Cosmetic Differences

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Rosalynn Tang looks at the implications of our Return of the Product study for Chinese and Japanese brand owners.

Brands may increasingly be the same all over the world but the ways people relate to those brands can dramatically differ. Are brands more important as private talismans or as display objects? Do customers simply want a brand they can trust, or one that cares for them too? Get it wrong and you could alienate your audience.

Research Internationalâ€™s Return of the Product study asked 1200 people in 43 countries about the intense relationships they form with brands. This global qualitative study uncovered four basic modes of consumer/brand relationships, each satisfying different needs. The mode of relationship people form with brands tends to vary according to culture, lifestage and product or service category.

The first mode is security, where the brand acts as a guarantor of product performance. In the second mode, affiliation, the brand is a badge of belonging to a particular group or social class. The third mode, expression, finds the brand being used for individual self-expression and in the fourth mode, experience, the brand is a private amplifier of the product experience.

The study found that in many Western markets this fourth mode is growing in importance, with more people seeking an internalised, intense product experience from their brands. But what about markets in Asia Pacific? How do people there relate to the brands they use? In this article weâ€™ll examine China and Japan, first of all considering how the modal structure applies in these markets, and then looking at a recent quantitative study of cosmetics users.

First of all itâ€™s important to note that the four different modes of consumer/brand relationship are found in all cultures. Lifestage, product category and brand marketing play important roles in influencing which mode a particular relationship settles into. But the four modes do find â€˜centres of gravityâ€™ in particular markets, where the cultural norms of a society help give rise to the needs which a mode fulfils. So, for instance, a market with a rigidly hierarchical society may find its consumers relating to brands in the affiliation mode more often than in the less socially-rooted experience mode.

So where are the â€˜centres of gravityâ€™ for China and Japan? First of all we must make a distinction between the larger Chinese cities and the third-tier and rural areas of China, which show different attitudes to brands. For example, as Gilbert Lee discussed in a previous edition of The Issue*, global companies in the mobile phone sector have pitched their marketing in China towards a status-conscious, aspirational audience. But this only works in the larger cities â€“ in other parts of the country many consumers buy local brands which come recommended by salesmen face-to-face.

This is because in larger cities the affiliation mode â€“ based on brands as a badge of status â€“ is most common, but in rural areas and third-tier cities consumers often operate in the security mode. Word of mouth is fundamental for this consumer segment as it lends brands the authority needed to create strong relationships in this mode. Brand owners should try to create brand advocates that will help promote and push the brand.

The affiliation mode is important in Japan as well as China, but many Japanese consumers also operate in the expression mode. Both of these modes relate to how the brand is used in a social environment, but there is a key difference between them. Research Internationalâ€™s Kazuko Ohye has written2 about the early 00s shift in Japanese consumer attitudes from a â€˜me tooâ€™ culture, where everyone felt they had to have the latest brands, to a â€˜me-onlyâ€™ culture, where individuals choose the brands that they best feel reflect their own values and personalities. â€œI wish I could find the one and only product, because then I would be the only oneâ€•, said one Japanese consumer. This in a nutshell is the difference between an affiliation mode relationship, where brand choice has a meaning that can be understood by everybody, and an expression mode relationship, where brand choice is an act of individuality, intended only for friends or a peer group.

At the same time as we were running the Return of the Product study, Javier Culva and Goutam Mitra conducted a quantitative study into cosmetics brands in Japan and in larger Chinese cities.3 This study used our Equity Enginesm proprietary tool, which measures brand equity within a market and also breaks down what is driving that equity. Every market is driven by a combination of functional and emotional factors â€“ how well the product performs, and the irrational associations the brand might carry. The Equity Enginesm tool assigns weights to each of these factors.

For both the Chinese and Japanese cosmetic markets emotional factors slightly outweighed functional factors as drivers of brand equity. In both markets the major functional criteria were that the cosmetics moisturised well and that they looked natural. In Japan their suitability for everyday use was also a factor. None of this is very surprising, but when we look at the emotional factors that drive equity we see more intriguing differences between markets. In China, the single biggest determinant of equity was whether the brand was seen as a good choice by others. In Japan, it was whether the consumer felt personally comfortable with the brand.

This is precisely what we would expect to see from the Return of the Product study, with urban Chinese consumers forming affiliation-mode relationships with brands while their Japanese counterparts are more likely to form expression-mode bonds. When we look at the specific brands that emerge with high equity among consumers we can see how this works in practice. In China the most-favoured brands were Maybelline and Lâ€™Oreal â€“ global names. In Japan, though, local brands like Shiseido and Kanebo performed best with Lâ€™Oreal in particular being poorly perceived.

So among urban Chinese the cosmetics market seems to be an aspirational one whereas consumers in Japan see their cosmetics as a means to express a specifically Japanese identity. Our cosmetics study suggested that this reflected differing attitudes to the idea of beauty â€“ in China beauty is something perceived by others; in Japan beauty is something innate and internal that can be expressed. These insights clearly have strong practical implications for how brands are communicated in these markets.

The four modes of consumer/brand relationship do not in themselves explain how to market specific brands but they provide a broad framework for research and marketing efforts. For instance, a marketer may be aware of the importance of affiliation-mode relationships in urban China. They can then look out for patterns in their data which suggest how these relationships are being created and expressed by consumers. They can also analyse competitor communications in the light of the modal framework and can adjust their own communications accordingly.

And finally, what of the experience mode, which the Return of the Product study concludes is becoming dominant in Western markets? Might it find more than a foothold in Asia? The answer is â€“ possibly. The highly individualised expression mode has already become common in markets like Japan and Hong Kong. This mode is still concerned with a brandâ€™s social potential, but the study suggests that it is easy for consumers in this mode to also enter the experience mode, where an intense and private product experience becomes the main focus of branding. This may yet happen in the Asian markets, but until then the social modes will remain the dominant ones for sophisticated consumers in the region.

* The Shopping Issue, Research International, 2004

2 The Global Brands Issue, Research International, 2002

3 The brands featured in the study included Lâ€™Oreal, Maybelline and Shiseido in both China and Japan; Yue-Sai and Chen Ming Ming in China only; and Kanebo and Kose in Japan only.