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Shinji Oyama

THE EMERGENCE OF PAN-ASIAN BRANDS: REGIONAL STRATEGIES OF JAPANESE COSMETICS BRANDS

Abstract

In this article, I analyse the regional strategy of luxury Japanese cosmetics brands to investigate the claim of the Japanisation of Asia. I begin by examining the emergence of pan-Asian advertising for Japanese cosmetic brands. I then make the case for an emphasis on branding, as distinct from advertising, which changes the way in which we understand this regional phenomenon. I explore the different ways in which a brand engages consumers, and argue for a sober assessment of the relative importance of advertising (and the salience of image of country-of-origin) in the overall branding process. I then follow the regional circulation of Japanese brands and media contents, neither of which can any longer be understood coherently in a national framework such as Japanisation. I argue that the globalisation of advertising in Asia is a complex process shaped by large multinational corporations and a disjunctive flow of media contents, and that a more pronounced focus on brands will help to make sense of this process.

The globalisation of advertising is clearly modified by the forces of regionalisation (Sinclair and Wilken, 2009).¹ In East Asia and its thriving media culture, one way in which the regional inflection of globalisation manifests itself is through the marked presence of advertising for Japanese brands on a scale and depth unimaginable outside the region.²

The advertising of Japanese brands is nothing new, even in the most remote corners of the world, but it takes a distinctive form in East Asia. In addition to the usual suspects advertising brands of consumer durable goods, such as Sony or Honda, one finds a wide variety of Japanese non-durable FMCG (fast-moving consumer goods) brands in the region, including everything from beverages and fashion to cosmetics. In East Asia, we see Japanese brands such as Qoo (a beverage brand) or RMK (a chic cosmetic brand) alongside Western global brands like Coca-Cola or Estée Lauder. The presence of these FMCG brands, and with them myriad forms of advertising, contrasts sharply with their near-absence in non-Asian markets. Global Japanese brands like Sony are known to carry out a significant degree of localisation in advertising to efface signs of ‘Japaneseness’, to the extent of becoming ‘culturally odourless’ (Iwabuchi, 2002: 27–28). In contrast, Japanese FMCG brands in Asia engage in far less localisation in advertising, and some of them are beginning regional standardisation. In pan-Asian campaigns by Japanese cosmetic brands, as I discuss later, a vast number of consumers from Bangkok to Seoul are exposed to identical advertising — featuring Japanese models and Japanese languages in copy or narration — that have been essentially designed for the domestic market and thus come across as unmistakably Japanese.

There have been almost no studies of this regional phenomenon in media and cultural studies, and it has only recently begun to be discussed in the management literature (Hakuhodo, 2002; Yamashita, 2006). Nonetheless, there is an unsubstantiated and rather nationalistic discourse, propagated in Japan by top politicians,³ bureaucrats⁴ and cultural commentators (Nakamura, 2006; Sugiyama, 2006), about the way in which the globalisation of Japanese brands is (or should

be) taking place; this may be summarised by the phrase, ‘Love the country, love the brands’. The discourse to which I refer in this article as ‘Japanisation’ is explicitly and implicitly influenced by Americanisation and its famous axiom: ‘trade follows the film’. As scholars of cultural imperialism have long insisted, American films have been the greatest source of advertising for American brands in the global market, building a sense of yearning for a constructed American way of life. Similarly, advocates of Japanisation are starting to sound as if ‘trade follows the *manga*’. In this view, the globalisation of Japanese brands — and their accompanying advertising — goes hand in hand with the spread of Japanese popular culture such as *manga*, animation and popular music. To support this, it is often claimed that there are more Japanese brands in East Asia, where the influence of Japanese popular culture has been strong, than there are in Western and other non-Asian markets, where the Japanese cultural influence is far more limited. Taken together and stripped to the bare bones, these claims amount to a rather simplistic take on the globalisation of advertising in Asia and the impact of the media: Asian consumers buy Japanese brands because they love Japan and its media contents. Therefore, the more Japanese the advertising appears to Asian consumers, the better.

