

12-2018

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Citation

Chang, Dae Ryun. Cosmetics: Men get it too. (2018). 5, (2), 34-39. Asian Management Insights.

Available at: <https://ink.library.smu.edu.sg/ami/99>

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COSMETICS: MEN GET IT TOO!

The marketing of men's cosmetics is challenging conventional wisdom in Asia.

By Dae Ryun Chang

Men and beauty seem to be two contradictory domains because we often rely on an outdated assumption that men only want to appear manly and nothing more. The reality for modern men, however, is significantly different from that perception. This is especially so in many Asian countries where more and more men are daring to express how they want to look, and therefore use not only a vast array of skincare items but also, and increasingly, makeup. This subtle drift in approach to men's beauty and consumer habits in Asia are currently challenging strongly held conventional marketing wisdom and the ways in which marketing and branding approaches might need to change over time or across regions.

The cosmetics industry has taken note and an increasing number of products are being developed and marketed specifically to men. Whereas growth in global sales in the women's beauty sector has been steady, there has been a far greater expansion in revenues for its male counterpart. The global men's beauty/grooming industry was estimated to be about US\$21.4 billion in 2016.¹ This market, including men's bath and shower, deodorant, skin and hair products, is expected to reach US\$60 billion by 2020.²

According to Euromonitor, the region of greatest growth for the global grooming industry will be Asia Pacific.³ If Asia's compound annual growth rate (CAGR) of 8.1 percent were to continue beyond 2020, it would most likely become the largest grooming market in the world, displacing Western Europe, which was predicted to have

a much lower CAGR of 3 percent between 2015 and 2020. From the marketing calculus of global cosmetic companies—if they are interested in maintaining growth—this trend means that more attention has to be paid not only to men, but also especially to those in Asia. And South Korea, the country that gave us Gangnam, K-pop and some of the latest cell phones, leads this new revolution in male consumption—the men's grooming market.

Regional differences in men's beauty

Asia, perhaps with the exception of Japan, was a laggard in the mass adoption of consumer products. A good example would be the market for luxury products and brands. Whereas personal motivation drives demand for luxury in the West, in Asia these are more symbols of social status. Asian buyers thus typically sought brands that ostensibly signalled their position in society, mostly in order to be accepted by their peers.

Because flamboyant grooming and fashion in Asia do not take on the connotation of one's sexual orientation as in the West, men can be bolder and quicker to adopt new and riskier styles.

A similar pattern can be seen in how Asian men have also been late adopters of men's beauty products. The irony, however, is that their late arrival has allowed them, such as with mobile technology and social media, to leapfrog the slower and more conservative adoption of cosmetics by men in Western countries. Part of this may be cultural, since open discussion of sexuality is taboo in Asia. But because flamboyant grooming and fashion in Asia do not take on the connotation of one's sexual orientation as in the West, men can be bolder and quicker to adopt new and riskier styles.

Through popular cultural products such as movies and TV shows, we can easily compare and contrast the visual aesthetics for what counts as masculine and well-groomed between Asia and the West. In the latter, there is a tendency to equate manliness to rugged-looking men with facial hair.⁴ This differs in Asia where 'pretty boy' images are more familiar and acceptable. Hollywood has sometimes perpetuated distorted stereotypes of Asian men as being emasculated or the roles at times have been subjected to 'whitewashing'.⁵ Against that backdrop, the success of the movie *Crazy Rich Asians* in 2018 is noteworthy not just for its all-Asian cast but also by the new representation of an Asian (played by Henry Golding) as a desirable leading man in a mainstream American movie.

A big caveat here is to ensure that even within Asia we do not commit to a pan-Asian generalisation about grooming aesthetics. Kantal Worldpanel, a Spanish market research firm, interviewed over 5,000 Asian men and found that men in the Philippines, Vietnam and Malaysia cared more about communicating status professionalism,

whereas in China, appealing to the opposite sex was much more important.⁶ In Indonesia, it was the Halal-certified men's grooming products that were spearheading the market and growing at 7 percent per annum.⁷ In India, men have more facial hair and so may conform more closely to a Western style of grooming.⁸ So while common patterns might exist in Asia, marketers ultimately need to tweak the grooming products for individual national markets.

South Korea is the 'lead market'

Even with local sensibilities being different, there are markets that other Asian countries look to as a general reference when adopting lifestyle trends. This is what is called a 'lead market' and is akin to opinion leaders among individuals.⁹ The South Korean men's cosmetics market reached about US\$1.5 billion in 2016, which was more than 10 times the size of the industry from just a decade ago. It represents over 20 percent of global sales for men's cosmetics even though the country has a total male population of just 25 million.¹⁰ The average Korean man uses about 13 cosmetic products on a monthly basis.

South Korea has become a 'lead market' (like Japan before it) via a combination of its tangible economic success, globally renowned companies such as Samsung and Hyundai and, more recently, its 'soft power'. It has been riding a powerful cultural wave (called *Hallyu* in Korean) since the late 1990s, thanks to its movies (aka 'K-Movies' e.g. *My Sassy Girl*), soap operas (aka 'K-Drama' e.g. *Jewel in the Palace*), pop music (aka 'K-Pop' e.g. *Gangnam Style*) and women's beauty products (aka 'K-Beauty' e.g. AmorePacifc).¹¹ The four areas often overlap through celebrity endorsements.

The explosive debut of the boy band BTS has also drawn new interest in the West and has a global legion of fans called the "ARMY". They already had a reputation throughout Asia for being a top group not only because of their music, dancing, and the social consciousness of their songs, but also for their fashion style.¹² They are just the latest in a long string of boy bands that have pushed the boundaries of the aesthetics of male masculinity. The fact that they used once-taboo items such as eye pencils and lip products allows non-celebrity men to follow suit.

