in terms of geographical segmentation, North America and Europe are still the leaders even in this segment, as for the whole industry.

The reason why Europe can be considered a leader in the market is because European consumers have a long-standing affinity for scented candles especially in France, UK and Germany, the same countries that are leading the pack for home fragrances in general.

Furthermore, the market in Europe is driven by a combination of wellness trends, home decor preferences and a preference for luxury items that inevitably force brands to opt for innovation and investment in this sector.

3.1 Conceptual map

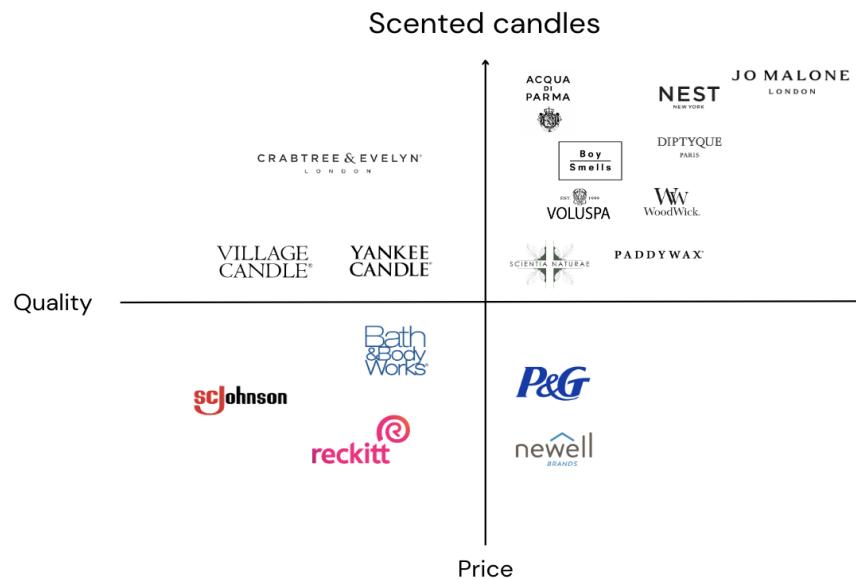


Figure 11.

The scented candle market presents itself as highly competitive, with numerous players operating at both a global and regional level. These companies focus on product innovation, strategic partnerships and expanding their distribution networks to gain a competitive advantage in the market.

The main manufacturers of scented candles are:

1. Yankee Candle Company
2. Bath & Body Works
3. NEST Fragrances

3.2 SWOT analysis

Even in this case, to focalize on the peculiar aspects of the scented candles market, a SWOT analysis was carried out.

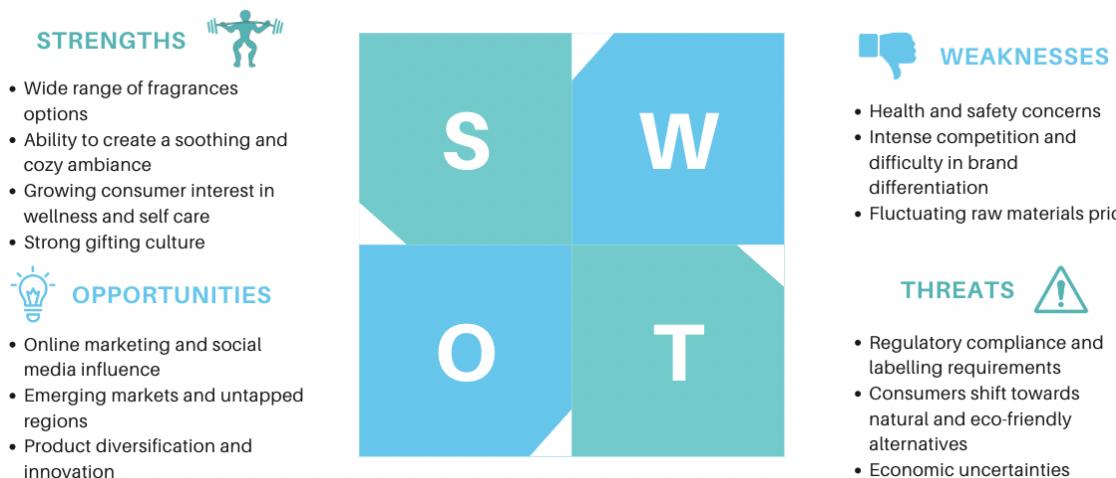


Figure 12.

For the *strengths* there is a wide range of fragrances options and product variables that firms can exploit. It is necessary for businesses to be able to create a comfortable and cosy ambiance in order to increase the consumer interest in wellness and self care. Moreover, given the strong gifting culture developed in the last years, it is important to create gift packages in accordance with various occasions, like birthdays, weddings, Christmas, and so on.

From the *weaknesses* point of view, firms need to consider the health and safety concerns associated with burning scented candles. Companies also are immersed into an intense competition and they found it difficult to differentiate their brand. They also have to face the difficulties in maintaining stable prices due to the fluctuation in raw material prices.

The scented candle markets offers a lot of *opportunities* that firms can decide to pursue: they can invest in product innovation and differentiation in order to get a bigger share of the market and attract new customers; they can spend money on online marketing and social media influence to make their brand more known from the public and also firms can decide to move to new emerging markets and untapped regions that might be interested in purchasing this kind of product.

Last but not least, there are the *threats*. Firms are challenged to respect the regulatory compliance and labelling requirements given by each country and also due to changes in consumer preferences and the shift towards natural and eco-friendly alternatives is an obstacle that companies need to overcome.

3. Scented candles market – Market overview

After the pandemic, a scenario of economic uncertainties has emerged, and it has a strong impact on consumer spending decisions, so firms need to consider this feeling and try to ameliorate their products to make them necessary, attract more clients and be more willing to purchase.

A fundamental aspect considered in this analysis is the price of candles. Simple scented candles' price can vary on average from 1.99\$ to 35\$, then there are some outliers belonging to the luxury industry that propose products at a higher price, usually from 50€ or more.

The cost of candles often reflects the quality of the ingredients that are used, the production methods employed and the packaging.

The market is also influenced by the prices of raw materials, such as essential oils and natural ingredients. Fluctuations in raw materials' prices challenge manufacturers in maintaining competitive pricing and profitability.

Moreover, businesses need to consider their environmental impact. Some products may contain synthetic chemicals that can have adverse effects on the environment, that's why consumers are increasingly looking for eco-friendly alternatives. For this reason, manufacturers can exploit the trend of producing natural and organic candles.

3.3 The scented candles market in Italy

The scented candle market in Italy has undergone exponential growth since 2000. Increasing consumption and use of the product in families and transforming it from a simple element of domestic use to a true furnishing accessory, a sign of the style of living in the house.

The introduction of perfumed essences in paraffin, combined with the most captivating shapes and the warmth of light made candles a success in the global market.

In Italy, as in the rest of the world, the market of home fragrances and scented candles lived a boom from 2019 till nowadays and it is forecasted to continue to grow.