In this article, I analyse the regional strategy of luxury Japanese cosmetics brands to investigate the claim to Japanisation of Asia, and in doing so address the theme of this special issue: the globalisation of advertising in Asia and the impact on media. I start by examining the emergence of pan-Asian advertising of Japanese cosmetic brands in some detail. I then turn my attention from advertising to the brands and demonstrate how an emphasis on brands changes the way in which we understand this regional phenomenon. I analyse the different ways that a brand engages consumers and argue for a sober assessment of the relative importance of advertising (and salience of image of country of origin) in the overall branding process. I also follow the regional circulation of Japanese brands and media, both of which can no longer be understood coherently in a national framework. I argue that globalisation of advertising in Asia is a complex process that is shaped by a disjunctive flow of media contents and that a more pronounced focus on brands will help to make sense of this process.

Cosmetics

With annual sales of the top 100 brands topping US\$140 billion, cosmetics are a big business (Tiplady, 2007: 27). Cosmetics are also closely tied to such cultural ideas as beauty, youth, modernity, biological race and the image of country-of-origin. According to *Advertising Age*’s ‘Global Marketers’ in 2008 L’Oréal, the biggest company specialising in cosmetics, spent \$3.4 billion on advertising in 2008, surpassing car giants GM and Toyota to become the third biggest spender after Procter & Gamble and Unilever, whose diversified businesses also include cosmetics.

Japanese cosmetics brands have competed successfully against Western brands in the world’s second largest domestic market, and sped up international expansion — particularly in East and Southeast Asia (Jones et al., 2007; Kawashima, 2007). A casual stroll through luxury department stores in major East Asian cities would confirm the extent of the Japanese presence in the region. Let us map these spaces in terms of brands’ generally perceived country of origin in Tokyo, Taipei, Hong Kong, Seoul, and — for the sake of comparison — London.⁵ Of the 40 brands on the ground floor of Tokyo’s trend-setting Isetan department store in Shinjuku, 24 are Western and 11 are Japanese. The Western-to-Japanese ratio is thus 31 per cent. The rate is 26 to eight in Sogo Causeway Bay in Hong Kong (29 per cent); 26 to 12 in Taipei’s massive Shin Kong Mitsukoshi (The Xinyi Branch A8) (30 per cent); and 22 to five (along with four Korean brands) in Lotte in Myung Dong, Seoul (22 per cent). In London’s Selfridges, it is 32 to two, a mere 6 per cent. Clearly, the industry is still dominated by Western brands, mostly French and American.

Nevertheless, the Japanese presence relative to that of the Western brands in East Asia is significant, considering that its market share is as high as in Japan.

Pan-Asian advertising

Perhaps all the more remarkable for observers is the absence of localisation in advertising for these Japanese brands in East Asia. In the late summer of 2008 in Taipei, one would be greeted (as I was) by an abundance of Japanese faces: actresses Misaki Ito and Yuri Ebihara for Shiseido MAQuillage, actresses Haruka Igawa and Miho Kanno for Kao Sofina, and actress Nanako Matsushima for Kosé were adorning the counters and appearing in various local media exactly as they do in Japan. Shiseido MAQuillage, one of Shiseido's regional brands, is currently using advertising designed in Tokyo with minimal localisation in eight Asian countries. This regional experiment started in 1997 in Hong Kong and Taiwan; Shiseido saw these locations as offering its most receptive audience and serving as a regional hub to Chinese-speaking Asia.⁶ Since then, the pan-Asian experiment has come to include Thailand, Malaysia, the Philippines, Singapore, Indonesia, Korea and, in 2009, China, as if to keep pace with the circulation of Japanese media content.

Shiseido, the world's fourth to sixth largest cosmetics company (depending on the year), has global brands for which it designs global, and thus inevitably generic, advertising campaigns centring on the use of Caucasian top models. Despite it being a regional brand, however, the advertising for Shiseido MAQuillage has never been consciously designed for an expanded Asian market.⁷ Instead, MAQuillage is designed primarily as a national 'mega' brand and, like many Japanese campaigns (Kawashima, 2006), its advertising is heavily dependent on not one but four of the hottest Japanese celebrities. In addition to the two mentioned previously, these celebrities include Ryōko Shinohara, and Chiaki Kuriyama, who are little known outside of Asia but are familiar faces in the region thanks to the circulation of Japanese popular culture.

