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Get the London Look:

**The Geographies of London-Based Beauty
Brands and Branding in Response to Social
and Cultural Change**

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Abstract

Previously under-investigated and often misunderstood, the geographies of brands and branding is a key area within social, cultural, and economic geography. Brands are increasingly utilising their locational origin to differentiate themselves within the global landscape. The beauty industry is a key example of how global brands employ origin cues throughout certain aspects of their branding, binding and maintaining meaning and value in spatial circuits. The beauty industry's roots of global colonial expansion and imperialism spreading whiteness as the marker of beauty is understood and explored in relation to branding geographies. Through a triangulation of in-depth interviews, document analysis and previous literature, this research understands how London has been illustrated within the branding, the extent to which the socio-cultural diversity of the city has been identified and represented, and the future for these London-branded brands. Situating the research on London, this city-level lens addresses gaps in previous discourse on the 'made in' effect often analysing purely the national or regional level. The research identifies how the geographies of London-based beauty brands, and their locational associations are both fixed and temporary in time and space because of specific actors within the beauty landscape. The research offers a contribution to further exploration of the intersection between socio-cultural and economic geography and provides further conceptual clarity and theorisation of the topic.

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1.1 Research Context

This dissertation will examine how specific associations and meanings are attached to three London-based beauty brands through the geographic location of their branding. The research will question whether these London-based beauty brands can continue to define themselves with a geographic location in a globalised industry that does not overtly correlate with the brand identity. Rooting all the research above is the idea of representation; representation of the city, of the socio-cultural diversity of its inhabitants, and of the ever-evolving beauty trends and cultures that these brands originate themselves. Are the diversity and inclusivity evident in London today showcased within the brand and its branding?

This exploration draws on and furthers Andy Pike's 2015 research, 'Origination: The Geographies of Brands and Branding'. This provided one of the first theoretical and conceptual frameworks for understanding the role of spaces and places in brands and branding. As geographically originated brands globally intersect and overlap, the spatial associations are constructed and organised by multiple actors involved. This concept of 'origination' (Pike, 2015) moves previous discourse beyond the 'made in' effect shaping brand perceptions and towards a 'post-country of origin' concept (Varman and Costa, 2013), with a specific focus on perspectives other than the global and national towards local, city-level lenses. Rooting this research within London, a city with embedded connotations of "authenticity, quality and tradition" (Goodrum, 2005; McDermott, 2002; McRobbie, 1998; Pike, 2015 p.113), yet also modernity, diversity and representation, this research will understand whether Pike's geographical narrative of brands being both "bound and unbound, fluid and fixed, real and imagined" (Kipnis, 2015 p.601) is evident within the branding of London-based beauty brands.

American economist Richard Florida concluded that the global economy was more "spiky" than "flat" after examining the concentration of economic strength, innovation, and creativity in a handful of the world's cities and regions (Jones, 2011 p.301). London's dominance as a global spike on the geographic map of the beauty industry is arguably inescapably related to British colonial expansion and imperialism during the 19th and 20th centuries. This projection of Western beauty standards onto other social groups and geographic settings caused the subjugation of 'other' cultural beauty ideals. The global expansion of the beauty industry and its subsequent imposition of white, Western looks fosters ongoing research regarding the overwhelming "homogenisation of cultures" (Jones, 2011 p.7) within brands and branding as a direct result of globalisation. The manufacture and propagation of certain Western notions of beauty by the industry offer a crucial understanding of the socio-cultural impact of globalisation.

Indeed, London reflects a 'geography of cool' (The Economist, 2000), shaped by waves of socio-cultural history, and the ethnic mix of certain London boroughs has produced a "sense of edginess and roughness" (ibid, para. 8) to the London image. This has often been portrayed through the branding practices of beauty brands, most noticeably Rimmel London with their Scandal Eyes mascara launch and a leather-clad Kate Moss motorbike riding through the streets of London. London's beauty standard has unquestionably become diversified and ever-evolving, representative of its rich ethnic and cultural mix, and the beauty and health industry in the UK has

been valued at £26.7bn in 2022 (John, 2022). Yet in terms of diversity and inclusion for Black, Asian and minority ethnic (BAME) profiles, who spend around £230m each month on beauty globally (Wolfe, 2022), the beauty industry is arguably still lacking behind. The Black Pound Report 2022 reported that BAME consumers needed to spend 25% more on beauty products, and 22% needed to purchase from specialist shops (Amoah, 2022). The extent to which London-based brands have increased their ethnic and racial representation will be explored in the following analysis.

The branding of London-based beauty brands is unquestionably ever-evolving due to the socio-cultural diversity of the locality. This research examines the extent to which globalisation is seeming to diffuse 'other' local beauty cultures and ideals alongside the continuing homogenisation of beauty in London. Adding to the previously "under-researched and unevenly recognised" (Pike, 2011 p.9) geographical phenomena of brands and branding, the following sections surmise how beauty brands have reacted to evolving and complex socio-cultural changes in London that are imbued with geographical associations.

1.2 Research Importance

This research aims to understand the relationship between socio-cultural change in London and the complexity of branding choices used by actors within the brands' circuits of design, production, and consumption. Can these London-based beauty brands continue to brand themselves with a London origin, despite the continuous socio-economic changes that have occurred over the past decade? Importantly, is the geographically located London lifestyle they have continually portrayed in their branding the same London that is evident now?

Analysing the geographical entanglements between social and cultural change and the geographies of brands and branding dispels previous research portraying branding as "spaceless concepts" (Lee, 2002 p.334) lacking geographical grounding. Moreover, this research aims to provide further spatial dimensions to the research on brands and branding that is previously strongly marketing based. This has tended to focus on the national level rather than acknowledging the more focused spatial dimensions of city-based brands and branding. Linking these insights of beauty brands and branding across geography can enhance understanding beyond the single sub-discipline of marketing towards a more nuanced and authoritative account.

1.3 Research Questions

1. How has London been branded by beauty brands to reflect the city?
2. Who is the London beauty consumer and are they represented in the branding?
3. How are London-based beauty brands competing on a global scale?

1.4 Aims

To apply geographical understanding to the past, current, and future objectives of London-based beauty brands as they continually respond to both local and global socio-cultural changes. This will enable one to understand what is the 'London

beauty consumer' being portrayed versus reality and uncover what is the future of these London-based beauty brands.

1.5 Objectives

- To understand how the geographic origination of these beauty brands plays a major role in the global reputation of the brand and in shaping consumer trends.
- To use the case study of three London-based beauty brands to understand branding practices and how they have reacted to sociocultural change within London.
- To conduct qualitative research in the form of primary interviews and document analysis to understand differing opinions towards the branding and representation efforts of the brands.

1.6 An introduction to the London-based beauty brands

Rimmel London

Rimmel London, established in London in 1834 (Chesters, 2012), has maintained its London-based identity throughout its branding history, describing London as their “playground” (Rimmel London, no date para. 3). Their historic tagline, ‘Get the London Look’ was updated in 2017 to ‘Live the London Look’ to reflect the changing London consumer - “the London Look is whatever you want it to be [...] people to feel like they can express who they are and what they feel regardless of gender or culture” (Passolas, quoted in Faull, 2017 para. 9).

Charlotte Tilbury

Charlotte Tilbury was founded in 2013, by London-born makeup artist, Charlotte Tilbury. Their Annual Report included their purpose of “mak[ing] everyone feel and look like the most beautiful version of themselves” (2021, p.4). The brand’s luxurious positioning within the beauty landscape is evident in the premium pricing strategy and the branding, which utilises supermodels and celebrities, such as Bella Hadid, Lily James and Kate Moss. Charlotte Tilbury’s turnover increased by 24.6% between 2020 and 2021 to £224.85 million (Charlotte Tilbury, 2021 p.4).

