

Changes in Chinese Consumers' Perception toward Korean Apparel Products: A Longitudinal Study

Haekyung Yu[†]

Dept. of Fashion Industry, University of Incheon

한국산의류제품에 대한 중국소비자의 인식 변화: 종단적 연구

유 혜 경[†]

인천대학교 패션산업학과

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Abstract

The main objective of this study was to examine how Chinese consumers' perceptions toward Korean apparel products have changed over the years. Specifically, motives for purchasing Korean apparel products, information sources, purchase criteria and evaluation on Korean apparel products were investigated. Data were collected in 2002, 2003, 2005, and 2007 from young female Chinese in Beijing, China during the months of June and July. A total of 603 questionnaires were collected and 578 were used in the final analysis. The results of two-way analysis of variance by year and purchase experience indicated that in overall, purchase motives and importance of various information sources changed greatly over the years, while evaluation on Korean apparel products have remained relatively stable. In comparison to the longitudinal changes in Chinese perception toward Korean apparel products, Chinese consumers' perception toward Korean apparel products did not differ significantly in most of variables according to purchase experience.

Key words: Korean apparel products, Chinese consumers, Purchase criteria, Evaluation on Korean apparel products; 한국산의류, 중국소비자, 구매동기, 한국산의류 평가

I. Introduction

With over 1.3 billion population and fast economic growth, China is the largest consumer market that attracts attention from all around the world(Ahmed & d'Astous, 2004). Close ties between Korea and China have persisted throughout the long history due to geographical proximity. After the cold war era, two countries resumed formal diplomatic relations in 1992 and ever since then China has been a very important trading partner to Korea. Korea's direct

investment to China increased from 170 cases in 1992 to 2,149 in 2004, and China accounted for 57.1% of Korea's total foreign investment in terms of the number of projects(Kim & Mah, 2006). And among all manufacturing and service sectors, textiles and clothing is the largest investor accounting for 16.3% of Korean investment projects made in China in 2004(Kim & Mah, 2006).

Korean clothing and textile companies started to explore China with indirect investment through Hong Kong in the late 1980's. In early 1990's many Korean companies took interests in China for outsourcing labor-intensive manufacturing process benefitting from low wages as well as eliminating low-end out-of-sea-

[†]Corresponding author

E-mail: yuhkyung@incheon.ac.kr

son merchandises (Park & Zhang, 2005b). However, after the financial crisis in Korea in 1998, Korean apparel companies have been pursuing aggressive expansion strategies in the fast-growing Chinese consumer market. By 2000, China became a very attractive consumer market with high economic growth, and as China joined WTO business conditions in China became more favorable for foreign companies (Kim, 2007a). Some Korean brands such as On & On and Wolsey in early 2000's showed surprising sales record, which encouraged entries of other Korean brands. Consequently, unlike in early 90's, Korean apparel products have become diversified in terms of brand, price and merchandise category. In 2006, 1200 Korean apparel companies including 76 high-end brands were doing business in China (KITA, 2007). In particular, expansion of Korean apparel companies in Chinese market was spurred by anticipation of Beijing summer Olympic games. In July 2008, seven Korean brands reported to have more than 100 retail outlets in China ("Seven Korean brands", 2008). Basic House had 215 stores and E-Land Kids with 200 stores. Other brands-Twin Kids, Eblin, Paw in Paw, Rapido and EXR- had between 100 and 200 stores.

In spite of increasing expansion efforts of Korean apparel companies, success rate is known to be fairly low around 10% (Kim, 2007a), and only ten out of 80 Korean fashion companies who entered in China are making profits ("Drowned in debts", 2008). Low success rate of Korean apparel companies marketing in China suggests it is imperative to have better understanding of Chinese consumers and society in order to compete successfully against well known global brands as well as local brands in Chinese market.

As China has become a major consumer market with great potential, many researchers in different fields have examined Chinese consumers from various perspectives. And a good number of studies, particularly by Korean scholars, focused on Chinese apparel market due the importance of China as a consumer market and a sourcing region for Korean apparel companies. Some have examined the strategies of Korean apparel companies marketing in China (Kim, 2007a; Koh & Song, 2004; Koh & Suh,

2003). Several studies examined characteristics of Chinese apparel consumers (Kim, 2003), or attempted to segment the market (for example, Park & Zhang, 2005a; Shen & Yu, 2002). In recent years, Chinese consumers' attitudes and buying intentions of Korean apparel have been examined in relation to the level of Chinese sensitivity to "Korean wave" (Jung, 2006).