The Italian market is characterised by many luxury brands, like Gucci, Armani, Acqua di Parma and Dolce&Gabbana to mention the main ones, which invested a lot in their own collections and started presenting their own line of scented candles with minimal and elegant designs and fragrances linked to their most known perfumes.

Also, there are many smaller brands that invested in innovation as their key representative element and most valuable asset. As a worth-mentioning example, Candle Street, a brand founded by three brothers in Milan, has developed a digital platform with which consumers can create their own personalised candle, using a special configurator.

4. Digital marketing analysis

The final section of this report is dedicated to a comprehensive digital marketing analysis of the home fragrances market, with a specific focus on the scented candles segment. The same approach used in the previous sections will be followed. Conducting this type of analysis is crucial for developing an effective marketing strategy.

In the following paragraphs, some of the most useful tools for carrying out this kind of analysis will be used, specifically: Google Trends, focusing on the comparison between the British scenario and the three most important countries in Europe for these types of products (namely, UK, France, and Germany); Ahrefs and Ubersuggest, analysing the most relevant keywords for Cecilia's Home, the scented candles segment, and the home fragrances market in general. Last but not least, two paragraphs will be dedicated to competitor analysis using the Semrush and Similarweb platforms.

By employing these tools and conducting a comprehensive digital marketing analysis, valuable insights can be acquired to shape an effective marketing strategy for Cecilia's Home, helping it thrive in the competitive home fragrances market.

4.1 Google trends

As previously introduced, the first digital marketing tool to be used is Google Trends. This tool allows users to have a look at the interest over time for different search terms. In this case it will be employed in order to understand how the interest of users about the most relevant keywords for this report's purposes has evolved over time, in particular the last 5 years.

4.1.1 Italy

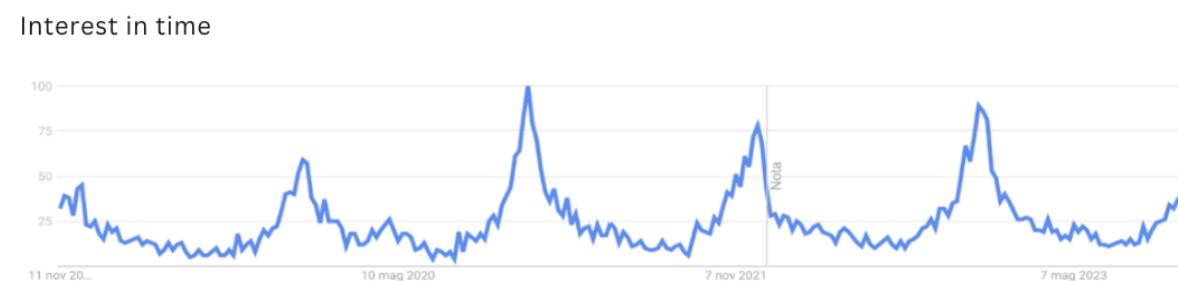


Figure 13. Source: Google Trends (2023).

4. Digital marketing analysis



Figure 14.

The first two figures provide an overview on the trend for the searches of scented candles in Italy during the last 5 years, also displaying the data about Italian regions. The purpose of this choice is to show in which regions the interest about scented candles is higher, a useful piece of information for Cecilia's Home, a small brand which may be more interested in a narrower analysis rather than a very broad scenario.

What can be easily noticed is an increase in the research for scented candles during December every year. This trend immediately allows viewers to understand that this is a product characterised by seasonality, in particular for the period that anticipates Christmas. In December companies produce many Christmas scented candles that allow people to dive into the holiday spirit through the gingerbread smell, or the fascinating packaging that well suits the decoration for the festivity.

In Italy, the region leading the standings for the number of researches about scented candles is Apulia, followed by Veneto (the region in which Cecilia's Home actually operates the most) and Basilicata. The same analysis has been conducted for home fragrances in general.

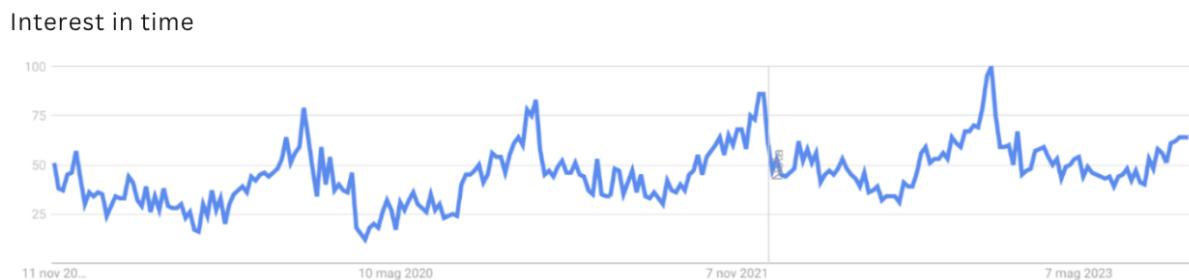


Figure 15. Source: Google Trends (2023).

4. Digital marketing analysis



Figure 16. Source: Google Trends (2023).

It appears clear that the trend is very similar, even if less pronounced, showing peaks in December for every year, a reason explaining why scented candles are considered a segment of this market and clarifying that this trend is probably influenced by scented candles themselves.

Focusing on Italian regions, the ones showing the highest interest are Basilicata, Campania and Apulia.

4. Digital marketing analysis

4.1.2 Comparison among Italy, UK, France and Germany

This second paragraph is dedicated to the aforementioned benchmark analysis, comparing the Italian market for the scented candles segment and the home fragrances market in general, with the three most important European countries in this sector. An overview that may be useful if Cecilia's Home, in the future, will plan to move abroad.

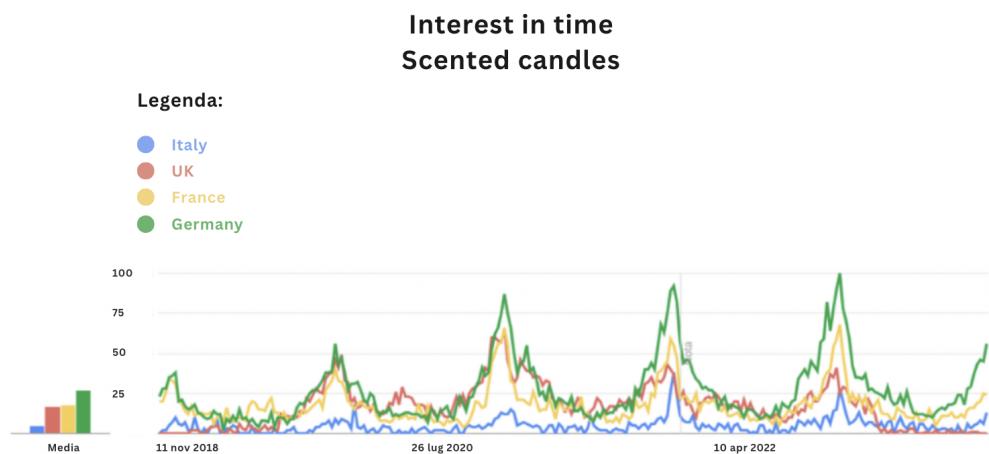


Figure 17. Source: Google Trends (2023).

