

## “NO MORE UNCLE”: ASIAN MEN’S BEAUTY IN THE MARKETING SPOTLIGHT

Night cream, pore improvers, anti-aging serums, and cushion compacts are all familiar products in cosmetics. There is nothing new here until you find out who their big users are. No, it is not women but men, and not just young men but men of all ages. While the use of men’s skin and hair products has been on the rise globally, nowhere is this more pronounced than in Asia. Welcome to the glittering world of Asian men’s beauty or grooming<sup>1</sup>.

### Men Coming Out

The notion of men caring about their appearance has historically been a controversial subject matter. This stems from the hegemonic definitions of masculinity and the stigma against homosexuality that has long prevailed in many societies. As a result, many men have desired, but not been able to openly use, cosmetics.<sup>2</sup> It has long been established that men have literally been “in the closet” – using facial and hair care products in a clandestine fashion, often “stealing” or “borrowing” from their wives and girlfriends.

This is now changing as men are “coming out” in a broader sense to freely show that they care about how they look. Open-minded and accepting social attitudes about masculinity have paved the way for “metrosexuals” – heterosexual men who embrace effeminate displays such as earrings and hairbands as best embodied by football legend David Beckham in his heyday. Then came the “ubersexuals”, popularised by the book *The Future of Men*.<sup>3</sup>

*The descriptor 'uber' was chosen because it means the best, the greatest. Ubersexuals are the most attractive (not just physically), most dynamic, and most compelling men of their generations. They are confident, masculine, stylish, and committed to uncompromising quality in all areas of life... He doesn't care what people think. He's not worried that people think he's gay. He knows he's straight, and that's all that matters.*

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<sup>1</sup> Not to be confused with the use/connotation of the word “grooming” as the preying on younger sexual partners by older people. In Asia in particular, there is less usage of that negative sense.

<sup>2</sup> Matthew Hall, Brendan Gough, and Sarah Seymour-Smith, “I’m METRO, NOT Gay!: A Discursive Analysis of Men’s Accounts of Makeup Use on YouTube,” *The Journal of Men’s Studies*, 2012, 20 (3).

<sup>3</sup> Marian Salzman, Ira Matabia and Ann O’Reilly, *The Future of Men*, McMillan, <https://us.macmillan.com/thefutureofmen/mariansalzman/9781403975485/> accessed December 5, 2017.

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The posterchild for ubersexuals was George Clooney. He fitted all the attributes above and while he was seen as caring about women and their issues, he was undoubtedly a “guy’s guy”. Whereas metrosexuals tended to be more popular with women, ubersexuals were accepted equally by both men and women.

## Men's Beauty Industry

Once an afterthought to the women's beauty market, the size of the global men's beauty/grooming industry was estimated to be an impressive US\$ 21.4 billion in 2016.<sup>4</sup> This market, which included men's bath and shower, deodorant, skin and hair products, was expected to reach US\$ 60 billion by 2020, making it one of the fastest growing industries in consumer marketing.<sup>5</sup> The market was even larger if other related products and services, such as fashion or lifestyle stores, dermatological and orthodontic care, plastic surgery, spas and barbershops, were added. In contrast, men's toiletries that had traditionally focused on shaving razors, cream and aftershave care was expected to grow to US\$ 31 billion by 2020, but with far limited growth.<sup>6</sup>

Euromonitor predicted that the region of greatest growth for the global grooming industry would come from Asia Pacific.<sup>7</sup> If Asia's CAGR of 8.1% 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% between 2015 and 2020 (refer to **Exhibit 1**). For global cosmetic companies, this trend would have significant implications for planning for future growth, not only in terms of demographic segments (e.g., by gender and age) but also by region (e.g., shift to Asia).

### *Western versus Asian Men's Beauty*

Asian countries, perhaps with the exception of Japan, were latecomers to mass adoption of consumer products in general. A good example was the luxury market – whereas personal motivation drove the demand for luxury products and brands in the West, they were more symbols of social status for Asians. Thus Asian buyers typically sought brands that ostensibly signalled their position in society, mostly in order to be accepted by their peers.

Asian men were also late adopters of men's beauty products but ironically, their late arrival allowed them to leapfrog the slower and more conservative adoption by men in Western countries. The popularity of men's grooming and the growing number of “metrosexuals” in the West also made it acceptable for Asian men to express their individuality in a bolder way than before. But as with many technological innovations, notably the use of mobile technologies, Asians took the trend of men's grooming many steps further. As open discussion of sexuality was still limited in Asia as compared

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<sup>4</sup> HKTDC Research, “Asia-Pacific Surges Ahead as World's Leading Male Grooming Market,” December 20, 2016, <http://economists-pick-research.hktdc.com/business-news/article/International-Market-News/Asia-Pacific-Surges-Ahead-as-World-s-Leading-Male-Grooming-Market/imn/en/1/1X000000/1X0A8FBG.htm>, accessed December 26, 2017.