Iconic London

Iconic London, founded by Jade Elliot, was inspired by the “limitless energy of busy, city life in vibrant London” (Iconic London, no date para. 2) with a focus on ‘Instagram-able’ beauty looks, and continual product innovation (Iconic London, 2021). Their branding relies upon influencer partnerships and celebrity endorsements rather than global brand ambassadors or key celebrity figures. Their solely digital positioning across social media platforms (ibid) rather than traditional TV advertisements and billboards reflects changing trends in consumer behaviour within the beauty industry, with shoppers now exposed to brands globally.

LITERATURE REVIEW

2.1 Introduction

This literature draws together themes on Westernised beauty, decolonisation and the 'made in' effect to help understand the geographies of beauty brands and branding and investigate how this impacts decision-making for brands reacting to socio-cultural change.

2.2 Westernised Beauty

In the mid 20th Century, Simone de Beauvoir, a French social existentialist and feminist activist, defined the pursuit of beauty as being socially constructed, whereupon women are "defined by the standards society places upon them" (Festa, 2017 p.210). Only a few decades later in 1990, Naomi Wolf, a leading American feminist author, reiterated how the current aspirational beauty standards are socially constructed and imposed by Western society, in her article 'Beauty Myths'. In 2016, Durovic et al., (2016) noted how sociologists maintain the idea of Western society imposing an ideal, desirable form for women and beauty. Drawing these ideas together, it's evident societal ideals of beauty have geographical associations; with the global West playing a crucial role in projecting socially and culturally constructed ideals of beauty, one that overwhelmingly adheres to the white criteria.

Earle-Brown (2022) highlights how these Western beauty standards emphasise "whiteness [and] heteronormativity" (p.7) and those who don't fit these overwhelmingly dominant standards for beauty, and ultimately one could also argue standards of 'womanliness', can face "social exclusion from this social capital and judgement from peers" (p.2). It's clear these feminist authors critique these restrictive forms of beauty that have been sculpted from centuries of racism and colonialism; indoctrinated ways of thinking that women are forced to accept, sometimes and often unknowingly, especially the latter by Western white women.

Looking back on the past century, Picton (2013) argues how current beauty ideals articulate a triangulation of former imperial, neo-imperial, and globalisation discourses, "providing the socio-cultural framework in which associations between white skin and beauty have developed" (p.85). Picton frames this to be understood in a Foucauldian meaning; the discourse "as bounded social knowledge that makes the world knowledgeable and thus comes into being" (ibid, p.86). Yet, the societal and cultural discernment of an ideal skin colour and associated modes of beauty have varied geographically throughout history meaning the perception of idealistic white, Western beauty is socially constructed, largely through the branding of transnational beauty companies. Picton (2013) notes how "whiteness - as a marker of colonial superiority - is commodified" (p.86) and Durovic et al., (2016) highlight how beauty brands offer a single 'right' appearance for women. Thus, with beauty branding exerting excessive influence on the production of knowledge, it therefore allows and furthers the construction and reflection of Western ideologies.

To understand the geographical associations more acutely, imperial and colonial discourses can enable one to understand India's 'fairness complex' (Picton, 2013). The obsession with women wanting lighter, fairer skin and being the optimum skin

colour can be seen as a direct result of Western imperialism, leaving behind a legacy of white racial superiority. Moreover, the force of globalisation and the wave of neoliberalism in the late 20th Century arguably sustained this cultural and social judgement in India. In a similar vein, Davis Tribble et al. (2019) writes about the extent of 'colourism' in the US, a "global ideology that denigrates darker skin and tightly coiled hair" (...) "two unmistakable traits associated with African heritage" (p.382). They go on to note how their natural African beauty was associated with "negative socio-professional outcomes" and were "unprofessional, unattractive and unfeminine" (p.382) highlighting also the economic and political implications. Therefore, this "hegemonic 'Caucasianisation' of beauty concepts" (Picton, 2013 p.90) allowed this internationalisation of beauty ideals to emerge and dominate, meaning African and Asian women were forced to endure the dominant beauty narrative promoted and created by the West.

Taking one step further, Sklair (1995) looked at the global capitalist systems during the late 20th Century, where those in the 'periphery' of the West were forced to accept these standards of beauty and excess consumption lifestyles. Sklair (1995) argued this was enabled by the "international propagation of Western culture via the media and advertising" (p.90). Furthering this notion, Castree (2001) describes how the "constructed imaginative geographies" such as these adverts and billboards "fill the vacuum of geographical ignorance with questionable but commercially effective images of other places and cultures" (p.1520). It's clear that the overwhelming projection of Western culture and beauty through media and advertisements has continued the notion of colonial superiority globally, and allowed the aspirant geographically located lifestyles to dominate global culture.

2.3 Decolonisation

Following on from the ideas of whiteness as a marker of colonial superiority and reflection of imperial objectives, it is also important for this research to understand de-colonisation, especially in terms of the decolonisation of European geographies. It is important to understate that the colonialism being discussed here relates to questioning the role of the West and the prevailing 'Eurocentrism' evident in the global beauty market.

Eckhardt et al., (2022) describe decolonisation as involving a "paradigm shift from a culture of exclusion (...) to make space for other political philosophies and knowledge", with particular regard to questioning the "dominant Eurocentric perspective" (p.177) that was ripe in global knowledge systems. This is crucial for understanding how and why these London-based beauty brands are having to change their fundamental identities and brand ambassadors to stay ahead of the 'new' culture of diversity and inclusion. More importantly, rather than encouraging brands to include more diverse people in conversations, decolonisation obstructs traditional ways of thinking, essentially, "disrupting the status quo" (Eckhardt et al., 2022 p.177). These ideas reinforce what the "cultural economy of branding call (...) the 'manufacturing of meaning'" (Pike, 2009 p.623) whereupon previous cultural ideas have been continually capitalised upon and essentially 'manufactured' by beauty brands for profit-gain motives.

Pickles (2005) in his article on 'New Cartographies' notes the contrast between a Europe that represents global desires and ideals, and a "Europe of Europes" which is increasingly diverse and representative in "regional, socio-economic and racial terms" (p.356). The decolonisation of knowledge within the beauty industry in the West has allowed these marginal groups, seen previously as the 'Other' (Burton, 2009), to have tools to fight against cultural subjugation and lead to empowerment through various forms of consumerism (Terneus, 2018). It's clear that the symbolic geography that Morley (1998) discusses which "separates the insiders from the outsiders" (p.358) within Europe is not entirely evident. Arguably the globalisation and removal of fixed borders between the West and the rest of the world facilitates some rejection and transformation of consumerism by formerly colonised populations to reclaim a sense of agency and power.

It's clear that for attempts to understand how the 'Western empire' has evolved in an increasingly neo-liberal and globalised world, one must examine the geographies and consumerism of these transnational beauty brands and whether they still dominate subjugated communities in new and often undetected ways.

2.4 Country of Origin (COO) / 'Made In'

Globalisation has underpinned the 'country of origin' (COO) or 'made in' effect, wherein consumers use historical reputations, and production and design capabilities, to judge countries for particular goods and services (Pike, 2009). Defining the COO or highlighting a 'made in' association can be critical for creating consumer trust and positive associations for a brand. Moreover, this can be associated with the rapidly growing and widespread idea of a brand being a "common currency" (Pike, 2009 p.622) with the brand name helping articulate the character and identify the quality of commodities related to a particular geographical origin.

