

How the Korean Fashion Industry is Viewed by WWD USA

Yuri Lee[†] · Katalin Medvedev* · Patricia Hunt-Hurst* · Yun Jung Choi**

Dept of Clothing & Textiles, Seoul National University/

Research Institute of Human Ecology, Seoul National University

*Dept. of Textiles, Merchandising & Interiors, The University of Georgia

**Dept. of Clothing & Textiles, Seoul National University

미국 패션전문 일간지 WWD에 드러난 한국 패션산업에 대한 인식

이유리[†] · Katalin Medvedev* · Patricia Hunt-Hurst* · 최윤정**

서울대학교 의류학과/생활과학연구소

*Dept. of Textiles, Merchandising & Interiors, The University of Georgia

**서울대학교 의류학과

접수일(2008년 10월 20일), 수정일(2008년 11월 23일), 게재확정일(2008년 11월 28일)

Abstract

Although we know that images of a country or an industry are influential factors in product evaluation, there has been little discussion about the channels through which consumers form a country or an industry image. Guided by the assumption that the image of the Korean fashion industry conveyed through U.S. media will likely affect the evaluation of Korean fashion products, we decided to examine articles published between January 1998 and June 2008 in *Women's Wear Daily(WWD)*, a prestigious U.S. daily trade newspaper covering all aspects of the national and international fashion business. By using the keyword "Korean", we found 329 relevant articles. Through content analysis, we identified the aspects of the Korean fashion industry that have been considered salient to U.S. fashion media professionals. We set up categories based on the contents of the articles that discussed segments of the supply chain of the fashion industry. We found more comments on the Korean fashion industry as fiber and fabrics supplier or apparel manufacturer than in any other categories, which reflects that South Korea has been traditionally one of the most attractive sourcing countries for the U.S. fashion business. We identified significantly less coverage on the designing, branding, marketing, and retailing aspects of the Korean fashion industry. Due to economic boom in Korea, the country's fashion industry is recognized as having a highly fashion-conscious market that can afford the world's premium brands. However, the industry is viewed as being rather vulnerable to changes in the macro economic environment.

Key words: Korean, Fashion industry, WWD, Media effect, Content analysis; 한국, 패션산업, WWD, 매체효과, 내용분석

[†]Corresponding author

E-mail: yulee3@snu.ac.kr

This research was partly supported by a grant from the Seoul R&BD Program(10956) and by the Department of Textiles, Merchandising and Interiors at the University of Georgia.

I. Introduction

Since the 1960s, the textile and apparel industry in South Korea has been the nucleus for the nation's economic growth, accounting for a large portion of employment, GDP, and trade. In the 1960s and '70s,

the Korean textile and apparel industry was perceived internationally as a good source of original equipment manufacturers, fiber and fabrics suppliers for garment manufacturing, possessing abundant, high-quality labor at relatively low cost, making it one of the most attractive sourcing sites for buyers or brands in developed countries, such as the United States. The overall export of textiles and apparel products in the 1970s exceeded 30% of all national export (KOFOTI, 2008). Since the late 1980s the Korean textile and apparel industry has transformed itself into a genuine "fashion industry" by focusing on design, branding, marketing, and retailing to increase its competitiveness. This catapulted the industry into creating and leading world fashion trends. The structural change is attributed both to internal and external factors surrounding the industry. Internally, Korea's economic surge, the subsequent increase in its labor costs as well as an upgraded and Western consumer taste all exerted a major influence on this transformation. In terms of external changes, other developing countries such as China, Vietnam and India are replacing Korea as major suppliers of Western markets. Some of these countries are also taking a large portion of the market shares of the synthetic fiber and fabrics supply of world trade, in which Korea once had a comparative advantage. Primarily due to the economic crisis in the Asian region in the late 1990s, every company in the Korean fashion industry had to fight for survival. To remain standing amid global competition, the industry fostered capabilities in value-added activities that were not limited to assembly-line or generic material production.