<sup>5</sup> Coresight Research, “Deep Dive: Global Male Grooming Market”, <https://www.funglobalretailtech.com/research/deep-dive-global-male-grooming-market/>, accessed December 6, 2017.

<sup>6</sup> Bhaskar Chakravorti, “Unilevers Big Strategic Bet on the Dollar Shave Club,” Harvard Business Review, July 28, 2016, <https://hbr.org/2016/07/unilevers-big-strategic-bet-on-the-dollar-shave-club>, accessed December 6, 2017.

<sup>7</sup> Coresight Research, “Deep Dive: Global Male Grooming Market”, <https://www.funglobalretailtech.com/research/deep-dive-global-male-grooming-market/>, accessed December 6, 2017.

to the West; grooming and fashion in Asia did not take on the connotation of one's sexual orientation. This also helped in the bold and quick adoption of men's grooming products.

The aesthetics for what constituted masculinity and good-grooming was also different. In the West, there was a tendency to equate manliness with rugged-looking men with facial hair.<sup>8</sup> This contrasted with Asia where "pretty boy" images were familiar and acceptable. Moreover, according to some marketing experts, Asian men's grooming was possibly about more than just wanting to look clean and good.

*The men who are driving the greatest worldwide growth in grooming and beauty products are those who feel liberated to celebrate their vanity and masculinity. They see attention to their appearance not in terms of problem-solving with immediate results, but as a long-term investment in identity and its public expression. These men are actively redefining what it means to be masculine.<sup>9</sup>*

The notion that Asian men could be more daring and even lead their Western counterparts in how men could manifest their masculinity was contrary to the common criticism that Hollywood often portrayed Asians in an emasculated way and was guilty of "whitewashing" in movies.<sup>10</sup>

Despite the regional trends, inter-country differences existed. For example, Kantal Worldpanel, a Spanish market research firm interviewed over 5,000 Asian men and found:

*Communicating messages about status and looking professional are likely to be the priorities in the Philippines, Vietnam and Malaysia. By contrast, in China, 73% of men pay attention to their appearance 'because women like it'.<sup>11</sup>*

In Southeast Asia, Halal-certified men's grooming products were spearheading the market in Indonesia, which was growing at 7 percent per annum.<sup>12</sup> So while common patterns might have existed in Asia, marketers ultimately needed to tweak the grooming products for individual markets.

### *South Korea as a Lead Market*

Within Asia, South Korea was the influencer or "lead" market in men's beauty, even as China had higher sales and growth.<sup>13</sup> The South Korean 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. The average Korean man used about 13 cosmetic products on a monthly basis.

The concept of a "lead" market was quite similar to that of opinion leadership.<sup>14</sup> An influencer could have scores of followers, especially through social media. In the UK for instance, David Beckham

<sup>8</sup> L.S. McNeill and K. Douglas, "Retailing masculinity: Gender Expectations and Social Image of Male Grooming Products in New Zealand," *Journal of Retailing and Consumer Services*, 2015, 18 (5).

<sup>9</sup> Kathryn Sloane and Benjamin Chong, "Men's Beauty Goes Big in Asia," *Beauty Packaging*, February 18, 2016, [https://www.beautypackaging.com/contents/view\\_online-exclusives/2016-02-18/mens-beauty-goes-big-in-asia/](https://www.beautypackaging.com/contents/view_online-exclusives/2016-02-18/mens-beauty-goes-big-in-asia/), accessed December 8, 2017.

<sup>10</sup> David Yi, "Where the Fierce Asians At?" *Mashable*, <http://mashable.com/2016/06/19/hollywood-asian-americans/#hdKcvpFUizq1>, accessed December 6, 2017.

<sup>11</sup> HKTDC, op cit.

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

<sup>14</sup> Dae Ryun Chang, "Mastering Noon Nopi: The Art & Science of Marketing in Asia," Yonsei University Press, 2015.

was an icon on fashion and grooming for many of his fans. In a similar way, a country, even a relatively small one, could influence lifestyle trends in other neighbouring countries. South Korea had been riding the cultural popularity wave (called "Hallyu" in Korean) since 1999 thanks to its soap operas (called "K-Drama"), pop music (called "K-Pop") and women's beauty products (called "K-Beauty").<sup>15</sup> The three areas often overlapped through celebrity endorsements. For example, a popular Korean actor, Lee Minho, starred in many soap operas and had huge billboards placed in Singapore for companies such as LG and Tangs department store (refer to **Exhibit 2**).