FutureBrand (2015) commissioned a survey asking consumers to rank the importance of brand origin when it comes to their purchasing decisions. The results suggested that the COO, as well as design and manufacturer, were ranked higher than the "traditional drivers of choice" such as price, style and availability (p.11). Moreover, the specific geographic location of a brand was ranked the most important of all drivers (ibid). One can argue that within this borderless world, the intangible asset of having a positive location associated with a brand despite differing places of production along the supply chain is a crucial way of differentiation.

Within FutureBrand's study (2015), they noted also that the locational reputation stretches beyond the national level and includes the city level as being equally powerful drivers of positive associations, noting that London, New York, Paris and Milan were identified as the most influential city brands. These cities carry "associations of urban sophistication, style and design" and when combined with national-level brands "can drive powerful narratives, icons and symbols to help define and differentiate goods" (p.34). Similarly, Weller (2007) noted the "stylistic and temporal dominance" (p.60) of these cosmopolitan cities.

Pecotich and Ward (2007) highlight the increasing interaction between global branding and the COO of products in their article titled, 'Global branding, country of

origin and expertise: An experimental evaluation'. They attribute this to the "globalisation of markets combined with the paradoxical rise of nationalism" (pg.271) wherein these "imagined communities" allow consumers to view particular countries, regions or cities more positively than others. In contrast to FutureBrand, Pecotich and Ward (2007) emphasise the brand name as the greatest conveyor of COO connotations. Interestingly, this article adds a geographical perspective to their article in contrast to the marketing-based research of FutureBrand, highlighting how having a strong brand name can prevent the negative connotations of brands shifting their production processes to developing countries in pursuit of lower manufacturing costs.

2.5 Summary

This Literature Review highlights the deep-rooted history of the geographies of beauty brands and branding, with roots in colonial imperialism and projections of Western beauty globally. This will enable one to understand how beauty brands continually are having to change their branding to keep up with current social and cultural changes globally. As the beauty market is becoming ever more competitive and crowded, can the more traditional beauty brands still locate themselves in a particular region and ultimately do they still represent the values, community and social groups evident in the city?

METHODOLOGY

Utilising a socio-spatial method of data collection, the data will be triangulated from research into the published documents of three London-based beauty brands with semi-structured interviews and published literature. As discussed above, London's deeply rooted imperial past contrasts with the current ethnic diversity of the city, serving as the chosen site for analysis into the evolving and fluid geographical associations within beauty branding.

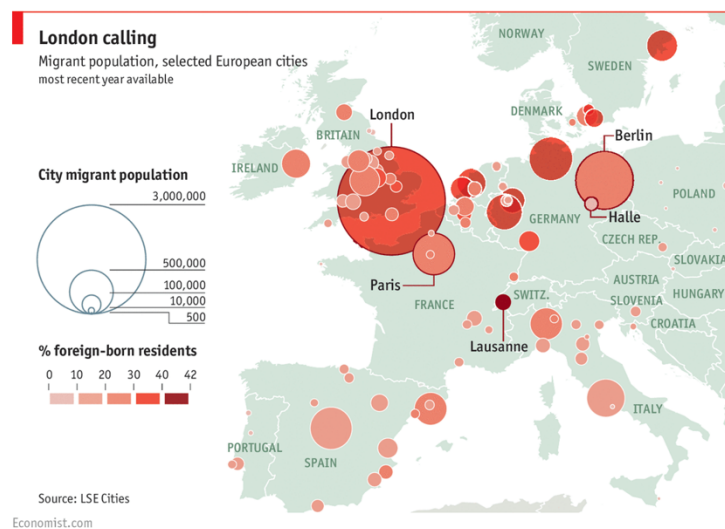
This in-depth, focused method of data collection allows understanding of the methods utilised to (re)construct and acquire brand meanings, and determine the fluid, complex and multi-dimensional use of spatial associations. While focus groups were contemplated as a data collection method, this was deemed inappropriate due to the sensitive nature of certain conversations regarding diversity, inclusion, and representation. The following section will introduce London as a case study and detail the analysis methods utilised for the research.

3.1 The World in One City: Superdiversity and Multiculturalism in London

With a population of over 8.8 million and over 300 languages spoken (ONS, 2021), London is a clear 'global city' (Sassen, 1991), a magnet for migrant populations from across the globe (Sepulveda et al., 2011), attracted to the social, cultural and economic makeup of the city. With the continuously shifting geography of diversity within London, 46% of the total population being Black or ethnic minority and 41% not born in the United Kingdom, it is not surprising that 8 out of the 10 most diverse boroughs in the UK are in London (Gov.UK, 2022). Figure 2 reveals how London is in a league of its own compared to its European counterparts in terms of migrant

population, leaving notoriously cosmopolitan cities such as Paris and Berlin relatively homogenous in comparison (The Economist, 2016). Vertovec (2006) coined the phrase 'superdiversity' to describe the increasing diversification and dynamism of London's population (Pardo, 2018), often used now in academic discourse to understand this "interplay of different dimensions of diversity" and "multiplicity of local variation and new international linkages" (p.492) evident in London.

Figure 2:



[LSE Cities, The Economist, 2016]

Pardo (2018) highlights the enduring relationship between the “contemporary city and its imperial past” (p.53) when discussing the multiculturalism evident in London today. Being a product of its postcolonial history, this has allowed the creation of postcolonial discourse, especially regarding the beauty industry. The BAME community are actively maintaining their heritage and identity regarding beauty ideals, and continually rejecting the colonial marker of whiteness as the pinnacle of beauty standards globally. This multiplicity of ideas, tastes, languages, and cultures interconnects within the shifting geographies of the city, rejecting the notion of a singular marker of beauty and forcing the beauty industry to react to the diversity evident. Going back to the notion of ‘superdiversity’, Vertovec (2007b) notes how London’s migrant population has developed from typically formerly colonial regions to now include “new, small and scattered, multiple-origin, transnationally connected [and] socio-economically differentiated” (p.1024) migrants over the past decade. One could argue that these ‘new’ migrant populations are seeking to identify and reject Western bias within beauty. This refusal to accept the imperial marker of white beauty was, perhaps, involuntarily accepted by former colonial migrants to London. It’s clear that decolonisation in London is ‘forcing’ the beauty industry to re-address and reflect this ever-increasing hyper diversity evident in the city.

3.2 Qualitative Methods

A qualitative method was chosen to complete the research, as by “grounding knowledge in people’s experiences [...] simultaneously, connecting these new ideas

about what is happening, a new sense of what is real is constructed” (Ramazanoglu and Holland, 2002 p.43) allowing greater understanding of the fluidity of the topic discussed. This methodological approach allows the research to delve deeper into the embedded context and understanding of the impact of branding, particularly when discussing sensitive topics of diversity, inclusion, and representation. The study of this complex spatial socio-cultural phenomenon requires the congregation of various ideas and perspectives. The methods used will attempt to “make sense of phenomena in terms of the meanings people bring to them [...] involving an interpretive, naturalistic approach” to the subject (Denzin and Lincoln, 2000 p.2). Particularly useful for understanding the inescapable complexities of the relationship between brands and branding and the sociocultural complexities of London, qualitative methods rid the research of a static view of spaces and places that disregards the complexity of the experiences of various individuals (Bryman, 2012).