The above picture shows the benchmark analysis for scented candles, the trend is common to every country analysed, but it also shows that the country with the highest interest is Germany, this evidence confirms what has been stated in the previous sections, since the German market is a clear leader in this field.

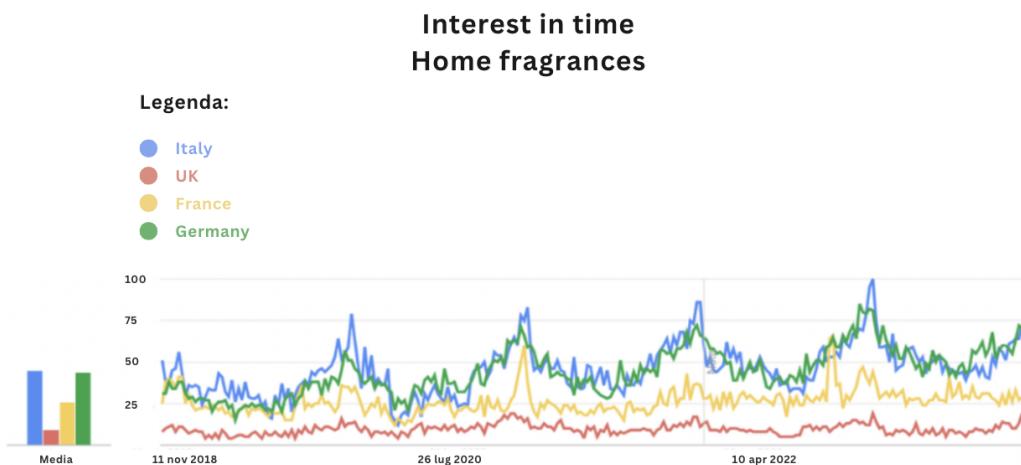


Figure 18. Source: Google Trends (2023).

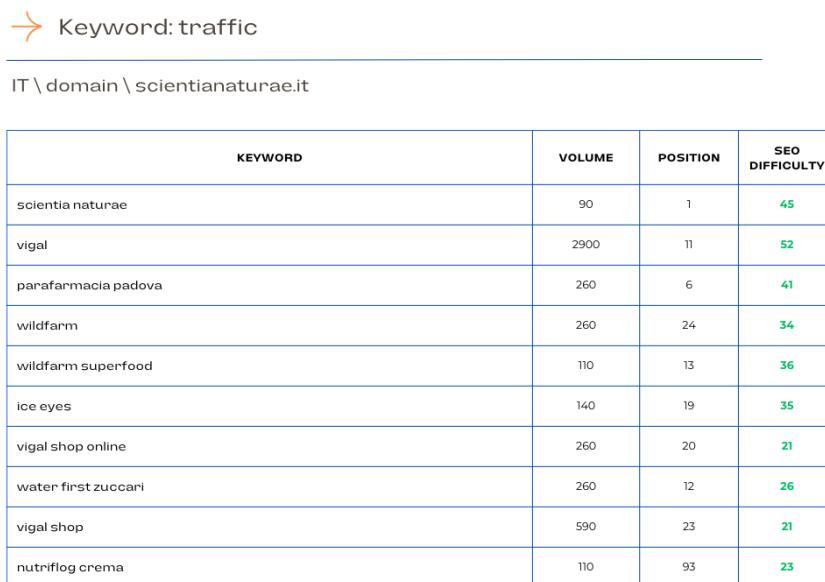
4. Digital marketing analysis

Carrying out the same analysis for Home fragrances in general, trends appear common even in this case, there is a seasonality showing peaks close to Christmas time, but here Italy seems closing the gap with Germany, at least in terms of the interest shown by Google users.

4.2 Keyword planners: Ahrefs & Ubersuggest

Moving from a broad analysis, it is now possible to focus on the keywords that generate traffic on the website. Ubersuggest is a comprehensive SEO tool designed to provide actionable insights for website optimization while Ahrefs' keyword research features help in tracking and monitoring a website's performance, analysing competitors, and identifying areas for improvement.

Considering that Scientia Naturaе's in-house brand, *Cecilia's Home*, does not have a website, the analysis first focuses on the main property (<https://www.scientianaturaе.it/>) for then looks at the most significant keywords and related queries.



KEYWORD	VOLUME	POSITION	SEO DIFFICULTY
scientia naturae	90	1	45
vigal	2900	11	52
parafarmacia padova	260	6	41
wildfarm	260	24	34
wildfarm superfood	110	13	36
ice eyes	140	19	35
vigal shop online	260	20	21
water first zuccari	260	12	26
vigal shop	590	23	21
nutriflog crema	110	93	23

Figure 19. Source: Ahrefs (2023).

Querying Scientia Naturaе's website does not provide useful information regarding the in-house brand. That is unsurprising given the low traffic volume underpinned by keywords related to a variety of products or, in most cases, brand names.

Accordingly, the current online store is not well suited for creating awareness about Cecilia's Home among potential candle buyers. These users tend to browse for specific brand names or can opt for more generic research surrounding candles and home fragrances. Below are presented, the top keywords for Italy, the UK, and France, in their respective languages.

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4.2.1 Home fragrances and scented candles keywords

A. Italy: Candele profumate - Profumatori ambiente

candele profumate	5	14K	profumatori ambiente	1	5.3K
candele profumate particolari	0	1.1K	profumatori per ambienti	2	3.3K
candele profumate yankee	1	700	profumatori per bucato	1	1.6K
candele profumate bomboniere	0	600	profumatori ambiente bastoncini	0	1.1K
candele profumate economiche	0	500	profumatori	1	700
come fare candele profumate	1	500	profumatori bomboniere	0	700
candele profumate migliori	0	400	baci milano profumatori	0	700
migliori candele profumate	0	400	edg profumatori	0	500
ikea candele profumate	0	350	bomboniere profumatori	0	500
bomboniere candele profumate	0	350	profumatori ambiente migliori	0	500

Figure 20. Source: Ubersuggest (2023)

B. UK: Scented candles - Home fragrance

scented candles	18	9.2K	home fragrance	7	1.6K
scented candles uk	30	1.4K	home fragrance diffuser	5	600
best scented candles	37	1.1K	home fragrance gift set	0	300
best scented candles uk	23	1.1K	best home fragrance	7	300
christmas scented candles	2	800	cleaves home fragrance	1	250
scented candles gift set	0	600	freckleface home fragrance	0	200
how to make scented candles	26	600	home fragrance oil	2	200
large scented candles	0	500	luxury home fragrance	12	200
luxurious scented candles	22	450	home fragrance oils	3	200
luxury scented candles	13	400	rituals home fragrance	0	150

Figure 21. Source: Ubersuggest (2023)