The explosive debut of the boy band BTS also drew new interest in the West. They already had a reputation throughout Asia for being a top group not only because of their music, dancing, and social consciousness of their songs, but also their fashion style.<sup>16</sup> They were just the latest in a long string of boy bands who had pushed the boundaries of the aesthetics of male masculinity. The fact that they used once-tabooed items such as eye pencils and lip products allowed non-celebrity men to follow suit.

For K-Beauty, the reference point was Korean women – not only celebrities in K-Drama or K-Pop, but also fashion-conscious segments such as the "Gold Misses" (high-flying women who had opted for a career instead of marriage).<sup>17</sup> As men's grooming in Korea was expanding, the influence of not only Korean male icons like G-Dragon of the group Big Bang but also Korean "Gold Mistresses" might have influenced their followers at home as well as in their follower countries like China.<sup>18</sup> Therefore, it behoves grooming companies to monitor the user trends in this epicentre not only to succeed there but also in countries where its ripple effects ultimately reach.

From a sociological standpoint, marketers could also analyse the drivers of the demand for men's beauty products in Korea. If similar fundamentals existed in the follower countries, then predictions about those markets would become that much more confident. Many reasons could exist but ultimately it revolved around one key word, "hypercompetition."

In Korea, from the day they were born, people have to compete almost to the point of survival. This was especially true for education where children were taught not only in regular schools but also in cram schools from an early age to prepare for university.<sup>19</sup> That sense of extreme competition extended itself to meeting the opposite sex, getting a job, and looking good. In a way, they all morphed together into one big arena for survival. As one male interviewee in a Washington Post report on Korea stated:

*Korean society is very competitive, and for young men to improve their career chances and find a girlfriend, looking good helps their competitiveness.*<sup>20</sup>

<sup>15</sup> Martin Roll, "Korean Wave (Hallyu) – The Rise of Korea's Cultural Economy & Pop Culture" <https://martinroll.com/resources/articles/asia/korean-wave-hallyu-the-rise-of-koreas-cultural-economy-pop-culture/>, accessed Aug. 1, 2018.

<sup>16</sup> Christy Cheung, "Why is K-pop So Popular in Hong Kong?" Young Post, April 5, 2017, <http://yp.scmp.com/entertainment/music/article/105959/why-k-pop-so-popular-hong-kong>, accessed Dec. 9, 2017.

<sup>17</sup> Dae Ryun Chang and Kevin Sproule, "Gold Misses in South Korea: Icons in Marketing to Gangnam," Singapore Management University Case No. 12-0044, January 2011.

<sup>18</sup> Elizabeth Peng, "G-Dragon, the Undisputed King of K-Pop, Takes New York" Vogue, July 31, 2017, <https://www.vogue.com/article/g-dragon-act-3>, accessed Dec. 10, 2017.

<sup>19</sup> Se-won Koo, "An Assault Upon Our Children," The New York Times, August 1, 2014, [https://www.nytimes.com/2014/08/02/opinion/sunday/south-koreas-education-system-hurts-students.html?\\_r=0](https://www.nytimes.com/2014/08/02/opinion/sunday/south-koreas-education-system-hurts-students.html?_r=0), accessed Dec. 11, 2017.

<sup>20</sup> Anna Fifield, "In South Korea, Beauty is Skin Deep (Just Make Sure to Pierce the Stubble)" The Washington Post, May 10, 2015, [https://www.washingtonpost.com/world/asia\\_pacific/in-south-korea-beauty-is-skin-deep-just-make-sure-to-pierce-the-stubble/2015/05/10/4779f642-f354-11e4-bca5-21b51bbdf93e\\_story.html?utm\\_term=.241fa728824e](https://www.washingtonpost.com/world/asia_pacific/in-south-korea-beauty-is-skin-deep-just-make-sure-to-pierce-the-stubble/2015/05/10/4779f642-f354-11e4-bca5-21b51bbdf93e_story.html?utm_term=.241fa728824e), accessed Dec. 12, 2017.