Even though previous studies examined various aspects of Chinese apparel consumers, very few researchers attempted to investigate how Chinese consumers actually feel about Korean apparel products. Therefore, it is necessary to investigate Chinese consumers' perception toward apparel products marketed by Korean companies in order to provide in-depth information needed for Korean apparel companies in developing successful strategies. Furthermore, it would be of great interests if we could learn how the perceptions and attitudes of Chinese consumers toward Korean apparel products have changed over the years, since Chinese society as well as market conditions have been changing rapidly.

Therefore, the main purpose of this study was to examine the changes in Chinese consumers' perception toward Korean apparel products over the years in order to provide in-depth information on Chinese apparel market. Specifically, this study examined changes in Chinese consumers' motives for purchasing Korean apparel products, and importance of information sources and purchase criteria, and evaluation on Korean apparel products from 2002 to 2007 by collecting data in 2002, 2003, 2005, and 2007 in Beijing, China. Purchase experience of Korean apparel products was included as a moderating variable which may have significant effects on Chinese' perception toward Korean apparel products. In this research, Korean apparel products refer to all apparel brands designed or marketed by Korean apparel companies regardless of country of manufacturing. The results of this study will be helpful in developing successful marketing strategies for Korean apparel companies interested in Chinese market. The study also has some academic importance thanks to its longitudinal data considering lack of longitudinal studies in marketing area.

II. Research Background

1. Apparel Market in China

As China's economic conditions have been developing with influx of western culture, apparel market in China has expanded and become sophisticated. The total sales of clothing in China was approximately 67.9 billion US dollars in 2004, and is estimated to grow to 112.63 billion US dollars in 2012(Kim, 2008). It is reported that the Chinese market has grown with over 10% annual rate on average(Kim, 2007a).

The main targets of Korean apparel companies have been wealthy Chinese consumers who could afford high-end merchandises. These consumers are geographically concentrated in large urban areas surrounding Beijing, Shanghai, Guangzhou, Chengdu, and Harbin, while Shanghai, Beijing and Guangzhou are primary nodes of domestic production for Chinese apparel companies(Finnane, 2005). About 520 million, 40% of total population in China, reside in urban areas, and it is estimated that there are 100 million middle-class urbanites with 40,000 to 100,000 yuan annual income, and 5.2 million high-class Chinese with over 100,000 yuan annual income(Kim, 2008).

In Chinese apparel market, ladies' wear is the largest category accounting for approximately 35% percent of total market(Kim, 2008). Men's wear is the next largest category with 22% market share by 2003, but it is the fastest growing market with 0.9% annual growth rate since 2000(Kim, 2008). And Korean apparel companies in ladies wear and casual wear categories entered into Chinese market most aggressively(Koh & Song, 2004), but during the past few years Korean apparel companies expanded in China in all categories including children's wear("Seven Korean brands", 2008).

Even though most of Korean apparel companies took interests in China mainly for low cost of sewing at the beginning, over the years entry and expansion strategies of Korean companies have become diversified including direct investment, direct exports with own retail shops, exports as wholesaler, joint venture

and licensing(Kim, 2007a). Koh and Suh(2003) noted that need for market expansion due to saturated domestic market followed by low production cost was the most important motive for the companies going abroad. Kim(2008) suggested that in comparison to the early entry of Korean firms with direct commodity exports, supply process including design may be gradually transferred to China so that the apparel products and companies would be fully localized.

2. Characteristics of Chinese Consumers

As the economy of China has been developing rapidly, the country has emerged as an important consumer market with great potential. Consequently, a good number of researchers have investigated characteristics of Chinese consumers in general, and sometimes tried to compare the Chinese consumers to those in other countries.

Results of some studies provide lifestyles(Kim & Jia, 2005; Kim & Kim, 2000) or psychological characteristics of Chinese consumers(Dong, 2002). Other studies revealed that in spite of ongoing westernization, traditional culture of China such as collectivism, man-nature orientation, and *mianzi*(prestige face) have strong influence on Chinese consumers' green purchase behavior(Chan, 2001), interpretation of brand names(Eckhardt, & Houston, 2002; Li & Shooshtari, 2003), and attitudes toward global advertizing(Zhou & Belk, 2004). Gong(2003) also confirmed that collectivism as one of the core values in Chinese culture has impacts on each stage of Chinese consumer decision making process.