What is left for local offices is largely adaptation: the translation or localisation of the main and body copy of the print ads and the dubbing of voiceovers for television ads, but not the main campaign theme or its key visual elements. The room for local creative input in both print and television is thus limited. In one television ad that was part of a regional campaign in 2006, Misaki Itō, the brand's longest-standing muse, is shown having a flirtatious conversation with a young man, a Japanese actor named Shōta Matsuda, in a trendy bar. In the Hong Kong version, the only localisation is the insertion of Chinese subtitles for the conversation in Japanese, making the Japanese origin of the commercial abundantly clear. In contrast to the rigid standardisation in creative production, Shiseido localised other aspects of the campaign, as is common in Japanese international marketing (Oishi, 2004). For instance, media planning and buying as well as sales promotion have largely been relegated to local subsidiaries. The Tokyo office does not control the selection of advertising agencies, unlike Western brands, which usually prefer to work with the same multinational agency in a network assignment on a global scale (Sinclair, 2007; see also *Advertising Age's* 2008 Global Marketers Report, Part 2). At the time of the interview with Shiseido marketers, the Hong Kong and Taiwan offices worked mainly with local agencies rather than with their domestic partners, Dentsu and Hakuhodo.

Recent decades have seen an increase in the number of regional advertising campaigns not only by Shiseido but also by other Japanese companies, including Kao, the toiletries giant, and Kosé, Japan's second-largest cosmetic company. The geographic space in which pan-Asian advertising flows seems to coincide with the flow of Japanese popular culture, which could be seen to underwrite the phrases 'love the country, love the brand' or 'trade follows the *manga*'. However, this oversimplified national framework does not describe the regional circulation of Japanese cosmetic brands and the impact of the media accurately. To better account for this regional dynamic, I propose that we shift perspective from advertising to brand.

Brands take centre stage

Advertising is part of a bigger phenomenon, namely the brand. Over the last decade, the brand has become the main strategic aim and central organising principle of a growing number of businesses (Clifton, 2003). I first analyse the way in which a brand is reconfigured as experience and locate the relative importance of advertising for the brand. I then analyse the structure that governs the globalisation of brands and look at the impact of the media on this process.

Let me first map out the differences between advertising and branding, which are sometimes treated as one and the same. The original function of a brand was to make it possible to distinguish between otherwise undistinguishable goods or domesticated animals, to identify their producers and owners, and to guarantee quality (Moor, 2007: 16–17). Fast-forwarding to the twenty-first century, brands have evolved into something far more complex. As the global brand consulting firm Interbrand puts it:

A brand is a mixture of attributes, tangible and intangible, symbolized in a trademark, which, if managed properly, creates value and influence. ‘Value’ has different interpretations: from a marketing or consumer perspective it is ‘the promise and delivery of an experience’; from a business perspective it is ‘the security of future earnings’; from a legal perspective it is ‘a separable piece of intellectual property’. (www.brandchannel.com/education_glossary)

While each of the different forms of value production merits full analysis in its own right, what is of particular relevance to this article is the consumers’ and marketers’ perspective — the promise and delivery of an experience — that ultimately provides the basis for other forms of value production. This focus on experience among branding practitioners corresponds with the attention to the ‘experience economy’ in the last decade. Pine and Gilmore (1999) famously made a bold and broad-brush claim that the ‘experience economy’ was to be the next stage of evolution, succeeding the service economy. Taking a cue from this, but focusing more specifically on brands, a body of management literature reconfigures branding as the design and management of the total experience that consumers have in/through a great number of ‘contact points’ (Davis and Dunn, 2002), ‘touchpoints’ (Hakuhodo, 2006) or ‘interfaces’ (Lury, 2004) that exist between them and the brand. In this reconfiguration, advertising is important, but nonetheless is one of many interfaces through which consumers encounter brands.

Anything that can be perceived or sensed can be an interface. Interfaces for a cosmetic brand may include products, package design, multi-sensory presentations in retail space, sales staff, staff uniforms, call centres or websites. There are also other interfaces such as journalistic comments, reactions to the product from friends or family, and blogs or SNS (social network services), which retain a greater degree of autonomy from marketers (Arvidsson, 2006: 7). The focal point of these interfaces is cosmetic counters. They are as much static and semiotic spaces filled with shiny logos and supersize glittering photos as they are dynamic and corporeal-affective spaces where generally good-looking and trained ‘beauty advisers’ interact with consumers in a theatrical fashion. Much marketing research has found that people such as cosmetics beauty advisers have a demonstrably greater impact on brands than does advertising (Smith and Wheeler, 2002: 100). For brands like shu uemura, which does little mass media advertising, and to a lesser extent Shiseido, which spends less on advertising but relatively more on staff training compared with Western brands like Lancôme, cosmetic counters are the most important multi-sensory experiential space for the delivery of the brand.