C. France: Bougie parfumée - Parfumeur

bougie parfumée	26	14K	l'artisan parfumeur	0	5.5K
bougie parfumée pas cher	0	900	le parfumeur film	0	4.2K
bougie parfumee	25	900	artisan parfumeur	0	3.6K
coffret bougie parfumée	0	800	bon parfumeur	0	2.8K
bougie parfumée naturelle	5	600	le parfumeur	0	1.6K
grosse bougie parfumée	0	600	film le parfumeur	0	1.1K
bougie parfumée maison	6	500	le bon parfumeur	0	1.1K
bougie parfumée luxe	0	400	l artisan parfumeur	0	700
meilleure bougie parfumée	1	300	parfumeur grasse	50	700
meilleur bougie parfumée	0	300	parfumeur paris	46	600

Figure 22. Source: Ubersuggest (2023)

4. Digital marketing analysis

D. Germany: Duftkerze

duftkerze	1	11K	rituals raumduft	0	13K
rituals duftkerze	0	4.4K	raumduft	0	9.5K
haribo duftkerze	0	1.7K	ipuro raumduft	0	8.0K
duftkerze rituals	0	1.1K	raumduft selber machen	0	2.7K
duftkerze im glas	0	1.0K	raumduft rituals	0	2.3K
glade duftkerze	0	900	raumduft stäbchen	0	1.4K
duftkerze selber machen	0	800	raumduft diffuser	0	1.3K
nivea duftkerze	0	600	nivea raumduft	0	900
duftkerze weihnachten	0	600	pajoma raumduft	0	900
holzdocht duftkerze	0	500	rituals raumduft sale	0	900

Figure 23. Source: Ubersuggest (2023)

From the above lists of keywords, we can see how, in Italy, users are looking for specific brand names, such as Yankee Candle; in the UK they are looking for the best option; while in France, they are also considering natural products. Across the markets, users are also browsing for information about candles, such as “how to make candles.” From this information, we can anticipate what should be the content driving traffic on Cecilia’s Home’s property if present: it is content related to making candles or educational material regarding how to use candles or the difference between the ingredients used.

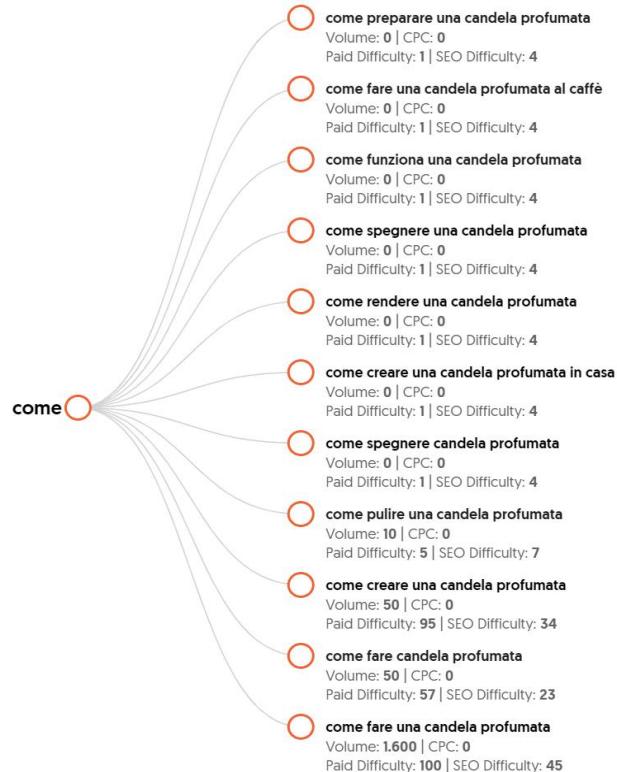


Figure 24. Source: Ubersuggest (2023).

4. Digital marketing analysis

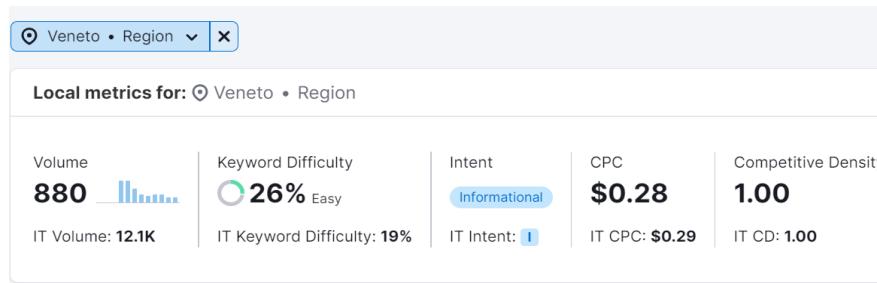
This is valuable information that should guide a future content marketing strategy. To bolster such a suggestion, anticipating the next section, we rely also on data drawn from Semrush. Moreover, Italy's search volumes are dwarfed in comparison with France and the UK's, thus indicating a larger addressable market, although there are nuances within the Italian market itself. As shown below, merging results found through these tools with Semrush's tools permits to consider differences between Italian regions, the greater interest shown in Lombardy in particular.

4.3 Semrush

4.3.1 Domain Overview

In the ever-evolving digital landscape, keywords hold a unique power that can make or break a website's success. They serve as a measure of traffic, providing insight into what users are searching for and how they can be directed to a particular site. Semrush has a range of features to analyse a website's search engine rankings, identify keyword opportunities, track competitors, etc. Importantly, this SEO (Search Engine Optimization) toolkit provides a comprehensive view of a website's ability to generate traffic using keywords as a reliable measure. In fact, through the domain overview tool, it is possible to gauge the traffic generated by Scientia Naturaе online property.

By querying for the specific website URL (<https://www.scientianaturaе.it/>), one can gain valuable insights into the popularity and reach of the website. Upon closer examination, a few areas of improvement emerge. Firstly, the property has a relatively *low authority score* of 5/100 points, indicating room for enhancement of the website's reputation. Moreover, Scientia Naturaе's website lacks optimization in various aspects, such as backlinks, organic search traffic, and the overall authenticity of its profile. Accordingly, the *organic search traffic* numbers are disappointing, showing a large area for improvement. Geographically, the traffic generated is primarily confined to Italy while it is organic in nature. As shown in the graph below, organic traffic is currently low despite an increasing number of keywords associated with the diminishing traffic in recent months. This result reflects the lack of optimization on the website. Most notably, keywords not properly related to Scientia Naturaе generate a significant portion of traffic, indicating the searches focus on branded products. This finding suggests that a refined keyword strategy and website optimization are required to attract more relevant organic traffic.