Some studies compared Chinese and Koreans in terms of their information search behavior(Choi et al., 2003; Yunzhe, 2002), the attitudes toward TV home shopping(Lee, 2004) and post-purchase behavior(Hwang et al., 2007). Jung and Hong(2006) reported that there was not much difference on preference of home appliance designs between Korean and Chinese.

In the past few years, Korean movies and TV dramas were aired in many Asian countries including China, and many Korean singers and movie stars gained great popularity. Some researchers tried to

investigate the influences of the spread of Korean popular culture, so-called Korean wave (Jung, 2006; Kim, 2002; Park, 2004). These studies confirmed positive relationship between influence of Korean wave and Chinese consumers' attitude to Korea or Korean products. The study of Kim (2002), in particular, showed that clothing and accessories were most frequently bought Korean products followed by CD and other consumer goods.

3. Chinese Apparel Consumers

A good number of studies dealt with Chinese apparel market from various perspectives, since China has become an important market for Korean apparel companies. Some researchers have focused on the characteristics of Korean apparel companies and their international marketing strategies expanding to Chinese market (Kim, 2007a; Koh, & Song, 2004; Koh & Suh, 2003).

But most of previous studies examined characteristics of Chinese consumers as related to apparel. Some conducted descriptive studies on overall characteristic of Chinese consumers in purchasing apparel products (Yu, 1998), brand loyalty (Lei, 2003), evaluation criteria for stores (Kim, 2005), and design preferences (Kim & Lee, 2001). Park and Zhang (2005a) tried to segment middle to high class Chinese women according to clothing purchase motives, while Shen and Yu (2002) used life style in segmenting Chinese college students. Some researchers examined purchase patterns according to clothing involvement (Lee et al., 2002), life style (Kim & Quli, 2006), and materialism (Kim, 2003). Kim et al. (2002) showed that experiential image was most important for brand-loyal female Chinese, while performance quality assurance was most important for Koreans in purchasing apparel.

In recent years, Chinese consumers' attitudes and buying intentions of Korean apparel have been examined in relation to the level of Chinese sensitivity to Korean wave. While the earlier study by Kim (2002) showed positive influence of Korean wave on fashion styles of Chinese young people, later study by Kim (2007b) reported lack of significant influence

of Korean wave on Chinese consumers' purchase of Korean apparel products. Park (2004) showed how styles of Korean entertainers as part of Korean wave were reflected in street fashion styles of Chinese young consumers.

Even though previous studies examined various aspects of Chinese apparel consumers, there are only a limited number of studies to show how Chinese consumers actually feel about Korean apparel products. Ahmed and d'Astous (2004) examined Chinese perceptions of countries as producers of T-shirts. They found that the mean rating on Korea was highest among NIC's, and better than Canada as country of design, and as country of assembly, Korea was perceived almost as good as Italy and France, following Japan, USA, and Germany. Their study showed that Chinese consumers have relatively favorable perception on Korean apparel products. In the study by Kim (2002), Chinese students responded that the most important reason for purchasing Korean fashion goods was design, followed by quality, price and influence of entertainers in descending order. Park and Zhang (2005b) reported that there were significant differences in several demographic and purchase related characteristics between Chinese who had experience in purchasing Korean apparel products and those who had not.

The results of previous studies on Chinese consumer market are somewhat scattered and have failed to provide consistent information on Chinese consumers in general or in apparel related behavior. Furthermore, studies on how Korean apparel products are perceived or evaluated in Chinese market are quite limited in spite of the fact that great number of Korean apparel companies have been struggling to succeed in China. Therefore, it would be very important to examine Chinese consumers' perception on Korean apparel products in order for Korean apparel companies to develop successful marketing strategies. Particularly, it would of great interests if we could learn how the perceptions and attitudes of Chinese consumers toward Korean apparel products have changed over the years, since there have been great changes in Chinese society as well as in the ways Korean apparel products are marketed in China.