This does not mean that advertising is not important. Rather, advertising and other interfaces always interact with each other; through this interaction, the intensity of brand experience is heightened or dampened. The sensation generated by shu uemura lipstick’s new texture and never-before-seen colour achieved by the latest ‘hybrid pigment technology’, or an intimate

makeup consultation with a beauty adviser can be made more (or less) pleasurable by cultural meanings and associations developed through advertising. In this reconfiguration, the importance of the constructed image of the country of origin in advertising, which is considered decisively important in Japanisation discourse, has to be reconsidered thoroughly.

Brands changing hands

Let us now look at how the globalisation of Japanese cosmetics brands is taking place. Brands are now arguably the most important corporate asset for brand-driven companies, as brand value can account for as much as 70 per cent of the company's market value (Lindermann, 2003: 29). Just like other intangible corporate assets, they are now legally protected as intellectual property and are exchanged not in consumer markets but in a global business-to-business market. Indeed, recent decades have seen various forms of brand-driven economic exchange, which has made the Japanese brands an elusive category and complicated the process of their globalisation.

First, there has been explosive growth in brand-motivated mergers and acquisitions. In luxury cosmetics, merger mania has sent most major brands into the hands of a small number of powerful groups, including L'Oréal, Estée Lauder, LVMH (Louis Vuitton Moët Hennessey) and Shiseido. The second form of brand-driven economic exchange is brand licensing. This is the leasing of the use of a brand by a brand owner to another company in return for the payment of royalty fees (Perrier, 1998: 104-113). All of the large groups take advantage of this more flexible form of brand exploitation to enhance their collection of brands or brand portfolio, forming partnerships with top fashion designers across national borders.

Since the 1980s, L'Oréal has acquired French brands including Lancôme, American brand Maybelline New York, the British brand The Body Shop, and Chinese brands Mini Nurse and Yue-Sai, as well as the Japanese makeup brand shu uemura (Jones et al., 2006). In addition, the French giant has licence agreements with the likes of Italian fashion designer Giorgio Armani and the American fashion brand Ralph Lauren. It has thus come to boast a brand portfolio of more than 20 brands from different continents. Estée Lauder and LVMH have equally large, although somewhat less multinational, portfolios.

In comparison, Shiseido has been less aggressive but has nonetheless acquired Western brands and developed brands to bolster its portfolio with those brands that do not bear the corporate Shiseido brand. These Western brands include Carita, Decléor and Nars Cosmetics, all of which have their origins in Paris and are marketed globally. Shiseido also has a licence agreement with famed French fashion designer Jean-Paul Gaultier, Cuban-American fashion designer Narciso Rodriguez and the globally recognised Japanese fashion designer Issey Miyake (Jones et al., 2007).

If we look again at Asian department stores, we can see that these four groups, along with Kosé and Kao, own as much as 70 per cent of all brands across all of the stores. Brands under these groups enjoy an almost prohibitive advantage over independent brands in terms of finance, research and development, marketing and human resources. Nonetheless, the relationship between different brands within a single group, such as four L'Oréal brands (Lancôme, shu uemura, Biotherm and Giorgio Armani) and four Shiseido brands (Nars Cosmetics, Shiseido MAQuillage, IPSA and Parfums Jean-Paul Gaultier) remains invisible to ordinary consumers as they navigate the ground floor in Taipei.

A brand portfolio is developed to target different market segments, but it also enables companies like Shiseido or Kosé to adapt to varying perceptions and attitudes towards Japanese brands in different national and regional markets. In short, while Japanese model Yuri Ebihara is the official face of Shiseido MAQuillage in Taipei, Shiseido is Japanese only when it wants to be. The rest of the time, it is happy being Chinese, American, French, or anything else that sells. In East Asian department stores, where Japanese brands go a long way, Shiseido relies more on

its corporate Shiseido brands, as we saw with Shiseido MAQuillage. In contrast, it relies heavily on acquired Western brands in non-Asian markets, as we see in Selfridges in London, where it deploys not only Shiseido, but also Nars Cosmetics and Decl or, as well as its prized licensed fragrance brands Jean Paul Gaultier and Narciso Rodriguez (Asakawa and Doz, 2002).