New men's beauty segments

Besides the classic metrosexual and ubersexual customer segments, men's grooming businesses have also tapped into other market opportunities: 'NOMU', 'JOOBAEK' and 'YUMMY'. NOMU was an acronym for 'No More Uncle' and represented men who wanted to rid themselves of the derisive 'uncle' tag that was a euphemism for old or unfashionable.¹³ In the past, NOMUs attempted to be trendy just with clothing, but by the turn of the century they were turning more and more to grooming.

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ARE YOU A NOMU?

MK magazine, a major Korean daily, offered the following checklist to gauge whether one was a NOMU (to be classified as a 'No More Uncle', one needs a 'yes' response to five or more items):¹⁴

1. I care about my looks.
2. Having an interest in many different topics helps in my self-development.
3. I try actively to communicate with younger generations.
4. I am above average in taking risks in fashion and grooming.
5. I can easily reveal my tastes and that affirms my individuality.
6. I don't deliberately try to stand out like young people, but try to be different.
7. I become nervous if I do not use social media at least once a day.
8. I access news more through mobile phones or iPad rather than via conventional media.
9. Work is important but not as much as time spent with my family.

JOOBAEK was a moniker for Weekend (*Joomal*) Department Store (*Baekhwajum*) Warrior and connoted middle-aged men who no longer stayed at home or just accompanied their wives and family for shopping, but instead went shopping alone to reward themselves. Unlike their parents who preached individual sacrifice for spouse or family, both NOMU and JOOBAEK represent Asian males with new attitudes that it was now okay to be self-indulgent. Unlike the past when they passively wore what their girlfriends or wives bought for them, more and more men shop alone to discover what pleases them and helps become more individualistic. JOOBAEK and NOMU may not be mutually exclusive since there could be some overlapping characteristics, such as their age group. Instead of being completely different, JOOBAEK could be considered a sub-segment of NOMU that has higher incomes and a greater need for physical self-expression.

Another new segment uncovered by HSBC researchers was YUMMY—Young Urban Male—perhaps derived from the old YUPPIE (Young Urban Professional) concept popular in the 1990s.¹⁵ They have very exclusive tastes for restaurants, cars, fashion, watches and grooming. The rise of YUMMY, in Korea at least, appears to be in part a reaction to the rise of the Gold Misses—a term used to describe unmarried women with a high socioeconomic status and level of education. Many of the descriptors of YUMMY are



consistent with the Gold Misses, who have been iconic to Korean marketers and their legions of followers.¹⁶ YUMMY are also young, single and often living alone, but unlike the previous generation of men, they take good care of their faces and bodies. Spurred on by television shows showcasing sexy male chefs, they relish learning about and cooking haute cuisine for themselves and friends.^{17,18} They also drive the demand for expensive grooming products such as anti-ageing serums, as well as pore management products and fragrances. As part of their need to be pampered as men, their havens of choice are high-end barbershops.

A new-old service of barbershops

Marketing success is often achieved by making something old into something new. In the case of men's grooming, it is the reinvention of the traditional barbershop. In the past, barbershops were where men went to get a shave and haircut—plain and simple. In recent times, metrosexuals also started to frequent hair salons, but for much more than a simple shave or trim—they were looking to get a perm, highlights, or a more demanding hairstyle. All of this spelled the demise of old-style barbershops.

At first in the U.K., and then in the U.S., barbershops have made a comeback by revamping themselves.¹⁹ Men still get a shave and a haircut, but also so much more. Barbershops have transformed themselves into full-service beauty salons offering customised grooming to match one's face type, hair and even profession. These shops typically cater only to men even though women who want their boyfriends or husbands to transform themselves into more confident and better-looking partners may take customers there.

The community and 'chatty' aspect of a barbershop for men may be something from the past, but it has found new life in an updated and localised form to appeal to modern Asian men. The 'Asianisation' of the barbershop by barber chains such as HERR (with multiple outlets in Seoul and Hong Kong) aims to position it at the high-end and to offer grooming services like shampooing that men have come to expect in Asia but not elsewhere. A typical sitting begins with a consultation

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about skin and hair and, to put the customer in a relaxed mood, at some places comes with a glass of single-malt Scotch whiskey. It can even include tips on fashion and eating, making it a total lifestyle shopping experience.

The men's beauty market is a further illustration that the *Noon Nopi* (literally meaning the eye level in Korean and referring to consumer needs) of a dynamic region such as Asia is constantly evolving and marketers need to match that.²⁰

Where does this trend take us?

Men's grooming trends in Korea could be used to forecast future demand patterns for follower countries.²¹ Besides cosmetics, Korean men also use products and services such as mask packs, facial peels, dermatologists, and cosmetic surgery. For purchasing channels, the primary ones are drugstores, online open markets, and one-brand shops. As for sources of influence, the major ones are online product information, advice from wives or girlfriends, friends, and online user reviews. The online channels provide a convenient channel for millennials who are often too busy to shop offline. Moreover, it allows them to buy potentially embarrassing products without the glare of onlookers.

Marketers can also analyse from a sociological standpoint what drives the demand for men's beauty products in Korea. If similar fundamentals exist in the follower countries, then predictions

about those markets would become more assured. While many reasons can be cited, ultimately they revolve around one key factor, 'hyper-competition' not just in education but also in meeting the opposite sex, getting and keeping a job, and looking good. Another reason is the need to look young both in social circles and at work. In contrast to the Confucian cultural principle that revered the aged, modern times have revealed a decided preference for youth since it is equated with ability.²² It looks like the men's grooming industry is here to stay, and grow.

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