Today, with the financial and administrative backing of the Seoul Metropolitan Government and the Korean National Government, the Korean fashion industry strives to be globally competitive (Eum, 2007; Ko & Suh, 2003). However, despite such efforts, few Korean fashion brands or designer names are recognized in major fashion centers, such as the U.S., France, the United Kingdom, and Italy. Park's (2004) interviews with fashion professionals in the UK revealed that no Korean fashion brand or fashion designer was noted by the interviewees, indicating that the visibility of the Korean fashion industry is very low. Naturally,

we should not lose sight of the fact that Korea only recently transformed itself into a Western style fashion business. However, the low visibility of its fashion industry calls for a careful examination of the effect of this fact on product evaluation. The U.S. and developed countries in Europe play the most significant role in directing fashion business worldwide. Therefore, how these countries view Korea is critical for the Korean fashion industry because their views will influence how mass consumers all over the world perceive Korea and its fashion products.

Several studies have examined the globalization of the Korean fashion business by quantitatively surveying the foreign market entry of Korean fashion firms, fashion brands, or designers (Cho & Lee, 2006; Kim & Park, 2001; Ko & Song, 2004; Moon, 2003; Son & Rhee, 2005). However, little has been reported on how the industry, overall, is perceived in foreign countries. One direct way of asking foreign respondents what they know about a country or matters related to the country is via questionnaires or interviews. But as Lee (2004) indicated, asking respondents for their opinions directly may not be effective if most of them do not have any first-hand experience of the country and the country has low public visibility. In such cases, the validity of research design may be in question and the implications of the findings may be very limited.

Media research is regarded as an indirect method that can help balance this vulnerability because mass media is closely related to public opinion. Scholars utilized a major U.S. daily newspaper, *The New York Times*, to examine U.S. perceptions of Korea, Koreans, and Korean food (Lee, 2004; Lee et al., 2007). Others have given attention to the effect of mass media on consumer attitude and behavior, in particular appearance management or body image as documented in fashion magazines (Eisend & Möller, 2007; Monro & Huon, 2005; Sypeck et al., 2004). Other studies recognized the important role fashion magazines play in women's socialization and social role change and conducted content analysis of the text and visuals in magazines (Adomaitis & Johnson, 2008; Nelson & Paek, 2007; Yu et al., 2001). Fashion magazines have also been used to examine cultural refer-

ences and attitudes (König, 2006; Kopnina, 2007).

A common assumption is that fashion mass media can be perceived as the voice of the fashion industry, and that fashion mass media simultaneously reflect and reinforce the audience's perceptions, beliefs, and behavior (Kopnina, 2007). From this we can infer that how the fashion media describe elements of the Korean fashion industry, such as its products, events, or leaders, will influence readers' perception of the industry. Furthermore, if readership includes professionals from the fashion business and academia, the ripple effect will likely be even higher. Despite this, little has been examined about the effect of the fashion media on readers' perceptions of a country's fashion industry. Although we know that foreignness in industry image or country image are influential factors in product evaluation, there has been little discussion about through which channels consumers form industry or country image. Klepp and Mossberg's (2005) study on country image effect concluded that discussions about the economic aspects of other countries show stronger involvement in business newspapers than national newspapers because a country's self-interest is more clearly defined in economic matters.

Our study, therefore, aims to provide an exploratory basis of how the image of the Korean fashion industry is being formed in the U.S., which is one of the leading fashion centers in the world. We examined a major U.S. fashion publication, *Women's Wear Daily* (*WWD*), between January 1998 and June 2008 for articles about the Korean fashion industry. This research will provide insight into how the industry is perceived in the United States and help us assess the potential influence of this evaluation on the competitiveness of Korean fashion products in the U.S. market.

II. Literature Review

1. Women's Wear Daily

WWD, published for the first time in 1910, is a daily trade newspaper specializing in international fashion business. Together with the *Daily News*

Record, which covers the men's wear sector, *WWD* is regarded as the finest and most aggressive trade paper (DeVries, 1998). As of May 2008, the daily circulation of *WWD* is 45,000. Its readership is over 168,000 and includes retailers, designers, manufacturers, marketers, financiers, Wall Street analysts, international moguls, media executives, advertising agencies, socialites, and people who are interested in the latest trends ("Women's Wear Daily", 2008). *WWD*'s website, wwd.com, was launched in 1998.