Kos  and its subsidiary Albion are taking advantage of their multinational portfolio to a greater degree. While Albion has a number of domestic brands, its expansion in the Asian market, and to a lesser extent in the West, has been driven by three Western licensed brands, all developed in partnership with a fashion brand, including one American brand — Anna Sui Cosmetics — and two French brands — Sonia Rykiel Beaute and Paul & Joe Beaute. Growth of the licensed brand has been strong in Asia according to the industry journal *Kokusai Sh gy * (2007: 110–13). Indeed, the strategy seems to be working on the cosmetic floor in Taipei, where Paul & Joe Beaute, Sonia Rykiel Beaute and another licensed brand of Kos , Jill Stuart (originally an American fashion brand), are drawing a great number of customers.

Thus the globalisation of Japanese brands would seem to be a process that is more complex than, and can even contradict, the aphorism ‘loves the country, loves the brand’. How do we account for this process, and what is its impact on the media? Anthropologist Arjun Appadurai (1996) famously characterises globalisation in terms of a growing ‘disjuncture’ between different flows or ‘scapes’. That is, under globalisation, ‘people, machinery, money, images and ideas now follow increasingly non-isomorphic paths’ and ‘disjunctures have become central to the politics of global culture’ (1996: 37). The dynamics of globalisation of Japanese brands need to be analysed in terms of a contingent relationship between different flows rather than the older image of centre-peripheries,   la Americanisation or Japanisation. Following Appadurai’s argument, I suggest that in this particular case, the regional flow of media images and information, or the East Asian mediascape, is formative of other flows (such as of capital or technology), leading to the emergence of pan-Asian ‘Japanese’ brands of different guise and nationalities.

East Asian mediascape

There has been a massive flow of media content from Japan to the rest of Asia that is just starting to be analysed (Iwabuchi, 2002, 2004). In the circulation of cosmetic brands in Asia in particular, marketers emphasise the significance of the vast circulation and popularity of Japanese women’s fashion magazines over the last few decades. For example, at the height of its popularity in 1995, one Japanese women’s fashion magazine, *Nonno*, was — in its original Japanese version — the most popular magazine of its kind in Taiwan, ahead of any local magazines or localised/original Western magazines (Ishii, 2001: 147). Today, hundreds of Japanese magazines in many different genres are licensed across the region. The Japanese publisher Shufunotomosha alone has had 12 licensing deals in Asia signed between 1995 and 2006.⁸ *Ray*, a women’s fashion magazine with a domestic circulation of 250,000, has been licensed to local publishers in China, Taiwan and Thailand, where it boasts circulations of 780,000, 70,000 and 120,000, respectively.

Local licensees for *Ray* would translate and publish as much as 60 per cent of the original Japanese editorial content, although this is lower than the 85 per cent seen in the earlier days of licensed publication. Brands are omnipresent in both original and licensed forms in such publications, not only in advertising, but also in the advertorial and editorial pages. As far as women’s fashion magazines are concerned, the boundaries between advertising and editorial pages, real and unreal, become harder to differentiate and even irrelevant to consumers in Japan and, to a larger extent, in Asia, where they are less familiar with Japanese contexts. As Appadurai writes when explaining the general characteristics of a mediascape, ‘the lines between the realistic and the fictional landscapes ... are blurred, so that the farther away these audiences are from the direct experiences of metropolitan life, the more likely they are to construct imagined

worlds that are chimerical, aesthetic, even fantastic objects' (1996: 35). Let us take a closer look at this imagined world in the September 2008 issue of the Taiwanese edition of *Ray*.