33 Data Collection

3.3.1 Semi-Structured Interviews

Primary data was gathered through a series of six semi-structured in-depth interviews with key figures involved in the branding circuit in London. These involved key figures in the branding and marketing departments for London-based brands, beauty journalists and online commentators. The anonymity of these participants has been established using pseudonyms (see Figure 1 below). Purposeful non-probability sampling (Bryman, 2012) was used to select the interviewees. A network of connections from previous internships at London-based beauty brands were utilised to select relevant participants. ‘Snowball sampling’ was exercised also (Bryman, 2008; Curtis et al., 2014), wherein initial contacts I reached out to were used to initiate contact with further potential interviewees in the beauty industry.

Figure 1:

Pseudonym	Occupation
Olivia	Beauty Journalist
Polly	Beauty Journalist
Emily	Branding & Marketing Specialist at a London-based beauty brand
Chloe	Branding & Marketing Specialist at a London-based beauty brand
Helen	Branding & Marketing Specialist at a London-based brand
James	Branding Specialist and Consultant

A general interview schedule was created with the key themes, but the order and wording of the questions depended on how the interview proceeded. Peters (2017) noted how this will allow the interview to “remain focused on relevant research themes but incorporate flexibility in allowing the conversation to flow naturally” (p.112). This degree of flexibility also allowed focus on the individual's in-depth

perceptions and understandings surrounding individually sensitive topics compared to standard questionnaires or other quantitative techniques. Moreover, open-ended, semi-structured lines of inquiry are more likely to elicit thoughtful responses from participants, adding detail and richness to the data. Before completing the interviews, the schedule was piloted to ensure clarity and refine the interviewing process. The interviews were all conducted online, using Microsoft Teams. Conducting interviews online has the benefit of interviewees being able to “remain in a safe location” (Hanna, 2012 pg.241) reducing pressure on the participants and allowing the conversation to flow more naturally. While there can be some notable limitations of completing online qualitative interviews, including bad signal connection and inaudible responses (Seitz, 2016), the pilot interviews ensured the location of the interviews had sufficient internet connection without disturbance.

Data Analysis

The interviews were then transcribed, and data uploaded to the CAQDAS software, NVivo. ‘Nodes’ were identified as key topics within the data, which led to the emergence of key themes. Section 4 of this paper details the results of this analysis once triangulated with the secondary data analysed below. This qualitative study lent itself to a deductive approach, whereupon the ‘nodes’ identified were based on published theory evident in the Literature Review. Essentially, this theoretical approach involved “identifying themes [and] evidence in the data of the patterns that were articulated in the propositions of the study” (Pearse, 2019 p.266-7), thus I was attempting to relate existing, although limited, theory on this spatial phenomenon to the beauty industry in London.

3.3.2 Document Analysis

Secondary data was collected and analysed using published online documents, including annual reports and financial statements, and also TV and social media advertisements. Bowen (2009) details how document analysis requires “data to be examined and interpreted in order to successfully elicit meaning, gain understanding and develop empirical knowledge” (p.27). Combining this document analysis with the semi-structured interview data validated and corroborated the data obtained and analysed during the research; a “strategy designed to increase the trustworthiness of a study” (Morgan, 2022 p.65) and minimise the possibility of biases.

These documents show a ‘snapshot’ of a particular time, often annual, to help understand evolving branding methods utilised in response to socio-cultural changes. These documents are socially constructed, meaning while they can infer more than just the information they contain, awareness of authenticity, reliability, and context in which it was produced as well as the authorship of the text is vital. Looking at brands advertising can provide a rich source of information; wherein projected ideas are shown, and they can heavily influence geographical stereotypes. Understanding the “biased selectivity” of documents (Bowen, 2009 p.32) is crucial, and how organisation-published documents may provide “access only to content aligning with the values of its chief executives” (Morgan, 2022 p.66). Wariness and understanding of any potential “biased selectivity” (ibid) are detailed in the following sections.

The analysis involved locating particular words, phrases and ideas within the content of the documents, and understand how the role of particular language used in branding can give meaning, impacting how one sees and understands this geographical phenomenon. The analysis was situated within wider contexts, as identified in the Literature Review. Both the structuralist/political economy ideas of ideology, colonisation and cultural hegemony, and the post-structuralist/Foucault-inspired ideas of understanding how particular ways of thinking and 'truths' have become and are continually established were implemented. Determining the authenticity, representativeness, accuracy and meaning of the documents is crucial for the analysis and for research credibility.

3.4 Limitations of research

The outreach and confirmation of potential candidates to interview was a major obstacle for this research, with many perhaps not wanting to 'judge' their brands' branding practises or speak out, despite continuous communication regarding the full anonymity of their identity. Despite my contacts from previous internships, the size and influence of these London-based beauty brands with global reach meant getting through to specific branding and advertising actors was challenging. The number of interviewees was less than expected as a result. Nevertheless, utilising the 'snowball' strategy enabled access to further applicable actors across other brands. Hence, the research focuses on three brands rather than one, to ensure breadth and understanding of the London beauty industry in the short period of data collection, and also a more representative sample of the industry as a whole.

3.5 Ethical considerations

Being mindful of my positionality throughout the study process was crucial due to the research's qualitative and socio-cultural nature. Potentially deeply sensitive subject matters were discussed including British colonialism, subjugation of 'other' beauty cultures, ethnic and racial representation and inclusivity. Taking this social constructivist approach, I, as a white, Western researcher, must pay attention to my "own and others' racialised and cultural systems of [...] knowing and experiencing the world" (Milner, 2007 p.388). Being actively engaged and understanding of the tensions that can rise when conducting socio-cultural research into representation is imperative. Throughout the process of data collection and subsequent analysis, much thought was given to my positionality, and the process of "unlearning about misinformation and stereotypes we have internalised" (Tatum, 2001 p.53) to ensure the experiences of London beauty consumers were represented and honoured with integrity.

Working closely with a variety of interviewees meant that providing informed consent was vital. Before agreeing to participate, the interviewees were given an information sheet containing information on the research, potential topics to be discussed, interview procedure, anonymity and ability to withdraw. This detailed how the interviews were to be audio recorded for transcription purposes, and how the personal details of the participants would be fully anonymised using pseudonyms. All recordings and full transcriptions were destroyed following the completion of the analysis to further ensure anonymity.

ANALYSIS

The following section sets out the findings of the data collection, split into three sections guided by the research questions.

4.1 London Stereotypes and the Construction of Rooted Imaginative Geographies

4.1.1 Origin Cues

This research into the beauty industry supports Pike's (2009) findings of brands utilising a geographical location through "country image identifiers" (p.626); stereotypical imagery and associations of origin. Helen, Chloe and Emily all mentioned similar origin cues when discussing the representation of London in beauty branding:

Helen: I feel like it's those iconic things - so for London even if you have never been, you think of the black cab, red buses.

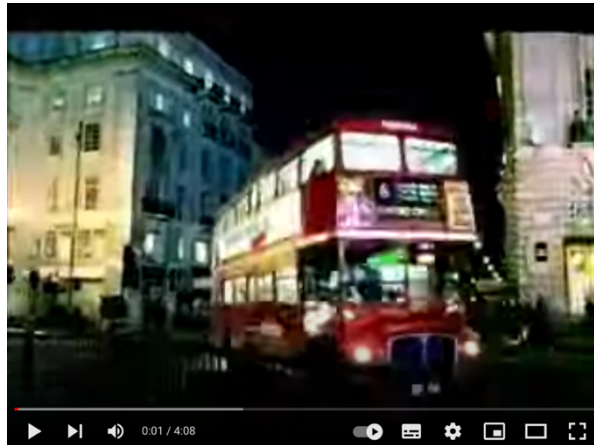
Chloe: It's always this cityscape in all the advertising, it's really subtle but it's always there.