The intense competition led to an inconvenient truth and practice that was backed up by statistics – Korea had the highest number of plastic surgeries among the OECD countries (20 per 1,000), clearly outpacing the US in second place (13 per 1,000).<sup>21</sup> Because Korea was ethnically homogeneous, the competition to look good became more intense than in racially diverse cultures. This was especially so in greater Seoul where almost half of South Koreans lived, and which had the sixth highest population density in the world. A plastic surgeon interviewed by Business Insider explained:

*So you are confronted with people's images all the time...It's widely agreed that people who look better have an advantage in the job market, especially since your photo is included in your résumé for most jobs.*<sup>22</sup>

Another reason was the need to look young. In contrast to the Confucian cultural principle that revered the aged, modern times revealed a decided preference for youth. In the same Washington Post report, Eric Min, deputy editor-in-chief at Luel, a men's magazine, put it bluntly:

*In South Korea, being young and active are considered very attractive qualities. Youth equals ability.*

Trends in men's grooming in Korea could be used to predict future demand patterns for follower countries.<sup>23</sup> In addition to the many types of cosmetics items bought and used, Korean men also used a greater variety of products and services such as mask packs, facial peels, dermatologists, and cosmetic surgery. As for the main purchase channels, the primary ones were drugstores, online open markets, and one brand shops. As to who or what influenced purchases, the major ones were online product information, advice from wives or girlfriends, friends, and online user reviews. The online channels provided a convenient channel for millennials who were often too busy to shop offline.

Moreover, since online shopping allowed for research on new products, price comparisons, and user reviews, the digital space offered a one-stop solution to customers. They could also avoid face-to-face contact, and buy potentially embarrassing products without the glare of onlookers. The most preferred brands were Biotherm (for both 20s and 30s), Innisfree (for 20s), Ulos (for 30s), Lab Series and Skinfood (for 20s) and Innisfree and Lab Series (for 30s). Broadly speaking, foreign brands and domestic brands were equally popular with slight differences across age groups.

### *Notable Brands in Men's Beauty*

One of the biggest names in Asian Beauty was AmorePacific from South Korea, which was the corporate brand for individual lines such as AmorePacific, Sulhwaso, Hera, IOPE, Laneige and Innisfree. Their dominance in Korea had been longstanding since 1954 but their presence abroad, especially in Asia, had grown, and they hoped to increase their overseas portion of total sales to China and Southeast Asia (about 18% in 2015) up to 50% by 2020.<sup>24</sup> Many Korean men served a 20-month long period of mandatory military duty, during which they used several skin products such as sunblock, camouflage cream and facial cleansers. Many of these products were AmorePacific brands,

<sup>21</sup> Drake Baer, "Why Korea is the Plastic Surgery Capital of the World," Business Insider, September 22, 2015, <http://www.businessinsider.com/south-korea-is-the-plastic-surgery-capital-of-the-world-2015-9/>, accessed Dec. 11, 2017.

<sup>22</sup> Ibid.

<sup>23</sup> Open Survey, "Men's Grooming Trend Report 2017," (in Korean) 2017, <https://www.opensurvey.co.kr/blog/trendreport/grooming-trend-report-2017/>, accessed December 6, 2017.

<sup>24</sup> Andrew Salmon, "Company Rides the Wave," <https://asia.nikkei.com/Business/Cosmetics-company-rides-the-wave>, accessed Aug. 1, 2018.

such as the Innisfree cleanser. What was noteworthy about male cosmetic brands was that while some had been developed specifically for men (e.g., Odyssey), others were extensions of established women's lines (e.g., Innisfree, Hera, IOPE). These products were most often purchased by women for their husbands, boyfriends or brothers, and their experience and satisfaction with similar women's products was a common cited reason.<sup>25</sup> For example, a popular "new" product for men was the IOPE Air Cushion Compact. The idea of men using a foundation compact may have been quite jarring in the past, but over time it was becoming more common, at least in Korea.

Another player in Asian men's grooming was L'Oreal, which owned brands such as Biotherm Homme, Kiehl's, and L'Oreal Men Expert. L'Oreal also collaborated with other brands such as Philips to create a grooming experience for customers by having pop-up stores in places such as Changi Airport in Singapore.<sup>26</sup> Travellers received grooming advice from professional experts on skincare and shaving products that best catered to their needs. Customers were exposed to and got first-hand experience of Philips' top-of-the-line shavers/trimmers and L'Oreal's Men Expert skincare products, which they could carry back home and spread the word about. In some Asian countries like India, having facial hair was becoming more the norm and Philips tweaked its marketing campaign by promoting a well-trimmed (as opposed to clean shaven) look by using handsome bearded Bollywood actor Arjun Kapoor as their brand ambassador. According to Philips India President of Consumer Lifestyle, Ada Ratnam,