The localised magazine with an identical cover has 14 features in fashion, beauty and entertainment, of which 11 are literal translations from the Japanese edition, representing the quintessential texture of the East Asian mediascape. One of the five beauty features is the seven-page 'Autumn Cosmetics Battle: Student vs OL (Office Lady: Japanese female office worker)', in which two models, posed as an OL and a student, playfully compete in presenting the latest in cosmetic products and makeup styles. In many ways, the feature is very Japanese in style and content. The image of the OL is one of 'pink collar', a typical representation of Japanese female workers who are working as assistants to their male colleagues. Likewise, the image of the student is not so much one of a serious student, but rather of a model consumer, as is so frequently the case in Japanese media. The article's unambiguous objective is to achieve *mote-kei*, a style overtly focused on attracting men without aggressive sexual appeal or individuality that has been the pinnacle of Japanese femininity for the last decade. With typically Japanese detailed step-by-step visual makeup instructions, over 20 product photos per page, and overtly cute illustrations and fonts, a great number of cosmetics brands are presented in different settings. Advocating a slightly more mature, intelligent, and shimmering look, office worker Rika recommends Dior, Estée Lauder, Givenchy, Yves Saint Laurent and Lunasol (a Kanebo brand). Aoi, posing as a student and represented here as a cute type, introduces brands that are only slightly less luxurious, such as Lancôme, RMK, Paul & Joe Beaute, Jill Stuart and Esprique Precious (a Kosé brand).

This 'editorial' feature is designed to include a wide range of brands, all of which are, not coincidentally, advertisers for this particular Japanese issue, without appearing too ad-like. As far as Shufunotomosha is concerned, the Japanese publisher and advertisers have no interest in stipulating which pages of the original Japanese edition are to appear in other localised editions. Operating under more freedom than licensees of syndicated Western publications, local editors are able to decide what to use and pay for, according to local taste as well as production cost considerations. Thus the surprising lack of localisation in local editions is not forced but is a voluntary choice made by local editors.⁹ Consequently, Japanese women's fashion magazines have been inadvertently functioning as pan-Asian media, delivering images and brand information across the region.

However, contrary to what the 'trade follows *manga*' assumption suggests, massive circulation of these magazines does not necessarily favour Japanese brands in any simple way. Japanese editors have no incentive to privilege Japanese brands such as Shiseido over foreign brands such as Lancôme. The editors merely work for advertisers that are as international as those we see in the Isetan ground floor, which is only 30 per cent Japanese, and in *Ray*'s feature. Insofar as a brand has a presence in Japan, regardless of its origin, it then becomes part of the East Asian mediascape flowing from Tokyo to the rest of Asia. These brands may or may not be available in other markets at the time of their appearance in Japanese magazines. Some of the brands in *Ray*'s feature, for instance, were not available in Taipei. However, such spatial and temporal gaps will be, and always have been, quickly filled by marketers as consumers increasingly demand simultaneous access. The internet has greatly accelerated the speed and volume of this flow. On a growing number of websites like www.hudie.com, fashion-conscious Asian users scan and share pages from Japanese fashion or beauty magazines, from *Nonno* and *Ray* to hundreds of others, literally hours after the latest issue has come out.

Indeed, brand marketers are keen to capitalise on this mediascape, as stated by Mr Hayashi, Albion's executive, who says that advertising and a strong presence in department stores in Japan has a ripple effect on the Asian market (*Kokusai Shōgyō*, 2004: 107–8). In Taipei, Paul & Joe Beaute emphasises its popularity in Tokyo in promotion, routinely citing its sales ranking in

Shinjuku Takashimaya, a department store, and rave reviews in *VoCE*, a Japanese beauty magazine. Its international sales manager in Tokyo suggests that, for local consumers (thanks to the East Asian mediascape), the French licensed brand Paul & Joe Beaute — with its girly and slightly retro brand identity — might be as Japanese as it is French, and as much a part of Tokyo culture as Shiseido or Kanebo. L'Oréal is more aggressively taking advantage of the increasingly disjunctive media flows; it acquired shu uemura and has successfully exploited its potential in the Asian market, particularly in China but also in Taiwan, where it is the second largest cosmetics brand. The company's shrewd global strategy is well encapsulated in a statement by its long-serving former CEO, Lindsay Owen-Jones:

We didn't just accept to have local brands. We tried to put our brands everywhere. We sell the United States to the Americans, the United States to the Chinese, Italian elegance to the Japanese, French beauty to Africans, and Japanese chic to Brazilians. (Owen-Jones, quoted in Jones et al., 2006: 10)

Trade does not follow the *manga* after all, at least not in the simple way that Japanisation imagines. Instead, the globalisation of 'Japanese brands' — be they home-grown, licensed or foreign-owned — is taking place, and should be understood, through the flexible organisation of disjunctive flows by enormously resourceful global agents such as L'Oréal and Shiseido. Technology, finance and other scapes seem to follow the disjunctive East Asian mediascape from, for instance, Paris and Tokyo to Taipei, as seen with Paul & Joe Beaute, or from Tokyo, Paris and Hong Kong to Shanghai, as seen with shu uemura.