III. Research Methods

1. Instruments

Even though there are many studies which included instruments measuring purchase motives, information sources, purchase criteria and evaluation, it was deemed important to develop instruments suitable for Chinese consumers. Therefore, open-end questions soliciting the responses concerning purchase motives, information sources, purchase criteria and evaluation on Korean apparel products were asked to 35 Chinese students studying in Korea during September, 2001. The questions were written in Chinese, and the responses were also made in Chinese. The results were tallied and based on these results and previous studies(Kim & Kim, 2001; Kim et al., 2001; Lim & Kim, 1999), instruments were constructed for survey questionnaire. Instruments for measuring motives for purchasing Korean apparel products contained 6 items. They were the responses to the question "Why and when would you buy Korean apparel products; because (1) I like the Korean apparel that other people are wearing, (2) I like the store display, (3) the Korean apparel products are up to fashion trend, (4) others advise me to buy them, (5) I like to have various of styles in clothes, and (6) the products were on sale. Information sources had 7 items, 8 items for purchase criteria, and 9 items for evaluation on Korean apparel products. All variables were measured in 5-point likert scale. In addition to these variables, the questionnaires included demographic variables, and other variables such as purchase experience of Korean apparel products, shopping place, and brand names. Before they were distributed in China, the questionnaires were administered to 13 Chinese for pre-test. The same questionnaires were used throughout the research period.

2. Data Collection and Methods of Analysis

Data were collected in 2002, 2003, 2005, and 2007 during the months of June and July. Questionnaires were collected from young female Chinese who were shopping in the downtown shopping districts of Beijing such as Wangfuzing, Sidan, and Seito depart-

ment store, and other areas popular for young Chinese including the streets nearby Beijing University. Young female Chinese were approached and asked to respond to the questionnaires. Due to difficulty in collecting data, data were collected every other year after 2003. However, it was deemed the data could still show the changes in the Chinese perception on Korean apparel products. A total of 603 questionnaires were collected(141 in 2002, 153 in 2003, 149 in 2005, and 160 in 2007) and 578 were used in the final analysis. Two-way analysis of variance with year, purchase experience and interaction terms was conducted on each item of the variables. Interaction terms were significant in none of the models, and therefore results are presented only for year and purchase experience.

<Table 1> shows the respondent profile. 52.5% of the respondents had purchased Korean apparel products. 95.9% of them were younger than 30 years old, 10.5% were married and 91.7 % had higher than high school education. 49.0% of the respondents were college students, and 38.0% were professionals, office workers or technicians.

IV. Results and Discussion

1. Motives for Purchasing Korean Apparel Products

<Table 2> shows the results of two-way analysis of variance on motives for purchasing Korean apparel products by year and purchase experience. The effect of year was significant in all items of the motives except store display. This result indicates that in overall, motives for purchasing Korean apparel products have greatly changed over the years. Purchase experience was also significant for fashionability and peer advice, which suggest that importance of fashionability and peer advice as motives for purchasing Korean apparel products not only have changed over the years but also purchasers differ significantly from non-purchasers in terms of these variables. On the other hand, only purchase experience was significant for store display indicating no longitudinal change in the motive of store display.

Table 1. Characteristics of respondents

Variables	2002		2003		2005		2007		Total	
<Age>										
Younger than 21 years old	3	(2.1)	83	(56.5)	28	(19.6)	7	(4.7)	121	(20.9)
21~25 years old	69	(48.9)	37	(25.2)	75	(57.4)	115	(77.2)	296	(51.0)
26~30 years old	66	(46.8)	21	(14.3)	28	(19.6)	24	(16.1)	139	(24.0)
Over 30 years old	3	(2.1)	6	(4.1)	12	(8.4)	3	(2.0)	24	(4.1)
<Marital Status>										
Married	16	(11.3)	22	(14.7)	21	(14.7)	2	(1.3)	61	(10.5)
Unmarried	125	(88.7)	128	(85.3)	122	(85.3)	147	(98.7)	522	(89.5)
<Education>										
High school education or less	23	(16.3)	10	(6.6)	16	(11.1)	0	(0.0)	49	(8.3)
College education	118	(83.7)	139	(92.1)	116	(80.6)	148	(98.0)	521	(88.8)
Graduate school or more	0	(0.0)	2	(1.3)	12	(8.3)	3	(2.0)	17	(2.9)
<Occupation>										
College students	47	(33.3)	93	(62.4)	59	(43.1)	82	(55.8)	281	(49.0)
Office worker	29	(20.6)	30	(20.1)	30	(21.9)	25	(17.0)	114	(19.9)
Professionals	21	(14.9)	8	(5.4)	13	(9.5)	12	(8.2)	54	(9.4)
Engineer/Technician	7	(5.0)	7	(4.7)	20	(14.6)	16	(10.9)	50	(8.7)
Service/Sales	15	(10.6)	7	(4.7)	9	(6.6)	9	(6.1)	40	(7.0)
Others	22	(15.6)	4	(2.6)	6	(4.4)	3	(2.0)	35	(5.1)
<Monthly Income>										
Less than 2,000 yuan	52	(37.7)	96	(64.4)	61	(46.2)	84	(56.4)	293	(51.5)
2,000~3,500 yuan	24	(17.4)	27	(18.1)	36	(27.3)	26	(17.4)	113	(19.9)
3,500~5,000 yuan	43	(31.2)	11	(7.4)	22	(16.7)	28	(18.8)	104	(18.3)
5,000 yuan or more	19	(13.8)	15	(10.1)	13	(9.8)	11	(7.4)	58	(10.2)
<Purchase experience>										
Yes	54	(38.3)	81	(54.4)	84	(59.6)	85	(57.4)	304	(52.5)
No	87	(61.7)	68	(45.6)	57	(40.4)	63	(42.6)	275	(47.5)