*Kapoor personifies... everything that Philips Male Grooming stands for – youth, style and confidence. Who better than him to endorse the male grooming product range that is designed to give the youth the power to be style icons in themselves?*<sup>27</sup>

In addition to the traditional brick and mortar stores, several start-ups were also targeting the millennials, who were busy and accustomed to ordering products online.<sup>28</sup> Harry's was a U.S. barbershop that also offered shaving and lifestyle products online. Such a hybrid business model allowed customers to receive customised recommendations from their barbers on products that they could purchase both online and offline. The offline interaction built rapport and loyalty with the barber and to the brand. By 2016, the company was reported to have over two million customers. Another subscription-based company was The Man Company based in India. Their price range was more suited to the Indian market (US\$ 9~10) and users could customise the basket of goods that best suited them individually.

## New Market Segments

Besides the classic "metrosexual" and "ubersexual" customer segments, men's grooming businesses were tapping into other market opportunities: "NOMU," "JOOBAEK" and "YUMMY." NOMU was short 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.<sup>29</sup> Whereas before, NOMUs attempted to be

<sup>25</sup> Beauty Economy, "IOPE Men Cushion Popular Among Women," (in Korean) <http://www.thebk.co.kr/news/articleView.html?idxno=167661>, accessed December 12, 2017.

<sup>26</sup> Deep Dive.

<sup>27</sup> E-Times, "Arjun Kapoor Launches Philips Pro Skin Advance Trimmers in Mumbai," July 20, 2014, <https://timesofindia.indiatimes.com/entertainment/events/mumbai/Arjun-Kapoor-launches-Philips-Pro-Skin-Advance-Trimmers-in-Mumbai/articleshow/38485646.cms>, accessed December 11, 2017.

<sup>28</sup> Ibid.

<sup>29</sup> JTBC, "To Create My Man: No More Uncle," (in Korean) June 14, 2014, [http://news.jtbc.joins.com/article/article.aspx?news\\_id=NB10497839](http://news.jtbc.joins.com/article/article.aspx?news_id=NB10497839), accessed Dec. 9, 2017.

trendy just with clothing, by the turn of the century they were turning more and more to grooming. They used skincare products and went to facial spas, where demand by men had increased over 30% between 2012 to 2014, as CEO Lee Mi-na of SPA the El explained,

*Men in their 40s and 50s invest aggressively in terms of time or money. They seem to be proud of hearing that they look younger and being asked how they rejuvenated themselves. As such, once they start to get facial treatments, their response is very good.<sup>30</sup>*

MK magazine, a major Korean daily, offered the following checklist to gauge whether one was a NOMU (must answer "yes" to five or more items to be classified as NOMU):<sup>31</sup>

1. *I care about my looks.*
2. *Having an interest on many different things 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 an 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 represented Asian males with the new attitudes that it was now okay to be self-indulgent. Unlike the past when they passively wore what their girlfriends or wives bought them, more and more men shopped alone to discover what pleased them and helped them to be more individualistic. Magazines like Luel targeted such men with articles and sponsored ads on good living. 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 had 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.<sup>32</sup> They had very exclusive tastes for restaurants, cars, fashion, watches and grooming. The rise of YUMMY, in Korea at least, appeared to be in part a reaction to the rise of the Gold Misses. Many of the descriptors of YUMMY were consistent with the Gold Misses, who had been iconic to Korean marketers and their legions of followers.<sup>33</sup> YUMMY were also young, single and often lived alone but, unlike the previous generation of men, took good care of their faces and bodies. Spurred on by television shows showcasing sexy male chefs, they relished learning about and cooking haute cuisine

<sup>30</sup> Bizline, "Men in their 40s and 50s Moving the Consumer Market," Arirang Issue, October 23, 2014, <https://www.youtube.com/watch?v=2Kj9JX3GvAE>, accessed Dec. 7, 2017.

<sup>31</sup> M Magazine, "Here Come the NOMU: Men in Their 50s with Tastes of 20-30 Year Olds," (in Korean) February 24, 2012, <http://mzine.mk.co.kr/v2/index.php?TM=M3&RC=119>, accessed Dec. 11, 2017.

<sup>32</sup> The Guardian, "YUMMIES: Young Urban Males Obsessed with Personal Grooming and Health," March 30, 2014, <https://www.theguardian.com/uk-news/shortcuts/2014/mar/30/yummies-young-urban-males-personal-grooming>, accessed Dec. 10, 2017.