Emily: You always see cityscapes - Houses of Parliament, Tower Bridge, they are always in the background connecting you to London.

These origin cues and increased demand for authenticity can be attributed to the competitiveness and standardisation evident in the globalising market for beauty, resulting in homogenisation and reduced uniqueness of products. London-based beauty brands play on their origination as a way to construct "imaginative geographies" with these "commercially effective images of other places and cultures" to a global audience (Castree, 2001 p.1520). James relates this to the notion of "representation", noting how "cities like London, they always come with a representation" made up of certain "imagination and associations".

Upon research into the branding of London-based beauty brands, Rimmel London's TV advertisements perhaps represents the epitome of brands utilising origin cues. Figure 3 (2007) and Figure 4 (2020) below are both screenshots from Rimmel London TV advertisements, and both feature the stereotypical associations of London, with the red bus, and in 2020, the cityscape of Tower Bridge.

Figure 3:



[Lemonjello9, 2007]

Figure 4:



[Rimmel London, 2020]

For Rimmel, the utilisation of these origin cues in their branding allows the brand to position themselves “favourably on the [geographic] mental maps of consumers” (Paterlini et al., 2012 p.312), with the weight of a major global centre lending legitimacy and credibility to products.

Helen observes how “*London tends to have connotations of being quite exclusive and desirable*” and so using these geographic cityscapes and associations of origin has enabled Rimmel to quickly and easily “*summarise locations for the intended buyer*”. The ‘Britishness’ associated with London still resonates with a global audience (Pike, 2015, Emily, Helen, Chloe) and comes with increased perceived value, constituting the “economies of the invisible” (Kubartz, 2011 p.624).

Indeed, the imperialist dominance of London and its continued influence over international markets, branding the city with associations of “authenticity, quality and tradition” (Goodrum, 2005; McDermott, 2002; McRobbie, 1998; Pike, 2015 p.113); these affixed desirable connotations (Keller, 1993) have been realised and

reproduced by beauty brands as a marker of difference. Branding teams are effectively pulling an imaginary “mystical veil” (Greenberg, 2008 p.31) over global consumers through their construction of imaginative geographies, shaping positive associations of their products through geographical origination; as Olivia notes: *“it’s the smallest little indicators but they make you feel like you’re part of this cool thing”*.

This “meaning making of branding” (Pike, 2009 p.624) for the beauty industry relates back to London’s history of colonialism and British imperialism; wherein the ‘British’ or ‘Western’ notion of beauty was renowned globally, and global shoppers still buy into this branding. The historic identification and representation of origin cues for London are “inescapably” and continually “entangled” with their spatial context and connotation (ibid).

4.1.2 Differentiating versions of London

Looking at the annual reports of another London-based beauty brand, Charlotte Tilbury, it’s clear that some brands are choosing to portray certain versions or aspects of London in their branding. When discussing how best for brands to portray their geographic location attached to their branding, James notes the differences between a quality-focused brand, such as Charlotte Tilbury and a mass-market brand, such as Rimmel London;

James: If you are a quality driven [...] brand then it is more about ingredients, not so much about the gender, ethnicity etc [...] for brands that target a broader audience, then it becomes more of a question of how you [...] communicate more broadly and be more attractive for different consumer bases.

It is clear Charlotte Tilbury have made the decision not to openly communicate about their geographical location of their head office as part of their branding strategy or indeed reference to it in their annual reports. Instead the brand simply highlights their London heritage and uses Charlotte’s regional London accent as a branding tool for global consumers, emphasised by Chloe:

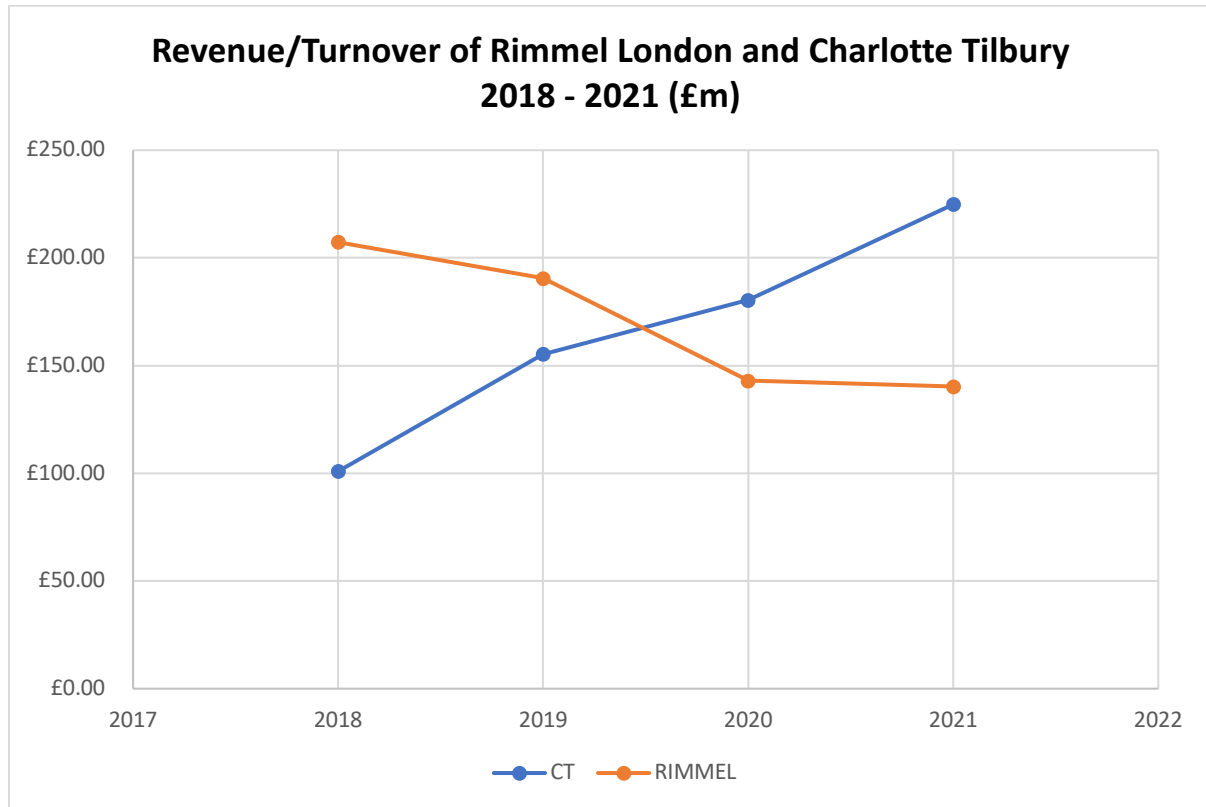
Chloe: And then equally [Charlotte Tilbury] don’t really play on being from [London] apart from some of the visual merchandise and pop ups, [they will] shove a pink phone box in. I think that there are some nuances to it but I suppose it’s all down to the fact she’s English.

Pike (2015) notes this strategy utilised by brands with international reach; the ability to downplay origin cues yet still actively playing on their geographical links through certain aspects of the brand. Secondly, Charlotte Tilbury’s 2021 Annual Report focuses on the efficacy of ingredients, noting “new product innovation” and prioritisation of “technological innovation” (p.4-5) for skincare launches, highlighting the quality-driven nature of the brand James expected.