4. Digital marketing analysis

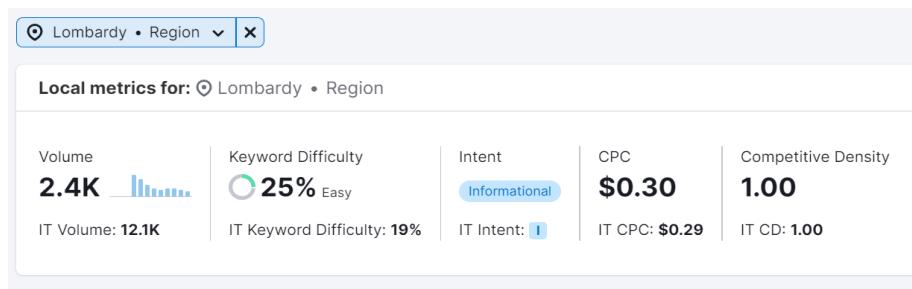


Figure 25. Source: Semrush (2023).

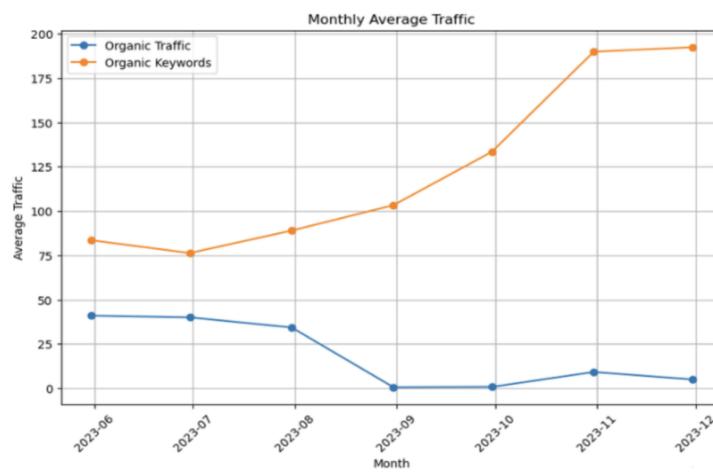


Figure 26. Source: Semrush (2023).

Furthermore, Scientia Naturaе's website does not rank high on Google SERP, except for the query "Parafarmacia Padova". As a result, it becomes challenging for users to find Scientia Naturaе's website, despite their informational and transactional intent. Given the relatively low number of keywords the website currently ranks for, there is ample opportunity for improvement, especially through relevant and informative content satisfying users' queries.

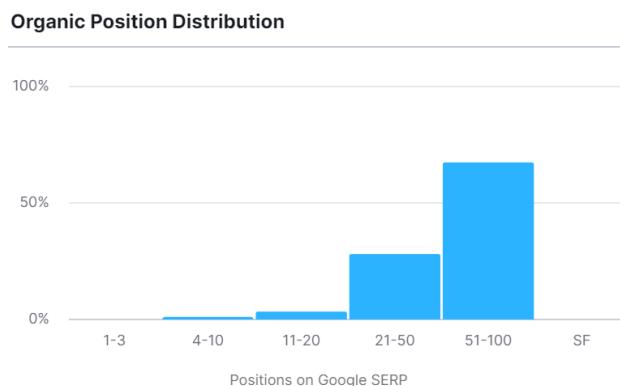


Figure 27. Source: Semrush (2023).

4. Digital marketing analysis

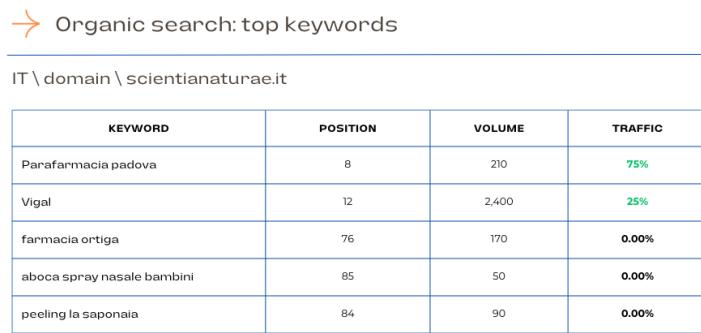


Figure 28. Source: Semrush (2023).

Moving on to *Cecilia's Home*, the house brand does not have its own domain, which limits the availability of direct data. However, the product offerings can be found on the Scientia Naturae website, and a closer analysis shows how traffic to these pages is close to zero. As Cecilia's Home focuses on candles and home fragrances, which are in high demand and generate various types of content, there is significant opportunity to analyse top keywords such as 'candele', 'candele profumate', or 'profumatori ambiente', to understand the market and related queries. This information can guide a potential content marketing strategy to enhance visibility and generate more targeted traffic.

4.3.2 Traffic Analytics

The approach employed to conduct a competitive analysis essentially addresses two questions: what distinguishes Scientia Naturae from its competitors, and what actions can Scientia Naturae take to narrow the gap with its competitors. Considering the limited available data, a preliminary analysis of competitors was conducted through Organic Research, focusing on the number of keywords for each competitor and the number of common keywords between them. It should be noted that the number of common keywords among organic competitors is relatively low. Furthermore, the results primarily pertain to pharmacies and herbal stores, with a limited number of parapharmacies.

Despite this, the obtained results highlight certain aspects that can undoubtedly be deemed important in understanding what sets Scientia Naturae apart from these competitors. One key aspect that emerges is based on an analysis of search intent, which refers to what the user is likely to do when searching for a particular phrase. Usually, SEOs classify search intent into four broad buckets:

- Informational intent: the searcher aims to uncover or acquire additional information about a particular subject.
- Navigational intent: the searcher wants to find a specific page.

4. Digital marketing analysis

- Commercial intent: a prospective buyer plans to undertake additional research before reaching a conclusive decision on their purchase.
- Transactional intent: the searcher already knows what they want and is ready to purchase.

Regarding Scientia Naturae, the informational intent and transactional intent are almost equivalent (38.3% and 41.5%, respectively). In contrast, among competitors, informational intent predominates (over 50%), surpassing transactional intent (on average 25%). Differences also emerge in navigational intent and commercial intent. On one hand, in Scientia Naturae, these two intentions are equivalent (9.9% and 10.2%); on the other hand, among competitors, commercial intent predominates (on average 17%) compared to navigational intent (on average 5%).