<sup>33</sup> Dae Ryun Chang and Kevin Sproule, "Gold Misses in South Korea: Icons in Marketing to Gangnam," Singapore Management University Case No. 12-0044, January 2011.

for themselves and friends.<sup>34,35</sup> They drove the demand for expensive grooming products such as anti-aging serums, pore management products and fragrances. As part of their need to be pampered as men, their havens of choice were high-end barbershops.

## A New-Old Service: Barbershops

Often success in marketing can be achieved by making something old into something new. The rise of the men's grooming market has led to the reintroduction of the traditional barbershop, albeit with a twist. Barbershops in the past were where men went to get shaved and get a haircut – plain and simple. In recent times, metrosexuals also started to frequent hair salons, but to get much more than a simple shave or trim, they were looking to get a perm, highlights, or a more demanding hair style. All of this spelled the demise of old-style barber shops.

Starting in the UK and the US, barbershops were making a comeback by reinventing themselves.<sup>36</sup> One could still get a shave and a haircut but oh, also so much more. Barbershops transformed themselves into full-service beauty salons offering customised grooming to match one's face type, hair and even profession. A typical sitting began with a consultation about skin and hair and, to put the customer in a relaxed mood, at some places, a glass of single-malt scotch whiskey. It could even include tips on fashion and eating, making it a total lifestyle shopping experience.

One of the notable barbershops in Seoul, with branches in Hong Kong, was HERR. It was started by an investment banker, Sang-yoon Lee who worked at Goldman Sachs.<sup>37</sup> The word 'HERR' was German, and meant "Mister" or "Lord." It was a distinctively male descriptor to clearly communicate that at this establishment men will be only with other men. The homepage communicated these attributes in no uncertain terms. One of the interesting male bonding offerings was a joint father and son cut where two generations of a family could receive a discount when they shared the HERR experience. One of HERR's barbershops was located in Lotte Department Store, inside a fashion store Club Monaco, making it a truly total lifestyle one-stop location. Wives and girlfriends were known to conspire and bring their "unsuspecting guys" to HERR for a makeover but they themselves made sure not to linger around.

Lee, when working at Goldman Sachs in New York, enjoyed his downtime grooming at the Freeman Sporting Club. It is there that he hatched the idea to launch Herr in Korea. Lee said:

*What was so special about the experience was being able to spend time around other men. There are customers who go to a barbershop every 10 days, and these customers really feel a sense of community and belonging. It's in this kind of space that men can talk about their personal life, how they would like to look, personal problems, etc. I really loved that experience, and wanted to recreate that in Seoul. We encourage our barbers to build a true*

<sup>34</sup> Anne Fifield, "In Korea a New Ingredient for TV Cooking Shows: Men," The Washington Post, October 17, 2015, [https://www.washingtonpost.com/world/asia\\_pacific/in-korea-a-new-ingredient-for-tv-cooking-shows-men/2015/10/17/93983ce4-00e6-4ea4-a9d2-626afcdc6d7d\\_story.html?utm\\_term=.bbbebc00e359](https://www.washingtonpost.com/world/asia_pacific/in-korea-a-new-ingredient-for-tv-cooking-shows-men/2015/10/17/93983ce4-00e6-4ea4-a9d2-626afcdc6d7d_story.html?utm_term=.bbbebc00e359), accessed Dec. 12, 2017.

<sup>35</sup> Euronews, "South Korea's Food Goes Global," May 9, 2011, <http://www.euronews.com/2011/09/05/south-korea-s-food-goes-global>, accessed Dec. 24, 2017.

<sup>36</sup> Kyle Haggerty, "Barbershops are Back and Bucking Retail Trends," Forbes, July 6, 2017, <https://www.forbes.com/sites/bisnow/2017/07/06/barbershops-are-back-and-bucking-retail-trends/#5ff0afc03fe9>, accessed Dec. 7, 2017.

<sup>37</sup> Daniel Kong, "How Hong Kong's First Korean Barber Adapted the Male Grooming Experience to Asian Hair and Needs," South China Morning Post, April 12, 2017, <http://www.scmp.com/lifestyle/fashion-luxury/article/2085428/how-hong-kongs-first-korean-barber-adapted-male-grooming>, accessed Dec. 8, 2017.