2. Industry Image and Product Evaluation

Consumers must evaluate a brand or products of a brand positively so that they can become competitive. Previous studies on product evaluation have examined influential precedents or moderators of product evaluation (Burmam et al., 2008; De Klerk & Lubbe, 2008). Burmam et al. (2008) classified influential factors of product evaluation into three types: internal, individual, and external. Internal factors refer to aspects related to brand identity under brand managers' control. Individual factors are linked to consumers who perceive the brand or products, and include consumer motivation and other characteristics. External factors are those that brand managers are not able to control, such as industry image or country image.

The fashion industry encompasses the textile industry, the apparel industry, the retailing sector and the end-use consumer market which corresponds to the supply chain of fashion products (Cetindamar et al., 2005; Jacobs, 2006). Given that the image of a fashion industry influences consumers' fashion product evaluation, influential factors are related to every member in the supply chain of the product, such as designers, designs, raw materials, labor and production, marketing, promotion, and retailing. Because end-use consumers' characteristics can also influence the streamlined supply chain, the size, demographics, or consumption patterns of the final market should also be taken into consideration in the evaluation of industry image (Lee & Kincade, 2003; Masson et al., 2007).

3. Country Image and Product Evaluation

An external factor that influences product evaluation is country image. Martin and Eroglu(1993) defined country image as "the total of all descriptive, inferential, and informational beliefs about a particular country"(p. 93). They stated that the image of a country is based on its objects, events, and people as well as political, cultural, and economic aspects. Several studies related to country image examined the match between product image and country image (PCI). For example, many people associate Switzerland with sophisticated, high quality watches; Japan or Germany with durable automobiles; and France or Italy with highly fashionable apparel. The existence of such stereotypical product-specific region images is evidence that there is a significant relationship between country image and product evaluation. Other studies focused on country in brand and product evaluation as it pertained to the country of origin (COO) effect. COO studies have revealed how foreignness affects consumers' decision making and that Country of Brand(COB) effect as a part of the COO effect(Ahmed & d'Astous, 2004; DeLong et al., 2002; Hulland, 1999; Kleppe et al., 2002; Roth & Romeo, 1992). Studies on PCI and COO share the common view that the formation of country image has multifaceted dimensions. Differences in country images are ascribed to variations in evaluation of multiple dimensions such as economic, political, cultural, technological, linguistic, historic, and geographic aspects (Mittelstaedt et al., 2004). Roth and Romeo(1992) found that when consumers perceive a higher country image based on several sub-dimensions(the country's innovativeness, design, prestige, and workmanship) in product evaluation, their purchase intention increases.

When studying the effect of country image on product evaluation attention should also be paid to consumer characteristics. Many studies indicate that consumers' previous knowledge of or familiarity with the country moderate the effect of country image (Gurhan-Canli & Maheswaran, 2000; Han, 1989; Hulland, 1999; Lee & Littrell, 2003). When consumers are not familiar with the actual product of a country,

the image of the country of origin creates a halo effect on brand attitude, implying that information about the country builds a new belief and, consequently, affects brand attitude(Han, 1989). Considering that people in the U.S. know very little about South Korea, except for the political situation related to North Korea(Lee, 2004), we can infer that the limited familiarity may create a halo effect when they evaluate Korean fashion products. Therefore, what information about Korea is delivered, or how that information is communicated through mass media, may influence the audience's opinion and beliefs about the country, which in turn will gradually affect people's product evaluation as well.

The image of the Korean fashion industry can be an important external factor that influences fashion product evaluation in foreign lands. Despite this, few studies have been concerned with the perception of objects, events, and relevant people of the Korean fashion industry. Our study focused on the economic aspect of country image, combining the effect of industry image and country image to assess the competitiveness of Korean fashion products in a foreign market.

4. Mass Media Effect on Public Perception

Wayne et al.(2004) studied whether U.S. audience perception of foreign nations varies according to TV coverage in the news. Their results show a clear relationship between media coverage of nations and the way individuals viewed those nations. The same study also claimed that negative affective attributes showed a clear effect on respondents, while positive and neutral affective attributes did not, implying that negative attributes delivered by the mass media can have a stronger effect on country image in the audience's minds. In another study on how Norway is perceived by France, UK, and Japan through newspaper articles(Kleppe & Mossberg, 2005), the authors concluded that the number, the depth, and the degree of engagement of the articles with Norway are correlated to whether Norway is regarded as significant to these countries. Based on these findings, we can infer that how significant Korea is to the U.S. politically,

economically, or from various other aspects, will determine the way the U.S. mass media will deliver information about Korea.