This makes one question whether the place-based, city-scape branding used by some brands such as Rimmel London has more ties to a geographical location than a brand that plays on their location heritage through key actors in the firm. The geographical associations and origin cues are less essential components of the Charlotte Tilbury brand. Yet, this severing of origination seemingly has no inherent

impact on the commercial success of the brand in valued markets (Pike, 2015). Indeed, Figure 5 notes the revenue/turnover of the two brands, suggesting that a move-away from traditional place-based branding towards more fluid origination can aid long-term financial growth.

Figure 5:



[Source: Charlotte Tilbury Limited, 2019; 2020; 2021; The Financial Times, no date]
[Graph: author's own]

Moreover, this furthers the argument of what version of London are beauty brands trying to show? Is it the glitz and glamour of the historic “swinging London” (Pike, 2015 p.122) as evident with Charlotte Tilbury in Figure 6 below, or in the case of Rimmel, is it the stereotypical cityscapes and buildings in London that resonate more with beauty shoppers globally? One could argue that in trying to relate to a broad, international audience, the standardised branding strategy and reliance on London cityscapes assumes all global consumers have identical desires and opinions.

Figure 6:



[Malivindi, 2022]

Both these arguments highlight the long embedded ‘cliche’ of Western quality for beauty. Whether the geographically located branding is spotlighted openly in the branding or simply in the regional London accent used in all advertisements, global beauty shoppers still have an affinity for British-located products - despite production and manufacturing often being located across the globe – with Olivia cementing how London “*is and will always be an iconic city*”. The ingrained affinity for British branded goods is “*steeped in us and that is just something that has been passed down from generation to generation*”.

4.2 Ethnic and Racial Representation in London-based Beauty Branding

A common theme emphasised throughout the interviews and policy documents was how London-based beauty brands have increasingly turned to more diverse brand ambassadors for their branding in an attempt to better represent the ‘London’ consumer. As mentioned, the socio-economic superdiversity evident in London needs to be represented within the branding so that London-based consumers can increasingly see themselves in the brand:

Olivia: “*It's so important because you're not going to buy it unless you have got a realistic representation of what it's going to look like on you*”.

It's clear ethnic and racial representation is still a major issue for London-based beauty brands, with brands having to address the "diversity and challenge of such entangled geographies" (Pike, 2009 p.635), and no longer sustain the historic geographical imagination of Britishness without expressing the diverse reality of London.

4.2.1 Ethnic talent in branding and advertising

Chloe referred to the tokenistic use of ethnic minority talent within the branding of London beauty brands, referring to the use of beauty models for branded advertisements when noting:

Chloe: I feel it is still quite tokenistic. I've been in casting calls, and it is like oh we need to make sure we have a black girl.

Similarly, Emily noted the importance of beauty brands working with:

"[...] diverse ambassadors for genuine reasons [...] consumers aren't afraid to call out brands that use a specific brand ambassador for a particular celebration/moment in the year".

Polly also warned against the "*performative*" use of diverse brand ambassadors. This conforms with the thoughts of Thomas (2020) who highlights how beauty consumers aren't afraid and, crucially, have the means to spotlight brands that associate with problematic personalities, particularly surrounding racism and inequality. As beauty consumers globally are exposed to a wide variety of beauty traditions and cultures across social media, this socio-cultural distinctiveness is to be expected from and within the brand, even when spatially located in a particular location historically associated with the homogenisation of beauty cultures.

From research into the annual reports and policies, it is evident that London-based beauty brands are increasingly taking socio-cultural representation of their geographical origination seriously. Indeed, Polly notes how "*change is definitely happening [...] but there's still a long way to go*".

Coty's 'Diversity, Equity and Inclusion Letter' on behalf of their brands profusely highlight how "we believe in equity and inclusion for all" and "believe that embracing each other's differences, be they differences in beauty, cultures [...] make our organisation richer" (Delbos, 2023 pg.1). While at surface level this can be seen as truth, describing diversity as making their company "richer" could be portrayed as brands pulling the "mystical veil" over their consumers (Greenberg, 2008 p.31) through pushing this portrayal and ingrained culture of inclusivity. One could also question whether this enables the profit-making ambitions of the brand, to ensure customer retention and to stay relevant with London customers - something especially relevant for an older, more traditional brand such as Rimmel. Indeed, the "intentional propagation of western culture" of inclusivity through branding and advertising has enabled brands to "sustain economic domination and profits" in the global market (Sklair, 1995; Picton, 2013 p.90).

Comparably, looking at Charlotte Tilbury's Annual Report and Financial Statements between 2018 - 2021, the only mention of ethnic representation was in the 2021 report, with reference to the brand paying "particular focus to the company's diversity and inclusion initiatives" through introducing "training programmes, recruitment initiatives and an apprenticeship scheme to attract and develop the very best and diverse talent" (Charlotte Tilbury, 2021 p.6). Arguably, Charlotte Tilbury is paying more attention to staff retention and development rather than understanding and ingraining an inclusive culture. The lack of detail in the annual reports, especially those published over the Black Lives Matter movement in 2020, suggests a lack of willingness for the branding and brand culture to be increasingly diverse and representative of their London customer base.

Olivia furthers the notion of deeply rooted prejudice and bias within London-based beauty brands when discussing whether there is still a sense of 'otherness' of ethnic minority models within the branding:

Olivia: [...] for years [ethnic minorities] weren't included in the way that they should have been, and now maybe it just feels like a surprise to see someone with deeper skin more often because for years they were just not respected and brought into a campaign in the same way.

The adherence to a large number of social norms that have been historically evident in the branding of London-based beauty brands can be directly related to colonialism and imperialism. For years, images of beauty have reflected a colonial conception that privileges the white race, with the 'norm' for beauty having always been thought to be fair skin. Importantly, once established, these geographical perceptions and embedded reputations can become 'sticky' (Pike, 2015) and challenging to change. This perhaps adds some clarity to the long ingrained cliché of quality for western brands yet doesn't excuse the beauty industry's lack of ability to champion long term positive change in terms of diversity and inclusion within branding.

4.2.2 Accessibility versus Aspiration

Another key theme raised throughout the interviews surrounded the idea of accessibility versus aspiration - what talent could be utilised within the branding that was both representative but also aspirational for the London beauty consumer? Jones (2011) notes this co-existence of "advertising glitz" with a "search for authenticity" (p.340) within the branding of Western beauty brands, who all individually brand themselves amongst this spectrum. Chloe mentioned her perception of the branding strategy for Charlotte Tilbury:

Chloe: She wants it to be accessible, she wants it to be for everyone, but she wants it to look and to be very aspirational.

Charlotte Tilbury has historically used fashion supermodels for their branded campaigns and launches, often featuring the likes of London-born model Jourdan Dunn, and British cultural icon Twiggy (see figure 7 below). The latter, reminiscent of the 60s "swinging London" Pike (2015 p.122) notes in stereotypical London-based branding, is effectively used perhaps not to be representative of the London

population but rather to be aspirational to beauty consumers through playing on the cultural heritage of London supermodels.

Figure 7:



[Javed, 2020]

Yet, Charlotte Tilbury also increasingly utilises localised talent across their geographic markets, such as the Korean actor Han Sohee as their first Korean muse (Kim, 2021). For London-based brands, it's evident that the branding is centred around Western culture, but also heavily promoted by local beauty icons (Rebufet et al., 2015) for increased international brand loyalty while retaining a specific geographic heritage. For Charlotte Tilbury, it's discernible the brand originates itself with the glitz and glamour of historic western society - almost a nod to Great Gatsby-esque culture, but also market this global vision with popular local spokespeople. This highlights the fluidity of geographical associations Pike (2015) notes evident in the branding of London beauty brands.