*friendship with all their clients. Sometimes you need a guy who listens to you. Sometimes you need a guy who will give you a pep talk. So we really emphasise to our barbers to be the guy that's there all the time.*<sup>38</sup>

The community and “chatty” aspect of a barbershop for men may be something from the past, but it had found new life in an updated and localised form to appeal to modern Asian men. The “Asianisation” of the barbershop by Lee had been to position it at the high-end and to offer grooming services like shampooing that men had come to expect in Asia but not elsewhere. Also add-ons such as single-malt Scotch whiskeys had created the exclusive image that HERR had strived to achieve. Another emerging need was men's fragrances and while this was on limited offering at HERR, other lifestyle stores such as Project Rue in Gangnam had enticed men to invest in designing/mixing scents customised to their character (refer to **Exhibit 3**). “Gangnam Style,” at least in Korea, symbolised a trendsetter and not the viral video.<sup>39</sup>

HERR's barbers won the loyalty of well-placed clients and many of them became world-famous barbers, such as Master barber Kwon Young-woo at the Four Seasons Hotel branch. Some moved out of Seoul to work abroad, for instance to join London's Taylor of Bond Street.

## Other Dimensions

Men's grooming, especially in Asia, was a hot market. But hot markets generally do not remain hot and so, marketers have had to make sure they could sustain their success beyond the original target sales and markets. Furthermore, these businesses faced key challenges that could also act as opportunities.

### *Technology*

Technology was the 800-pound gorilla that was wreaking havoc on all businesses and the beauty industry was no exception. Technological advances can threaten any industry unless proactively leveraged. With women's beauty, this was already happening at companies such as L'Oreal.<sup>40</sup> Information technology innovations included smartphone apps with which users could simulate the application of different make-up products to see how their appearance may change, and a vlogger competition on Instagram where users posted their proposals for various makeup artistry challenges. The company also connected users with skin problems to the right products or even dermatologists via live online chats. Since the women's beauty industry was much bigger than that of men's grooming, these developments and offerings were scalable and therefore profitable. For men, these technology-driven opportunities provided a roadmap for future needs and solutions.

### *Cross-country Demand*

Although men's grooming was a global phenomenon, there were some clear differences in the demand for specific grooming products and services between regions and countries. South Korea

<sup>38</sup> Ibid.

<sup>39</sup> Dae Ryun Chang, “Marketing Gangnam Style,” Harvard Business Review, September 20, 2012, <https://hbr.org/2012/09/marketing-gangnam-style>, accessed Dec. 8, 2017

<sup>40</sup> Sophie Curtis, “L'Oréal: How Technology is Transforming Beauty,” The Telegraph, July 18, 2015, <http://www.telegraph.co.uk/technology/news/11744292/L'Oreal-How-technology-is-transforming-beauty.html>, accessed Dec. 9, 2017.

was a “lead” market in Asia whereas the UK could be considered so for Europe, Brexit notwithstanding. Grooming companies needed to discover the “next” Korea or the “next” UK as these niche markets could portend much larger ones in the future. The cross-country fertilisation of style often occurred, in some cases unexpectedly, with media exposure. Such phenomena date all the way back to Elvis Presley and Michael Jackson and their stylistic influences the world-over. The K-Pop band BTS’ appearance on the Ellen DeGeneres’ talk show may possibly have triggered an interest in their “style” among North American men, in addition to their existing influence in Asia.<sup>41</sup>

### *Cross-industry Demand*

Men’s grooming was just one part of a much larger category of men’s living or men’s lifestyle. To some extent, growth would also depend on how well this sub-category could collaborate with other sub-categories such as fashion, food, alcohol, wellness, leisure, travel, automobiles, accessories, and so on. The relationship between these markets could be seen in men’s living or lifestyle magazines where there was a “pairing” of the different products in the photos. Some of these magazines had sections on grooming where they provided tips and information about new products. One example of a tie-in campaign was when HERR barbershop allowed Timberland to prominently display their new products at their Hannam store. This appealed to the younger clientele. An extreme example of a crossover innovation was a line of beer grooming products launched by Carlsberg. Given the popularity of beer drinking among men, Carlsberg was betting that beer could be as popular when used on hair, face and skin. Besides HERR and Carlsberg, there existed many more obvious and not-so-obvious possibilities for new cross industry grooming products and retail innovations, as well as co-branding opportunities.