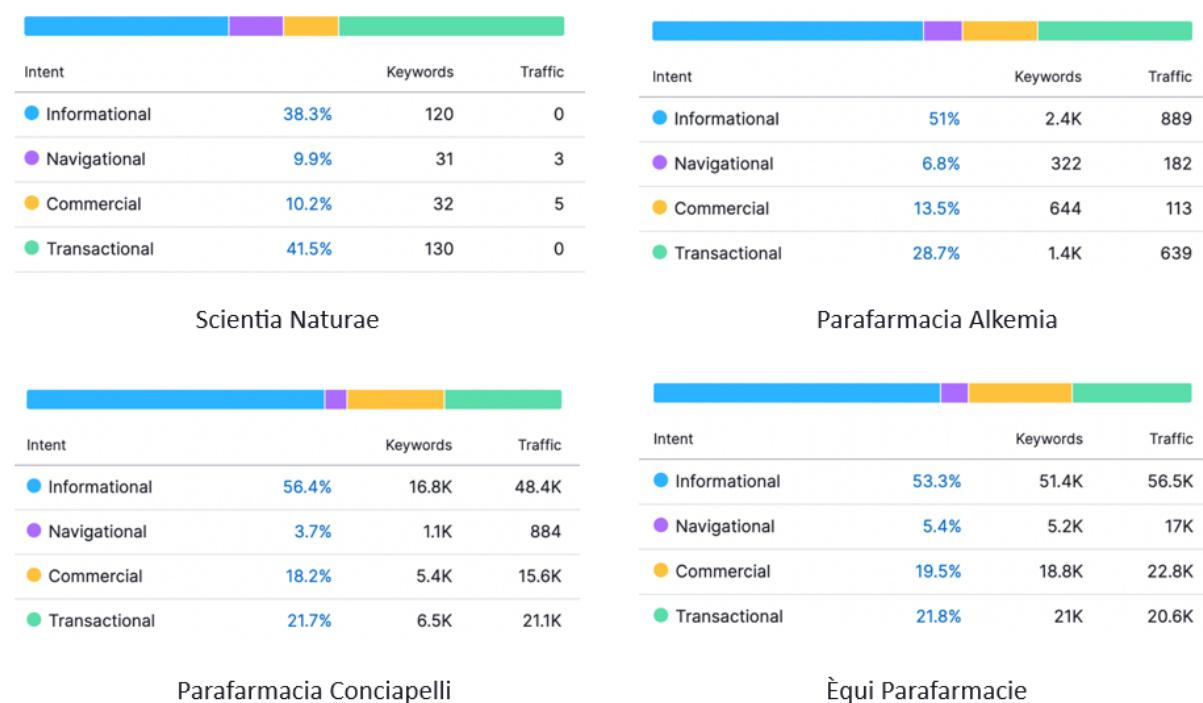


Figure 29. Source: Semrush, 2023.

The differences pertaining to informational intent reflect the choices made by competitors in optimising their websites, as well as their intention to create targeted blogs focusing on specific topics and enhance communication with customers. On the contrary, Scientia Naturae's website appears to be slow, inadequately optimised, and not user-friendly upon initial use. Another significant difference concerns commercial intent, although the variations are less pronounced in this aspect. On one hand, there is a trend among the customers of competitors to use the website for online product purchases, whereas in Scientia Naturae, this figure appears to be lower. In this case as well, the optimization of the online shop plays a decisive role.

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Diving into the details of the keywords used by Scientia Naturae and its competitors allows for further considerations. First and foremost, a substantial difference is evident in the number of keywords. Scientia Naturae, for instance, hovers around 185 units, whereas other competitors range from 1,000 to over 68,000 units. Consequently, this leads to a difference in the number of users expected to visit the domain, assuming the average amount of monthly organic traffic remains relatively constant. This figure is quite low for Scientia Naturae, while it is significantly higher for the competitors.

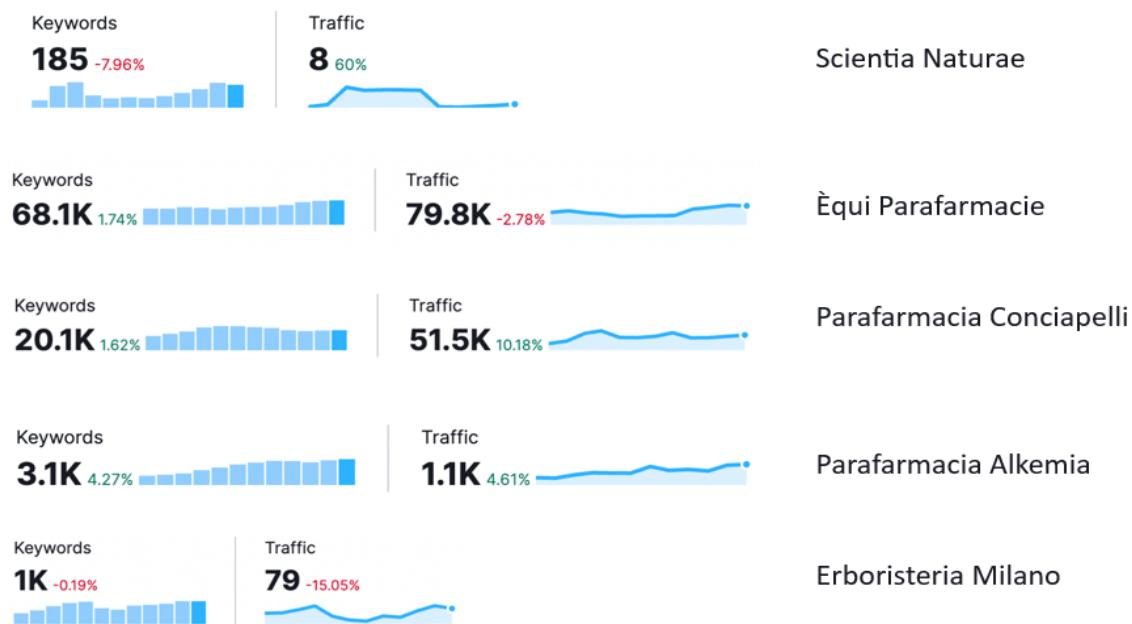


Figure 30. Source: Semrush, 2023.

Furthermore, the traffic generated by competitors primarily relates to keywords associated with their brands and products sold. This trend is observed to a lesser extent for Scientia Naturae. From the collected data, however, it is not possible to put forth any hypotheses regarding Cecilia's Home. Collecting data on Yankee Candle, a significant competitor in the candle sector, it is notable to observe the difference in the top keywords. For Yankee Candle, the keywords predominantly revolve around their own brand and the products they sell, whereas for Scientia Naturae, no keywords are associated with candles.

Given the inadequacy of relevant data obtainable from Semrush, the competitive analysis of Scientia Naturae can only be approached with a certain degree of approximation. Nevertheless, the decision was made to identify four competitors that, according to the authors' judgement, serve as a solid starting point for conducting a benchmark analysis.

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The selection has been made among three parapharmacies and an herbal store, two of which are based in Padua (Parafarmacia Conciapelli and Èqui Parafarmacie), one in Bologna (Parafarmacia Alkemia), and one in Milan (Erboristeria Milano). The analysis is centred on four Italian entrepreneurial entities, all situated in medium-to-large cities.

Unfortunately, it was not possible to utilise the Traffic Analytics and Keyword Gap functions of Semrush due to the lack of data for Scientia Naturae. For this reason, the analysis can only be tied back to what was mentioned earlier.

A clear, user-friendly, optimised, and visually appealing website undoubtedly serves as an advantage for Scientia Naturae's competitors. It is likely to be one of the reasons why their websites generate more traffic and interactions. This is particularly crucial for Cecilia's Home products, as they are not prominently featured on the Scientia Naturae website but rather confined to a small page.

4.3.3 Backlinks

A backlinks analysis is a crucial tool for evaluating the credibility and visibility of a website. It involves examining the quantity, quality, and relevance of incoming links from other websites. This analysis provides valuable insights into the website's authority, competitive landscape, and opportunities for improvement.