Charlotte Tilbury also features Kate Moss heavily throughout their branding and proceeded to make her the 'face' of their 'Beautiful Skin Foundation' in 2022 (figure 8), describing Kate as "iconic, timeless and inspiring" (Team Tilbury, 2022 np). It is clear through the interviews that London-based beauty brands view Kate Moss as arguably the embodiment of London beauty having featured in Rimmel adverts since 2001 and most recently in Charlotte Tilbury's 2022 Christmas campaign:

Emily: *"Kate Moss instantly comes to mind"*

Helen: *"I personally think of the blond girl with the gap in her teeth"*

Figure 8:



[Charlotte Tilbury Beauty, 2022].

Yet is Kate Moss representative of the socio-cultural complexities of London? One could think not. As Chloe mentions:

“What is London now? It’s not Kate Moss, it’s so diverse, so multicultural.”

Perhaps for Rimmel, the geographically entangled brand identity of Kate Moss with London meant reworking was challenging and could explain the longevity of their 15-year brand relationship. This concept of brand path dependence (Pike, 2009) can be seen, wherein the “socio-spatial histories” of Rimmel imparted a “degree of path dependence upon their subsequent evolution” (p.628), and the brand has faced difficulty differentiating their continued London-based identity of the brand, and increasing their brand awareness, without Kate.

Looking at Census data from 2001, 91.3% of the British population were white, and only two boroughs in London - Newham and Brent - were the first in the UK to have a majority of Asian, black, mixed or ‘other’ ethnic populations (BBC, 2001). Perhaps back in 2001, Kate Moss was emblematic of London culture. But today, in a city of immense superdiversity it’s clear that one singular white woman, arguably epitomising the “lingering Barbie-style homogeneity” (Jones, 2011 p.312) of beauty models in the West, cannot be representative of London. Importantly, this embodies the move away from the historic imperialist aesthetic paradigm of beauty conforming to the white criteria that once saturated the beauty industry.

4.2.3 Diversity amongst Global Supply Chains

Another key finding from the interviews was how the geographic structure of supply chains for London-based beauty brands can impact on progress in diversity and inclusion, with Helen noting:

[...] Are they authentic in your whole supply chain, are your leaders at the top diverse? It’s important that it is not just face value.

Beauty brands are evidently intensifying their focus on the fundamentals of branding and marketing while outsourcing an ever-increasing portion of their value chain to other specialised nations for manufacturing and production (Pike, 2015). Lack of understanding or control of international global supply chains can result in decreasing equity and inclusion for those involved under the brand umbrella but working across geographical space:

Olivia: One of the key things I think more and more people need to be doing is hiring a more diverse team so that at every single touchpoint you have diversity across every part of your brand.

While Pike (2007) notes how brands with strong regional ties and city-based origination can produce both tangible and intangible outcomes for development, including those more indirect outcomes resulting in economic opportunities for nations across the supply chain, it could be seen that development is only regionally bound to the city of origin. While diversity and equity are an imperative for those based in London to ensure representation, the spatial circuits of production, circulation and regulation are highly socially, culturally and economically uneven. Ensuring increased diversity and equity among global value chains allows brands to reduce uneven development through reducing rather than amplifying asymmetrical socio-spatial relations and divisions of labour (Pike, 2009).

Having a diverse team in both head office and along the supply chain should be realised as a business imperative and shows consumers a willingness to remove the *“institutionalised racism within the depths of leadership teams”* (Emily) that was historically evident within London-based beauty brands. The annual reports from the beauty brands all mention to some extent supplier relations; Charlotte Tilbury’s 2021 report noted how *“reliable, long term supplier relationships are critical to the Company’s ongoing success”* (p.7). It’s clear that brands are realising the importance of maintaining supplier relations, with consumers no longer swayed by the *“mystical veil”* (Greenberg, 2008 p.31) of branding and more so by the product efficacy and representation of the brand along its supply chain activities. Maintaining the London-based branding surely should ensure beauty brands become more representative of the geographical space they inhabit and along their global supply chain, to celebrate the socio-cultural diversity of the space.

4.3 Rise of producer countries competing against London beauty brands

Historic narratives of Western-based beauty brands being the embodiment of quality and manufacturing standards has been challenged with the rise of traditionally manufacturing-based economies, including India, the Middle East and Asia, increasing their share in the global beauty market. James notes this evolving *“global architecture of brands”* as the spread of brands becomes ever more global - North Asia now represents 35% of the total global beauty industry, with Europe trailing behind at 22% (Howarth, 2023).

4.3.1 The Asian Century

Iconic London’s 2021 Financial Report interestingly included a breakdown of their annual turnover by geographical market (see Figure 9 below). Iconic London experienced a 59% increase in turnover in the Asia-Pacific market, compared to a 12% decrease in the United Kingdom between 2020 and 2021. While this could be attributed to a saturation of demand in the home market due to its historic roots there, it also importantly reflects the rise in demand for beauty commodities in Asia-Pacific.

Figure 11:

4. Turnover		
The whole turnover is attributable to the principal activity of the Company.		
Analysis of turnover by geographical market:		
	2021	2020
	£	£
United Kingdom	9,266,570	10,578,896
Europe	448,161	483,811
North America	5,166,474	4,769,010
Asia-Pacific	559,101	350,536
	15,440,306	16,182,253

[Iconic London, 2021 p.25].

James noted the rise of “*some of the producer companies or the manufacturers where they produce the raw material and so forth, so South East Asia, Singapore*” and notes how “*over the longer-term [these] places [...] may become more relevant*”. The rise of producer nations competing with the historic Western centres such as London can be attributed to increased consumer awareness of the ingredients and efficacy of the products they are buying.

Globalisation has accelerated the international flow of knowledge and information across the internet, with beauty consumers globally now more aware of ingredients used, and also the sustainability aspect of the global supply chains used by London-based beauty brands. Chloe attributes this to “*the global shift that we are seeing globally*” with the “*rise*” of “*Eastern power markets like India, China and the Middle East*”.

This plausibly allows one to question the sentiment of Paterlini et al., when noting “[.] the products produced by a less-developed country are judged under the image of its political-economic situation and not by their intrinsic quality” (2012, p.313). The evident rise of traditionally producer-based economies within the global beauty market can be attributed not only to the social and economic development of the location but also importantly the quality of manufacturing and product efficacy that was previously overlooked. Indeed, the geography of beauty brands has changed exponentially over the past few decades, with the traditional spaces - London, Paris,

New York - still retaining their “stylistic and temporal dominance” (Weller, 2007 p.60) but are being joined with international economies, in particular, as Emily notes: “*there is definitely an appetite for beauty from Japan and Korea*”.

Korean beauty, otherwise known as K-beauty, focuses on skincare infused makeup and is characterised by a focus on product innovation and short product life cycles. Estimated in 2017 at just over £10bn in 2017, K-beauty is now amongst the 10 top beauty markets globally (Intel, 2017). Iconic London’s 2021 Annual Report highlights facing “vigorous competition from other brands worldwide [...] across a number of international territories” and to control this, the brand “continually invests in brand marketing and innovates new products in a timely manner to suit changes in consumer tastes, attitudes and trends” (p.3). While not actually noting what these changing “tastes, attitudes and trends” may be, it can be inferred that the “timely manner” of new product launches is in response to the fast-paced turnaround characteristic of K-beauty.

It’s evident that London-based brands must acknowledge this considerably faster pace within the product life cycles to compete with the K-beauty paradigm and that innovation is essential for survival. In order to compete on an equal basis with their Korean competitors, this necessitates the adoption of a new model for development for London-based brands with a global reach. Iconic London’s attempt to keep up with international competition in an increasingly global potential customer base suggests how London-based brands cannot rely on traditional perceptions of Western beauty in terms of perceived quality.