Frequencies(percentage)

Table 2. Results of MANOVA on motives by year and purchase experience(F-values)

Motives	Model	Year	Purchase experience
Looking at others	875.163***	16.612***	1.219
Store display	1118.621***	2.518	7.432**
Fashionability	897.494***	3.358*	16.133**
Peer advice	525.129***	4.827**	10.464**
Seeking for variety	436.563***	4.888**	2.254
On sale	461.286***	5.973**	2.307

*** $p < .001$, ** $p < .01$, * $p < .05$

Results of Duncan tests on the motives which significantly differed by year and purchase experience are presented in <Table 3>. <Table 3> shows that

“looking at others” became stronger motives for purchasing Korean apparel products over the years, particularly in 2007. This result seems to indicate the

effects of Korean wave as well as increased availability of Korean apparel products in China. "Seeking for variety" was stronger motive for purchasing Korean apparel products only in 2007 compared to earlier years, whereas importance of on sale remained stable after 2002.

<Table 3> also shows the mean scores of motives which differed significantly by year and purchase experience. Importance of fashionability as a motive for purchasing Korean apparel products increased over the years in both purchasers and non-purchasers. At the same time, fashionability was stronger in purchasers than non-purchasers suggesting importance of fashionability in purchasing Korean apparel products. This result also indicates that Chinese consumers view Korean apparel products are up to world-wide fashion trend. This result suggesting the importance of fashionability in Korean apparel products is consistent with the Kim's(2002) study which showed the design was the most important reason to purchase Korean fashion goods. The importance of

peer advice was stronger in purchasers than non-purchasers and increased over the years. This result suggests that peer influence on Chinese consumers is stronger when they purchase Korean apparel products. Importance of the motive for store display varied significantly by purchase experience, but not year. Mean score on store display as motive for purchasing Korean apparel products was 3.40 for purchasers and 3.14 for non-purchasers. The result indicates that store display has been important, throughout the period, in motivating Chinese women to purchase Korean apparel products.

2. Information Sources

In two-way ANOVA on information sources by year and purchase experience<Table 4>, the effects of year was significant in magazine/newspaper, TV/radio, entertainers, friends and catalogs/pamphlets. These results indicate that while the importance of magazine/newspaper, TV/radio, entertainers, friends and catalogs/pam-

Table 3. Results of Duncan tests on motives by year and purchase experience(mean values)

Motives for purchasing Korean apparel products		Year			
		2002	2003	2005	2007
Looking at others		2.71a	3.23b	3.25b	3.55c
Seeking for variety		2.53a	2.63a	2.67a	3.04b
On sale		1.94a	2.26b	2.32b	2.44b
Fashionability	Purchaser	2.96a	3.06a	3.23a	3.49b
	Non-purchaser	2.71a	2.87a	2.92a	2.89a
Peer advice	Purchaser	2.29a	2.58ab	2.56ab	2.90b
	Non-purchaser	2.08a	2.59a	2.19ab	2.33ab

Different characters denote significant differences in mean values at $p < .05$.

Table 4. Results of MANOVA on importance of information sources by year and purchase experience(F-values)

Information sources	Model	Year	Purchase experience
Magazine/newspaper	767.370***	6.887***	4.404*
TV/Radio	665.073***	6.711***	2.512
Entertainers	586.039***	21.366***	0.253
Store display	1051.002***	0.553	0.839
Sales people	553.502***	1.015	0.533
Friends	984.234***	8.846***	3.112
Catalogs/pamphlets	516.542***	6.768***	1.178

*** $p < .001$, ** $p < .01$, * $p < .05$

phlets have changed over the years, importance of store display and sales people have not. The results showing that the importance of store display and sales people as information sources did not change over the period seem to indicate that VMD and sales strategies of Korean apparel companies have not changed significant enough to have induced different perceptions from Chinese consumers in these respects. The effect of purchase experience was significant only for magazine/newspaper.