As previously noted, Scientia Naturae's website has a low authority score. This is caused by a number of factors, including its backlinks status which shows a relatively low number of connections to the domain's properties. Importantly, the existing referring domains (i.e., domains to which backlinks are referring to) are low-grade thus representing a potential hiccup for the website.



Figure 31. Source: Semrush (2023).

The backlink profile of Scientia Naturae is then open to ample improvements:

- Increase external backlinks: Scientia Naturae's website currently has a relatively low number of external backlinks. Expanding the network of partners and acquiring high-quality backlinks from relevant websites can significantly extend the website's reach and improve its authority.
- Improve backlink quality: The existing backlinks for Scientia Naturae are predominantly originating from low-score domains. Focusing on acquiring backlinks from high-quality

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domains will enhance the overall authenticity score of the website. Prioritise building relationships with authoritative and trustworthy websites in the niche.

- Manage Do-Follow Backlinks: The proportion of do-follow backlinks seems to be high, which might expose the website to potentially risky websites. Carefully selecting the partners, in a mix of do-follow and no follow links, will reduce exposure to risky websites.

Additionally, Semrush provides the top anchors (based on the number of backlinks) which are basic personal care products so not related to candles or home fragrances.

Backlinks: Top Anchors

IT \ domain \ scientianatureae.it

ANCHORS	PERCENTAGE	DOMAINS	BACKLINKS
igienizzanti mani - parafarmacia scientia naturae padova - farmacia online	7%	7	34
vitry -smalto amaro riparatore sensitive - scientia naturae	5%	14	22
erboristeria magentina benex crema - scientia naturae	4%	11	19
pur essentiel - gel igienizzante mani - parafarmacia scientia naturae padova - farmacia online	4%	6	19
mentadent - collutorio vitamina c - scientia naturae	3%	9	15

Figure 32. Source: Semrush (2023).

The absence of specificity further decreases the ability of Scientia Naturae to vie for the most coveted positions on Search. To improve search engine visibility and capture relevant queries, it's important to acquire niche-specific backlinks that align with the subpages focused on candles and home fragrances.

In this analysis we propose a different set of competitors, namely the herbal stores and pharmacies. From the research conducted on the above mentioned seo tools, it is clear that Scientia Naturae, despite offering a new range of handmade products, is not well suited for competing in the home fragrance and scented candles product categories. Their online channels gather a low amount of traffic but, most importantly, they are not creating awareness nor attracting users interested in said products. The following sections will highlight the main competitors' online behaviour, as well as the characteristics of the visitors.

4.4 Similarweb

The Scientia Naturae/Cecilia's Home website traffic is entirely attributable to organic search, with no significant interest coming from socials and no investment in paid traffic.

Its competitors, having higher sales volumes and being less capital restricted, are exploiting other market channels, while still having direct and organic searches as main traffic sources. In the scented candles and home fragrances markets, the direct and organic search still accounts for 72% of the overall websites traffic. Social Networks and paid advertisement are the two other main channels exploited by competitors.

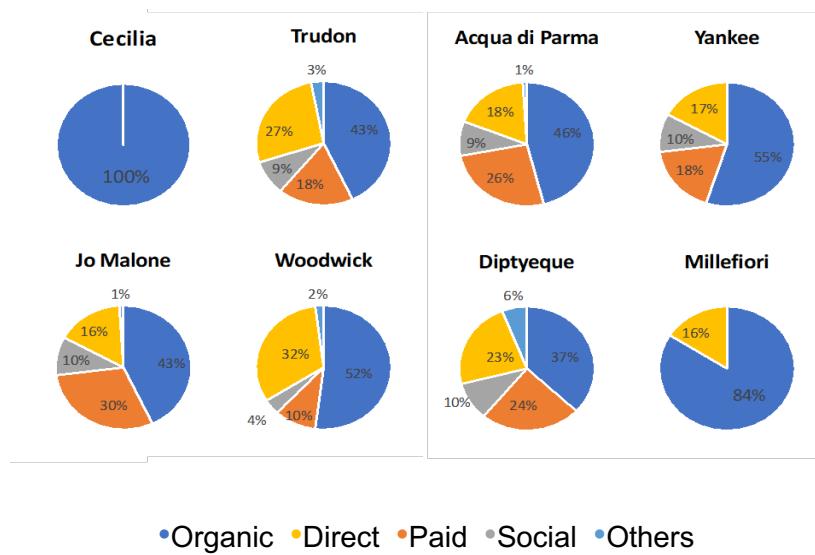


Figure 33. Source: Similarweb (2023).

The traffic stream generated from the companies' socials are often responsible for around 10% of the traffic. The main social network leading to these traffics is YouTube, followed by Instagram, with the exception of a few cases that can generate big traffic using Facebook. When brands opt to invest in paid advertisement, they usually manage to cover a considerable portion of their overall traffic. The average portion of paid search (calculated only on companies that do invest in ads) is 22% of the companies' searches. Their CPC, on the paid traffic averages to around 0.75 USD, highly depending on the use of the correct keywords for visitors. In fact, the CPC tends to increase considerably for search terms slightly different than the brand name, probably attributable to already less interest in the brand. The top ad publishers are Google and YouTube for most of the brands, with a few others using notorious newspaper publishers like the NY times.

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The bounce rate in this industry, representing the percentage of visitors that only visit one page before leaving the website, has a significant variance, going from the low 15% of Millefiori Milano to a costly 55% of Acqua di Parma. The overall average for the considered competitors equals 41%. A few reasons that we can attribute to the worst performing sites for this indicator are slow loading speed of the website and unappealing/confusing home pages, that will discourage customers from continuing to browse.

This industry is heavily dependent on mobile data traffic rather than desktop traffic, with an average of 79% visitors using mobile.

This is also supported by most websites being optimised for smartphone usage showing different homepages and better layouts.

Overall, Scientia Natura/ Cecilia's Home being a much smaller brand has fewer channels opportunity being capital restricted. However, it also fails to deliver traffic from less capital-intensive channels like socials, which other brands are exploiting with great results.

Being entirely dependent on organic search limits the possibility of new customer acquisition and increase engagement that would benefit the brand in the long run.

4.4.1 Demographics of data visitors for Scientia Natura/ Cecilia's Home and its competitors

On Similarweb, the website of Scientia Natura does not present any data for the demographics of its visitors. Regarding its competitors however, we can analyze the gender distribution and age distribution to understand the main characteristics of the typical customer for the scented candles and home fragrances market.

Gender distribution

Both the scented candles market and the home fragrances market show a clear dominance of the female demographic.

However, we notice a strong correlation between strength of the female demographic and low product diversification of the brands. In fact, brands that diversify in similar markets tend to also expand into men's products, therefore decreasing the strength of the female demographics.

For example, Acqua di Parma with its men's perfumes and shaving products, reaches almost a 50-50 split between men and females. On the other hand, companies like Jo Malone that only has a small selection for men, reaches 73% of female demographics. The industry average yields 62% of female and 38% of male visitors.