Many scholars have been interested in media effect on public opinion or how consumers form their attitude toward certain brands (Brewer & Gross, 2005; Chong & Druckman, 2007). Other studies found that when mass media covers a certain issue, the accessibility and applicability of that issue increases. However, they also emphasize that the magnitude of mass media effect on public opinion can vary according to previously accumulated information, knowledge, and long-term learning aptitude of the audience (Nabi, 2003; Scheufele, 2004; Weaver, 2007).

III. Methods

The study posed two research questions: 1) how many articles related to the Korean fashion industry were published in *WWD* between January 1998 and June 2008 and 2) what aspects of the Korean fashion industry have been exposed as salient in *WWD* in the past ten years?

This study quantitatively and qualitatively analyzed the content of articles published in *WWD* between January 1998 and June 2008. We used the official website of *WWD* to search for articles that contained meaningful information about the South Korean fashion industry. As a way of convenience sampling and to exclude simple lists or tables from this population, we limited our search to the word "Korean". We thought that using the adjective "Korean", instead of the noun "Korea", would bring us closer to cases when the word "Korean" was used as a meaningful descriptor or qualifier of a particular aspect or practice of the Korean fashion business.

Because the aim of this study was to examine the potential relationship between country, industry, and product evaluation, we only selected articles that either provided straightforward references to Korea itself or to products, events, and people that readers would directly associate with Korea. For example, although an article may have mentioned Korean fashion designer, Young Hee Lee, we did not include

it in our analysis unless it was explicitly stated that she was originally from Korea. At the same time, similarly to Lee (2004), we included indirect comments regarding the Korean fashion industry if we decided that they contained relevant information regarding the industry. For example, we included the article that contained the following information: "*Guatemala has 227 apparel factories, 60 accessories makers, 18 textile mills and employs about 131,000 workers in total. About 65 percent of the apparel companies are foreign owned, primarily by Korean investor...*" (*WWD*, February 19, 2002). From these sentences one can infer that the Korean fashion industry is heavily involved in apparel manufacturing in Guatemala.

First, we identified the number of articles that contained meaningful comments regarding the Korean fashion industry in *WWD* from January 1998 to June 2008. Additionally, we charted the longitudinal change in terms of the number of articles that were relevant for our study. To complement the quantitative analysis and in order to extract meaningful interpretation of the contents, next we classified pertinent articles according to categories that corresponded to the elements of the industry, which also encompassed the concept of market as discussed in the literature review. The coding of randomly selected 100 articles was carried out separately by two coders to assess inter-coder reliability. Based on the inter-coder reliability of .85, the remaining articles were coded by one coder.

Our categories included the fiber and fabrics sector, manufacturing, branding, apparel design, retailing, end-use consumer market, and others. By analyzing the articles based on these categories, we identified which aspects of the industry are salient and repeatedly exposed to the readership of *WWD*. Lastly, we analyzed all articles mentioning Korean-American fashion designers or fashion companies run by Korean-Americans, as well as the Korean community as fashion consumers in the U.S., because, as Lee (2004) indicated, people's perception of Korea in the U.S. is strongly influenced by their direct experience of Korean-Americans or companies proximate to them.

IV. Analysis of Results

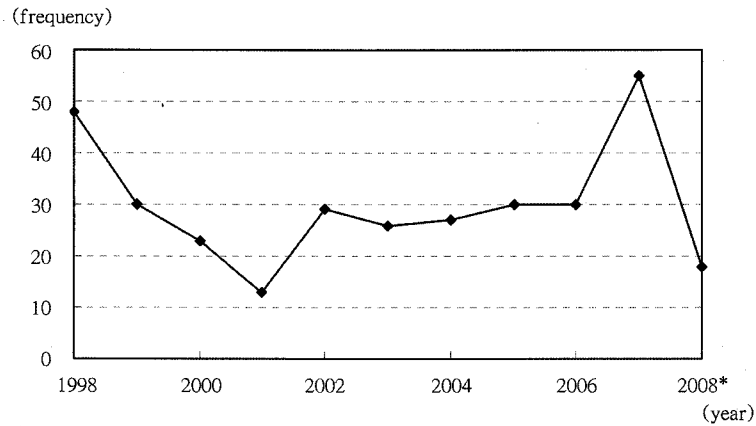
1. Article Selection

By using the keyword Korean, we identified a total of 439 articles posted on www.wwd.com between January 1998 and June 2008, 329 of these articles were relevant to the fashion industry. In our data set we included articles that referred to cosmetics and beauty products because these categories follow the trends of the fashion industry. <Fig. 1> shows the number of articles that were relevant to the Korean fashion industry each year. With 48 articles in 1998,

the amount decreased to 13 articles in 2001. After that, between 2001 and 2006, there appears to be little variation in the numbers, except for the 55 articles in 2007.