The results of Duncan test in <Table 5> shows that importance of TV/radio, and friends as information sources significantly increased in 2003 compared to 2002, and then 2007. Importance of entertainers as an information source also increased significantly over the years. Increasing importance of TV/radio and entertainers suggests effects of Korean wave particularly in 2007. Catalogs/pamphlets became more important from 2005 compared to earlier years, which may indicate that more Korean apparel companies started to distribute catalogs and pamphlets in 2005.

Importance of magazine/newspaper as information sources significantly increased after 2002, but remained stable afterwards in the case of purchasers, but for non-purchasers the importance of magazine/newspaper did not change over the years. In overall, the purchasers placed higher importance on magazine/newspaper than non-purchasers. Non-purchasers may not be diligent magazine/newspaper readers as much as purchasers.

3. Purchase Criteria for Korean Apparel Products

<Table 6> shows that among the purchase criteria for Korean apparel products, brand name, design, comfort, and service changed significantly by year, while quality, coordination with other outfit, and price did not. These results seem to indicate that quality, price and ease of coordination of Korean apparel product marketed in China did not change much over the period. On the other hand, fashion-

Table 5. Results of Duncan tests on importance of information sources by year and purchase experience(mean values)

Information sources	Year				
	2002	2003	2005	2007	
Entertainers	2.30a	2.41ab	2.62b	3.15c	
TV/radio	2.54a	2.91b	3.05bc	3.20c	
Friends	2.78a	3.13b	3.17bc	3.34c	
Catalogs/Pamphlets	2.24a	2.29a	2.55b	2.70b	
Magazine/newspaper	Purchaser	2.67a	3.17b	3.22b	3.51b
	Non-purchaser	2.76a	2.95a	2.96a	3.11a

Different characters denote significant differences in mean values at $p < .05$.

Table 6. Results of MANOVA on importance of purchase criteria by year and purchase experience(F-values)

Purchase criteria	Model	Year	Purchase experience
Brand name	500.793***	4.551**	0.003
Quality	1433.030***	2.212	1.849
Design	1816.737***	4.074**	1.314
Comfort	1565.379***	4.478**	0.253
Fashionability	1778.474***	2.829*	5.400*
Coordination with other outfit	1598.661***	1.323	1.982
Price	1151.336***	0.920	1.796
Service(alteration, refund)	623.192***	3.014* ¹	3.091

*** $p < .001$, ** $p < .01$, * $p < .05$

ability varied both by year and purchase experience.

<Table 7> shows that the importance of brand name increased significantly in 2007. This result may be attributed to the efforts of Korean apparel companies marketing high-end brands in the last few years. In overall the importance of design, comfort, and service as purchase criteria increased over the years especially in 2007 as compared to 2002. Mean scores of importance of fashionability in <Table 7> show that purchasers place higher importance on fashionability in purchasing Korean apparel products than non-purchasers, even though the importance of fashionability increased over the years in both purchasers and non-purchasers. The significance of fashionability as purchase criteria for Korean apparel products seems related to the importance of fashionability as a motive for purchasing Korean apparel products. Both results are consistent in suggesting fashionability is very important and distinctive characteristic of Korean apparel products in the minds of Chinese consumers.

4. Evaluation on Korean Apparel Products

The results of two-way ANOVA on evaluation on Korean apparel products are presented in <Table 8>. Evaluation on Korean apparel product in terms of price, design/color, and sales people changed significantly by year, while there were no significant effects of quality, store/window display, alteration service, brand image, shopping bags/pamphlets, and store prestige. These results suggest that Chinese consumers' evaluation on Korean apparel products did not change much since 2002 except in price, design/color, and sales people. Purchase experience had significant effects in evaluation on store prestige.