4.3.2 Foreign brands moving to London

In a similar vein, the research highlighted how the geographies of London-based beauty brands have expanded to include not only brands of London or British heritage, but also international brands choosing to set up their HQ in London. Olivia discussed the brand TONIC15 - a Korean brand whose head office is in London:

Olivia: [The brand has] really got a [reputation] for being one of the best Korean beauty brands, but she lives and operates out of London. [...] the heritage of the brand is Korean [...] she has brought tools to London, which are very steeped in Korean heritage.

In an ever-changing and frequently unpredictable competitive economic landscape, the pursuit of the distinctive and the innovative could explain the shifting geographies of previously nationally-bound beauty brands; Chloe attributing this to the “*economic shift*” allowing previously producer-dominated nations the resources to compete on the global scale. Yet, these changing markets must be pursued while maintaining a critical eye on the origination and credibility of the brand (Pike, 2015) to ensure integrity and reputation is not undermined.

Similarly, Chloe mentions Waldencast, described as a “London-based incubator” for start-up beauty brands (Sandler, 2022) who offer “an alternative, unique path for entrepreneurs to scale great independent brands” (Waldencast, 2023 para. 2):

Chloe: [Waldencast] have set up a sustainable company that is also more diverse and talks about different beauty stories not just from the Western world [...] it's based in London.

This rise of Eastern and Asian beauty brands choosing to set up their head office in London could be attributed to brands understanding the diversity of the London consumer, but also understanding the ease of access to Western markets in terms of geographical proximity. Underlying both these reasons, perhaps, is the inescapable connotations of London, of British quality and traditions - an intangible asset that arguably will never concede.

CONCLUSION

5.1 Summary

How has London been branded by beauty brands to reflect the city?

Through the analysis of a quality-focused brand and a mass-market brand, the fluidity and multiplicity of geographical associations utilised by London-based brands is evident. Particular spatial and temporal imaginaries are created and utilised by brands as a form of economic differentiation and aiding in reduced global competition. The over-branding of beauty commodities, lifestyles and locations is apparent, as a result of hyper-aware branding actors to the growing domination of global niche brands. Rimmel London's continual use of stereotypical geographical signifiers of London throughout all touchpoints of their branding furthers Goldman and Papsen hypothesis of brands "hurl[ing] the kitchen sink of signifiers into frantic efforts to stand out" (2006 p.328-9) in highly globalised markets.

The "blurring of the authentic with the fictitious" (Pike, 2015 p.198) as evident in the highly spatialised branding combined with the continual dynamism and complexity of London over time makes origination to the city increasingly complex and "slippery" (ibid p.196). Charlotte Tilbury's decision to remove geographical signifiers from their branding could be attributed to wanting to avoid the "slippery" (ibid) nature of representing the socio-cultural and economic complexities of the city. Relatedly, Rimmel London's updated tagline to 'Live the London Look' (Rimmel London, no date) highlights branding actors' understanding of the evolving character and complexity of the city within the spatial circuits.

Who is the London beauty consumer and are they represented in the branding?

Branding oneself as part of/from a city of such super-diversity is unquestionably complex. The utilisation of increasingly ethnic and racial representative brand ambassadors relates to Molotch's research into the appropriation of a 'personality' or 'spirit' (2002 p.666) of particular spaces in geographical associations by branding actors. While branding oneself with a character so embodying of the city can cause associations to become overtly 'sticky' as in the case of Rimmel London with Kate Moss, utilising diverse brand ambassadors with associations to London has been used effectively as a way to root themselves and represent the city to global audiences, as is the case with Charlotte Tilbury and, more recently, Rimmel London.

Maintaining a spatial fix to London within the branding is frequently only a transient success, with the origination needing regular attention, sustainment and development due to the disruptive logics of the commodity market. Growing awareness of global markets and competition as evident in the published Annual Reports from brands, combined with the ever-increasing growth and dominance of niche beauty brands, can explain the importance of increased diversity and representation of London-based brands. Consistent awareness of the changing socio-cultural makeup of London is evident by the updates to the global brand ambassadors chosen to represent the brand to global audiences. This echoes David Harvey's idea of "conditional permancies" (1996 p.293) wherein the version of representation shown in the branding of beauty brands may only temporarily represent the city because of the constant dynamic cultural flux evident in London.

The mechanisms of "accumulation, competition, differentiation and innovation" (Pike, 2015 p.197) force branding actors in spatial circuits to develop, exploit and reproduce socio-economic differences over time and place. While appearing to be more diverse and representative to consumers, studying the annual reports highlights the "mystical veil" (Greenberg, 2008 p.31) of representation brands are trying to pull to increase competitiveness on the global scale. Through discussions and research around global supply chains, it's readily perceived that brands choose to focus on the political-economic issues of capital accumulation and competition rather than the socio-cultural representation of the brand due to global competition on price and product efficacy.

How are London-based beauty brands competing on a global scale?

Furthering the notion of retaining competitiveness and innovation within spatial circuits, the rise of traditionally producer-based economies in tandem with London-based brands and the increasing demand for beauty in Asia-Pacific as evident in Iconic London's 2021 Financial Statement report highlights the instability of a London-based brand. The differing cultural-economic tendencies of global shoppers has meant brands can no longer rely on their Western location as a tool for popularity and carrier of quality. The "dynamic economic rationales" (Pike, 2015 p.196) evident in global beauty markets indicates the need for London-based brands to innovate and differentiate to fulfil profit-making ambitions rather than rely on their location-based branding.

To conclude, the geographies of London-based beauty brands and their locational associations are both fixed and temporary in time and space as a result of specific actors within the beauty landscape. The everchanging and fluid geographical associations to London is evident by the differing associations to the city utilised, whether intentional or not, by the three beauty brands analysed in this research. This flexibility of locational associations is not so much controlled by the historic brands, but rather the rise of arguably individually 'niche' brands who launched in the last decade, shaping their own version of origination. Yet, with these beauty brands being the "avant-garde of the capitalist quest" and "spearheading an invasion of culture" (Kornberger, 2010 p.205) branding actors could be utilising their origination to further spread Western ideals. This "invasion of culture" (ibid) is arguably reminiscent of the colonialist quest for occidental beauty, with global brands carrying

the London branding transferring the underlying notion of Western beauty ideals. Finally, although branding actors frequently pursue shortcut and reductionist simplification of space, cities such as London are not merely reducible to a simple 'COO' brand due to their multi-faceted and diverse spatial structures.

5.2 Reflection on methodology and further research:

This research identified the global industry of beauty and, using a deductive methodological approach, cross-examined the findings to the theory of Andy Pike's research, 'Origination: The Geographies of Brands and Branding' (2015) and other key literature. Research aiming to explore the theoretical grounding further could utilise an inductive approach to analysis with another global industry, "drawing directly on the data itself [...] independent of any preconceived theories (Peters, 2017 p.169) to articulate and understand the sheer complexity of this geographical phenomena. As Klein (2000) notes, research into the geographies of brands and branding can allow a "non-abstract starting point" (p.356) for further studies into the relationship between spatial associations and socio-cultural justice. Further research could centre on who and where wins or loses from geographical origination. This could be framed politically, economically, socially, or culturally from investigation into other global industries. Cross-comparison of further research on global industries with this study on the beauty industry can contribute to further academic discourse on the interplay between geographical associations and origination, socio-cultural representation and the growing complexity and superdiversity of modern cities, rather than simply the national level.

Word Count: **10,000**

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