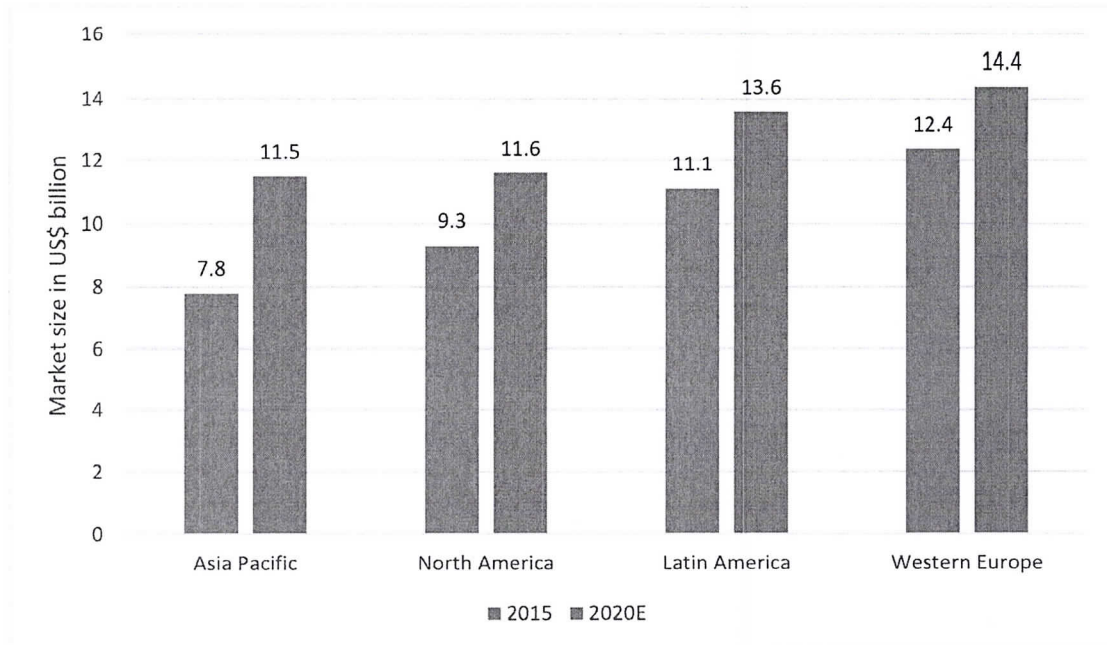
### **Noon Nopi: The Marketing Challenge**

Trends and preferences in men’s grooming in Asia yet again provided evidence that Asia had not conformed to marketing stereotypes. Thus, companies would need to adjust their “Noon Nopi” (literally means “eye level” in Korean but can be a metaphor for the need to have a correct and evolving consumer viewpoint) on this increasingly important market.<sup>42</sup>

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<sup>41</sup> MTV, “BTS Give Debut Performance of 'MIC Drop' On The Ellen Show,” November 28, 2017, <http://www.mtv.co.uk/bts/news/bts-give-debut-performance-of-mic-drop-on-the-ellen-show#>, accessed Dec. 7, 2017.

<sup>42</sup> Dae Ryun Chang, “Mastering Noon Nopi: The Art & Science of Marketing in Asia”, 2015, Yonsei University Press.

**EXHIBIT 1: MALE BEAUTY MARKET SIZE, BY REGION**

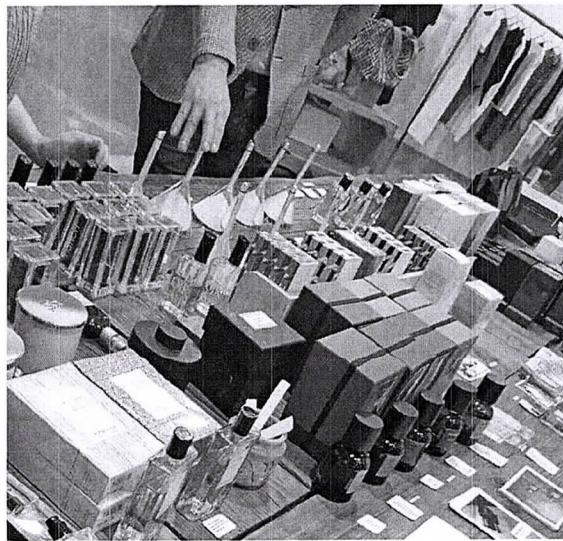
Source: Euromonitor, "Beauty and Personal Care Global Industry Overview," June 2017, <https://www.euromonitor.com/beauty-and-personal-care-global-industry-overview/report>

**EXHIBIT 2: POPULAR K-DRAMA ACTOR LEE MINHO**



Source: Wikipedia, "Lee Minho", [https://upload.wikimedia.org/wikipedia/commons/a/a5/Lee\\_Minho\\_LG.jpg](https://upload.wikimedia.org/wikipedia/commons/a/a5/Lee_Minho_LG.jpg)

**EXHIBIT 3: FRAGRANCE TESTERS FOR MEN AT PROJECT RUE IN GANGNAM, SEOUL**



Source: Photo by author at PROJECT RUE