Conclusion

The emergence of pan-Asian advertising is the most visible sign that marketers are starting to take notice of the emergence of regional commonality, or what Chua (2004) has called East Asian popular culture, in a region that has been hitherto defined only as a geographical unity. This regional sensitivity is shaped more than anything else by a disjunctive mediascape, of which Japanese media content comprises a large part.

It would thus be tempting to conclude, as did the last few Japanese prime ministers, that we are witnessing the Japanisation of Asia, in which Japanese brands are snatched up by Asian consumers raised on Japanese media content to love anything Japanese. I hope I have demonstrated, however, that a shift in perspective from advertising to brands would shed new light on the dynamics and structure through which global corporations address emerging regional markets, which would have been masked in an analysis focusing on advertising alone.

Let me summarise my two main arguments, each with wider implications beyond my particular case and sector. First, I argue for a sober assessment of the relative importance of advertising as part of the whole of the branding process. I believe this is crucial because most of the world's biggest brands, and the almost religious loyalty they generate, are now said to be built on experience rather than advertising (Smith, 2003). Just as it is problematic to attribute religious loyalty to Apple exclusively to an image of the American way of life, it would be equally misleading to attribute the appeal of Japanese cosmetics in Asia exclusively to discursively constructed images of the country of origin. We have to look into the design and management of the experiential world in which brands engage consumers, and analyse the unequal distribution of a new set of skills and financial resources required for such an undertaking across the region; these skills and resources are available not to just any Japanese brand but only those brands under large multinational corporations.

This leads to my second argument against Japanisation: that it ignores decades of brand-driven economic exchange that have eroded national identification between brands and its owners. As if to further add to the already existing complexities that we have seen so far, Procter & Gamble,

the Cincinnati-based consumer goods giant, has been persistently mooted as a potential buyer for Shiseido, motivated not least by Shiseido's strength in Asian markets. The rest of Asia is also starting to seek instant access to wider markets through brand acquisition, as evidenced by the failed attempt of Sanjiu Qiye Jituan, the largest Chinese pharmaceutical company, to buy then-struggling Kanebo cosmetics in 2005 and the successful acquisition of IBM's ThinkPad and Jaguar and Land Rover by Lenovo and Tata Motors respectively. More attention to brands as such, alongside advertising and the disjunctive flows of media, is needed in order to address the great reorganisation in the power relationships in the Asian region that continues to mesmerise global marketers.

Notes

- ¹ This article is based on my ongoing PhD dissertation. Parts of the dissertation in which I discuss global distribution of brands, or 'brandscape', in greater detail have been published elsewhere (Oyama, 2009).
- ² In this article, East Asia refers to the affluent parts of East Asia including South Korea, parts of China, Taiwan and Hong Kong.
- ³ See reports by Kantei or the Prime Minister and His Cabinet (www.kantei.go.jp/jp/singi/titeki2/index.html).
- ⁴ See reports by the Ministry of Economics, Trade and Industry (www.meti.go.jp/policy/media_contents).
- ⁵ Data collected by the author between July 2006 and September 2008.
- ⁶ MAQUILLAGE was introduced in place of two preceding regional brands, Pienu and Praudia, in 2005.
- ⁷ Interviews with current and former brand marketers for most of the brands discussed in this article were conducted in November and December 2006.
- ⁸ Interviews with the publisher's international rights managers were conducted in November 2006.
- ⁹ The relationship between local adaptation and standardisation is a complex cultural and economic process that differs from market to market. In China, the sheer size of the advertising market means there is more local adaptation in *Ray* than in smaller markets such as Thailand or Taiwan to meet the demands of local advertisers.

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