2. Analysis according to the Elements of the Industry

Based on pre-established categories (fiber and fabrics sector, manufacturing, branding, apparel design, retailing, end-use consumer market, and others), we analyzed the contents of the 329 articles. The quantitative results of this analysis are presented in <Table 1>.



*As of June 30, 2008

Fig. 1. Yearly change in the number of articles.

Table 1. The number of articles according to the elements of the industry

Year	Total	Production			Brand	Design	Wholesale Retail	Market	Others			
		Fiber/Fabric	Manufacturing	Both					Overall Industry	Supporter	Buyer	Others
1998	48	8	14		1			12	3	5	4	1
1999	30	11	7		1	3		7			1	
2000	23	9	2		1	4	1	6				
2001	13	3	5			2		3				
2002	29	6	9		2	3	4	4			1	
2003	26	6	3	1	2	8		5	1			
2004	27	5	7		2	6		4	1	1	1	
2005	30	9	2	3	3	3		4	2	1	1	2
2006	30	4	2	7	3	2	2	6	1		2	1
2007	55	9	4	4	19	3	2	10	2	2		
2008*	18	2	1		5	3	1	5	1			
total	329	72	56	15	39	37	10	66	11	9	10	4

*As of June 30, 2008

1) Korean Fashion Industry as Upstream Players

Korean companies were mentioned as a fiber or fabric manufacturer, supplying the international market, including the U.S., in 72 articles. A typical example of such communications is: “Buyers at the 10th annual Korean Preview textile show here last week” (WWD, September 12, 2006), and “South Korean fiber manufacturer Hyosung Corp. is trying to make inroads in the U.S. spandex market” (WWD, March 12, 2002). Articles mentioned textile shows sponsored or organized by Korean institutions, covered particular Korean companies that attended international textile fairs or exhibitions or entered a product into a foreign market. In these cases the textile sector of the Korean fashion industry is presented as salient and is repeatedly exposed to the readers.

We found 56 articles associated with apparel manufacturing, apparel product supply, or assembly operation management as shown by the following comments: “South Korea’s apparel shipments to the U.S. rose 32.5 percent in the first five months of this year to reach 139.35 million square meters equivalent. In this period, South Korea ranked as the U.S.’s 12th-largest supplier of imported apparel” (WWD, August 12, 1998). As this example demonstrates, Korea is still recognized as an attractive sourcing country for the U.S. Most of all, these articles showed that Korea’s participation in the globalization of production seems to be well recognized.

In 15 articles, Korean companies were viewed as important textiles and apparel suppliers of the U.S. or other international markets. The following statement is an example: “South Korea is the sixth largest apparel and textile exporter to the U.S., with shipments of 2 billion square meters equivalent, valued at \$1.8 billion, for the year ended March 31” (WWD, June 6, 2006).

2) Korean Fashion Industry as Downstream Players

We identified 39 articles that associated the word “Korean” with branding to the end-users. As shown by the following example, “Aioli Co., a \$100 million South Korea apparel maker, is revving up its U.S. profile in a prelude to an initial public offering.

...Aioli adopted a cautious but steady approach to expand Plastic Island’s retail base in the U.S...” (WWD, July 25, 2007), a Korean fashion brand, *Plastic Island*, is directly mentioned. It is rather disappointing that out of the 39 articles, 14 were about Korean cosmetics or beauty products. In other words, from January 1998 to June 2008, we identified only 25 articles related to Korean apparel brands. Three of the 25 articles discussed brands that were conceived in the U.S. by Korean-Americans. Overall, this number is significantly less than expected, considering all the effort that the Korean fashion industry has made involving branding.