<Table 9> shows that evaluation on price of Korean apparel products increased continuously over the years. This result may be attributed to the fact that price ranges of Korean apparel product marketed in China have been widened over the years. It is also possible that Chinese consumers became less resis-

Table 7. Results of Duncan tests on importance of purchase criteria by year and purchase experience(mean values)

Purchase criteria		Year			
		2002	2003	2005	2007
Brand name		2.28a	2.39a	2.47a	2.71b
Design		3.70a	3.73a	3.92b	4.01b
Comfort		3.53a	3.61ab	3.74b	3.77b
Service(alteration, refund)		2.83a	2.97ab	3.01ab	3.19b
Fashionability	Purchaser	3.58a	3.89ab	3.80ab	3.95b
	Non-purchaser	3.72b	3.80b	3.36a	3.66b

Different characters denote significant differences in mean values at $p < .05$.

Table 8. Results of MANOVA on evaluation on Korean apparel by year and purchase experience(F-values)

Evaluation	Model	Year	Purchase experience
Price	733.395***	8.432***	0.754
Quality	896.164***	0.636	2.867
Design/color	1645.177***	5.621**	1.368
Sales people	746.401***	2.816*	0.009
Store/widow display	972.596***	0.485	0.124
Alteration service	663.443***	0.588	0.339
Brand image	771.265***	1.580	1.857
Shopping bags/pamphlets	630.437***	0.082	1.645
Store prestige	702.759***	0.654	3.962**

*** $p < .001$, ** $p < .01$, * $p < .05$

Table 9. Results of Duncan tests on evaluation on Korean apparel by year and purchase experience(mean values)

Evaluation	Year			
	2002	2003	2005	2007
Price	2.57a	2.75ab	2.86b	3.11c
Design/color	3.45a	3.64b	3.78b	3.79b
Sales people	2.84a	2.88a	2.94a	3.17a

Different characters denote significant differences in mean values at $p < .05$.

tant to relatively high prices of Korean apparel products as Chinese economy has developed. Evaluation on design/color increased significantly from 2002 to 2003, but remained stable afterwards. This result indicates that Chinese consumers did not feel design/color of Korean apparel products have improved in the past few years. Year was significant in the analysis of variance on evaluation on sales people, but the results of Duncan test show no significant differences. This result seems consistent with the earlier result showing that the importance of sales people as an information source did not change over the years. Evaluation on store prestige was higher for the respondents who had purchased Korean apparel products (2.96) than those who had not (2.75). This result is not surprising since Chinese consumers who had purchased Korean apparel products would feel that the stores they made the purchases from are more prestigious than those who did not.

V. Conclusions and Limitations

This study investigated how Chinese consumers' perception and attitude toward Korean apparel products have changed from 2002 to 2007. The results showed that motives for purchasing Korean apparel products, importance of information sources and purchase criteria have changed over the period from 2002 to 2007 in many aspects. In overall, there were notable changes between 2002 and 2003, and then again between 2005 and 2007. In particular, purchase motives, except store display, have increased over the years indicating that Chinese became more strongly motivated to purchase Korean apparel products. These results seemed to suggest increasing appeal of Korean apparel products as the increasing number of Korean apparel companies and apparel brands are

marketed in China. The results also may be attributed to the influence of Korean wave in China. The possible influence of Korean wave for Chinese apparel consumers was also detected in the increased importance of magazine, TV/radio and entertainers as information sources in purchasing Korean apparel products.

While Chinese perceptions and attitudes toward Korean apparel products changed significantly in a number of aspects over the period, purchase experience was not significant in differentiating Chinese perception on Korean apparel products except for a few cases. These results suggest that Chinese consumers' perception and attitudes toward Korean apparel products are fairly unanimous regardless of their experience with Korean apparel products, even though Korean apparel products have gone through great changes in Chinese market. Fashionability has been a strong motive for purchasing Korean apparel products, and its presence has increased over the years. Importance of fashionability as purchase criteria also increased over the years and purchasers placed higher importance on fashionability than non-purchasers suggesting that the Chinese consumers who place higher importance on fashionability are more likely to purchase Korean apparel products. These results suggest that fashionability is a key factor for competitiveness of Korean apparel products. Therefore, fashionability should be emphasized for Korean apparel companies in developing successful marketing strategies. Given the importance of fashionability, it is alarming that evaluation on design/color of Korean apparel products did not increase after 2003, and furthermore, it did not differ significantly between purchasers and non-purchasers. These results suggest that Korean apparel companies should pay greater attention to meet the Chinese consumers' needs for better design/color incorporating fashionability.

It should be pointed that importance of quality, coordination with other outfit, and price as purchase criteria did not change significantly over the years. The importance of other purchase criteria such as brand name, comfort, fashionability, service changed over the years, but the changes were not as prevalent as in the cases of purchase motives, and importance of information sources. This result seems reasonable though, since purchase criteria of consumers may not change as much as their motives or information sources for purchasing specific products such as Korean apparels.