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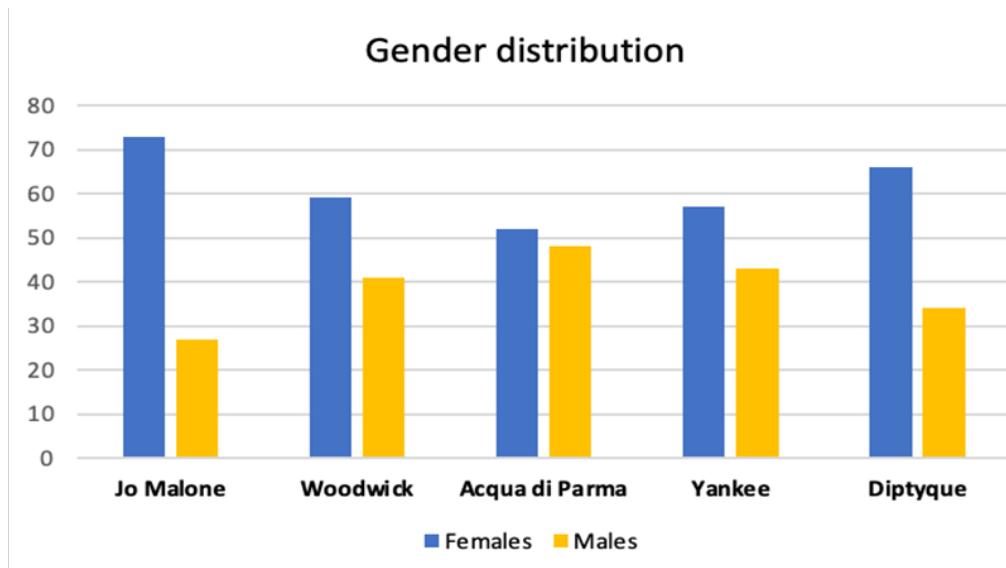


Figure 34. Source: Similarweb (2023).

Age distribution

Dividing ages into 6 segments we noticed that in both markets the highest age distribution of competitors is in the 25-34 segment, with an overall linear distribution and a descending pattern towards the higher age segments.

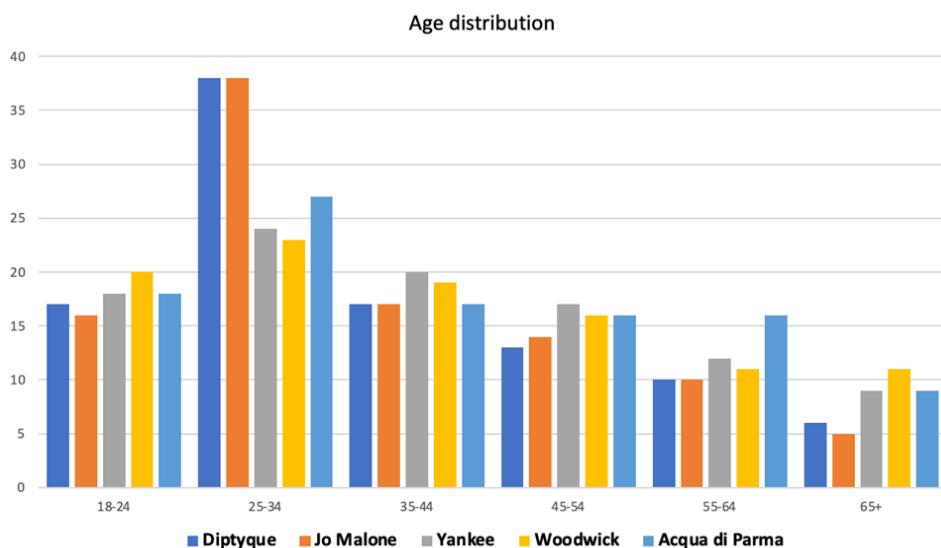


Figure 35. Source: Similarweb (2023).

Diptyque and Jo Malone show a clear strength in the 25-34 segment that we believe to be coming mainly from social networks and paid advertisements, with the ultimate goal to target such demographics. Overall, for most brands, the female demographics, between the age of 18 and 44, covers 50% of the market, and 25% only coming from the dominant age segment.

Main interest of the visitors of Scientia Naturae/Cecilia's Home and its competitors

Scientia Naturae/Cecilia's Home does not show any data for visitor's interest on Similarweb. Analysing the browsing habits of visitors of competitors' websites, we noticed a strong prevalence of two leading categories: Social Networks and Fashion and Apparel.

The graph below shows the leading interest for competitors' visitors and how much that particular industry covers the overall percentage of research for those users.

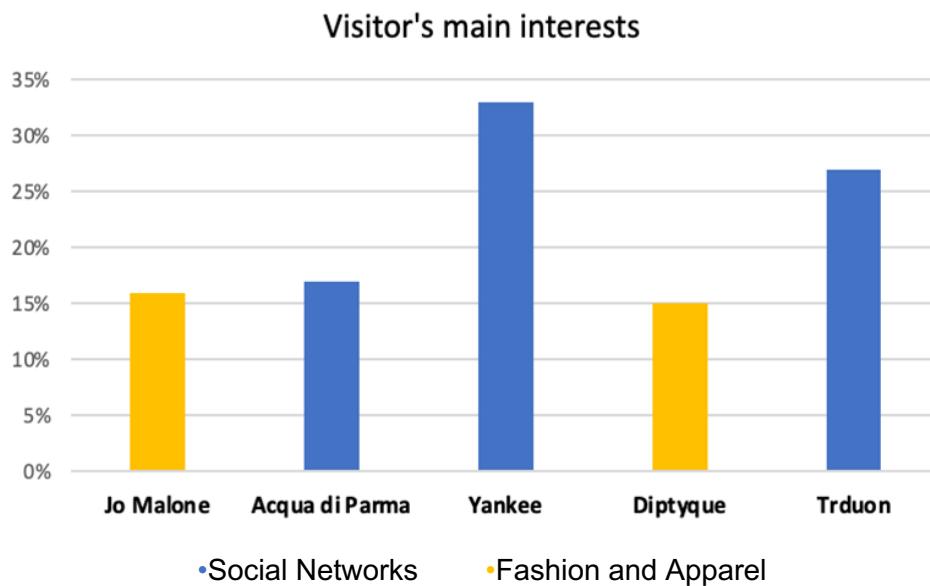


Figure 36. Source: Similarweb (2023).

However, the clear lead of the Social Network category is not industry specific.

Indeed, this is the overall most researched category in the entire internet at present time. Therefore, we find that the significant result of this analysis is the strong interest in fashion and apparel shown by the visitors of the scented candles and home fragrances markets. These browsing habits prove that the target customer, along with the demographics shown before, has recurrent behaviours and search interest that allow brands for a more tailored proposition to its customer, backed by a more accurate and reliable market segmentation.

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