Evaluation on Korean apparel products did not change significantly except for price, and design/color. Even for design/color, evaluation has not changed significantly since 2003. Thus, it could be concluded that in spite of increased number of Korean companies and diverse marketing practices Chinese perception toward Korean apparel products have not improved greatly.

On the other hand, it is interesting that evaluation on price of Korean apparel products has improved over the years in the light of relatively high price of Korean apparel products in Chinese market. This may indicate that Chinese consumers have become more tolerant to relatively high price of Korean apparel products as Chinese economy has developed. At the same time, this result may be attributed to the fact that Korean apparel products in wide price range have become available in China.

The results of this study provide some implication that may help Korean apparel companies marketing in China. First of all, fashionability and peer advice were important motives for purchasing Korean apparel products. Thus Korean companies should pay attention to provide fashionable products to Chinese consumers as well as to increase the promotion activities strengthening on word-of-mouth effect. It should be pointed that the importance of store display as a motive for purchasing Korean apparel products has not changed over the years. Nowadays, many world-class brands are competing in Chinese market. Therefore, Korean apparel companies should place more importance on their store display to strengthen their competitiveness. If Korean apparel companies

work as wholesaler with Chinese retail partners, they should attempt to have some control over the retail VMD so that store display may be consistent with the image of products or companies.

Second, magazine/newspaper has become more important source of information for Korean apparel products over the years, and Chinese who purchased Korean apparel products placed higher importance on magazines/newspapers than non-purchasers. Over the years, many new magazines have been introduced in China. It seems effective for Korean apparel companies to place advertisements in magazines. Korean apparel companies could also increase their visibility if the apparel products are introduced in magazine or newspaper articles.

Finally, it should be pointed that even though there have been significant changes in Chinese motives for purchasing Korean apparel products, evaluation on Korean apparel products in almost all aspects had not changed over the years. This result is somewhat alarming since it suggests that Chinese consumers do not feel that Korean apparel products have improved in product-related attributes such as quality and design/color, or service related aspects. Only the evaluation on price of Korean apparel products has become more favorable over the years, which seems to reflect the economic development of Chinese society. Therefore, it seems that Korean apparel companies should upgrade their merchandises as well as the services in all aspects with less concern over prices. Particularly, in view of importance of fashionability as a motive for purchasing Korean apparel products, Korean apparel companies should pay extra attention to provide stylish and trendy merchandises.

Even though this study provides insightful information on how the Chinese consumers' perceptions toward Korean apparel products have changed over the years, several limitations should be mentioned. First of all, small size of sample significantly limits generalizing the results. China is a vast market, and the sample size in this study is far too small to have conclusive results. Also, the data were collected only in Beijing while China is known to have vast regional differences. Furthermore even though random sampling method was attempted by collecting data from

Chinese consumers in shopping districts, the sampling method used in this research is not rigorous enough to guarantee randomness of sample data. In investigating the longitudinal changes in Chinese perception toward Korean apparel products, only purchase experience was included as a moderating variable. It is plausible that other variables such as income or clothing involvement are effective means in understanding the differences in Chinese consumers' perception toward Korean apparel products. Based on these limitations, future research should benefit from including larger sample encompassing different regions in China with more rigorous sampling frame, and other consumer characteristics besides purchase experience.

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요 약

이 연구에서는 주요 목적으로 중국소비자의 한국산의류제품에 대한 인식의 변화를 살피고자 하였다. 구체적으로 한국산의류를 구매할 때의 구매동기, 정보원, 구매기준과 한국산의류제품에 대한 평가를 조사하였다. 자료는 2002, 2003, 2005, 2007년 중국 북경의 젊은 여성을 대상으로 6월과 7월 중에 수집되었다. 총 603부의 설문지가 수집되었으며 그 중 578부가 최종분석에 사용되었다. 연도와 한국산의류구매경험을 포함한 이원변량분석을 실시한 결과, 전반적으로 구매동기와 여러 정보원의 중요도는 시간에 따라 상당히 변화하였으나 한국산의류제품에 대한 평가는 대부분 변하지 않은 것으로 나타났다. 이와 같은 시간에 따른 변화에 비하여, 중국소비자들의 한국산의류제품에 대한 인식은 구입경험에 따라 대부분의 변수에서 유의한 차이가 없는 것으로 나타났다.