One of the critical elements of the fashion industry is an individual or a party of people in charge of creative design. Out of 329 examined articles, 37 referred to Korean fashion designers, fashion design-related events, or objects. A typical example of this: “Since this city holds firmly to the conceit that it’s the center of the universe, it’s fitting that people from many parts of the world converge here for Fashion Week.... the Korean husband-and-wife duo, Hanii Y and Gene Kei, who are behind the Y & Kei label, turned out one of their strongest collections to date...” (WWD, September 22, 2003). In our data set 33 articles introduced Korean designers and their work, two reported about the Seoul Collection and two about the Seoul Fashion Week in Korea. In addition, one article covered “Concept Boutique” on Korean traditional costume design invited by the Paris *prêt-à-porter* collection. One article mentioned that a handbag designer, Hatgis, got his design inspiration from 19th century Korean textile products. In the other 22 articles, Korean fashion designers working in the U.S. or European countries such as the UK and France were introduced. Out of these 22 articles, Korean fashion designers, JiHaye, Y & Kei, and Young Hee Lee were featured in more than two articles. Out of the 33 articles on Korean designers, 11 were about Korean-American designers, such as Richard Chai.

We found only five articles about Korean retailing. The following is an example: “Foreign retailers continued to show interest in the Manhattan retail market... According to C & W executives, South Korean

retailers are also showing interest in entering the Manhattan market”(WWD, April 16, 2007). Overall, the limited number of articles suggests that little is known about Korean retailing among WWD readers. We also identified five articles about Korean-American owned retail and wholesale businesses. The following is an example about a retail store, Against All Odds: “Founded in 1995 by Korean-American Kenny Khym, Against All Odds... The retailer carries apparel brands such as Dickies, Coogi, Marc Ecko, G Unit, Lot 29 and Deréon, as well as accessories and footwear.”(WWD, June 26, 2008).

Opposite to the view that Korea is primarily a supplier, Korea is mentioned 66 times as the last member of a supply chain, an end-use consumer market, or a place where end-use consumers buy fashion products. This statement is an example, “PPR said Gucci performed exceptionally well in emerging markets, ...while South Korean sales gained 26 percent”(WWD, January 25, 2008). Articles that report annual gains or loss in profits of foreign premium brands, such as Prada, Gucci, and Louis Vuitton in the Korean market imply that WWD contributors view Korea as an important Asian market with relatively sizable consumption power. The articles that directly mention Korea as a significant market, together with articles that introduce plans of foreign brands to launch business in Korea, or discussions about the long relationship of foreign brands with Korean partner companies as well as news on terminating partnerships between foreign brands and Korean partners, indirectly suggest that Korea has a vital and dynamic market for fashion products. In three instances, WWD paid heed to the Korean-American community as a significant and growing ethnic market for fashion products, implying that Korean-Americans are viewed as possessing unique characteristics as a consumer group.

3) Other Aspects of the Korean Fashion Industry in WWD

Eleven articles included comments about Korea as part of the Asian market, following the Asian economic crisis in 1997, or mentioned the Korea-America Free Trade Agreement(FTA) negotiations, ongoing

since 2006. In these articles the Korean fashion industry is viewed as a whole, not its individual elements. The following example: “That means South Koreans can afford to buy U.S.-made goods. Imports from the country, however, concern U.S. textile groups..., especially since the South Korean industry also has capacity for some niche goods U.S. producers have targeted for production”(WWD, April 03, 2007), intimates that the Korean fashion industry is viewed from both supplier and demander perspectives. In addition, we found one article that reported Korean-Americans' active involvement in apparel manufacturing, wholesale, and retailing.

Korean fashion companies were mentioned in nine articles as supporters of a foreign designer, such as Martine Sitbon, who works in the U.S. Buyers from Korea attending various international textiles, garment, and other fashion-related fairs and exhibitions were mentioned in ten articles. These reports pointed out that the number of Korean buyers either increased or decreased in a specific exhibition. Another four articles included comments on a textile machinery company, a Korean golf player as a Nike model, and fashion model selection criteria.

<Table 1> presents the number of WWD articles, grouped by elements of the industry and reflecting annual change. It is worth noting that, initially, when the Korea-America FTA negotiations got underway, the Korean fashion industry was perceived primarily as a supplier of the U.S. At that point, U.S. delegates in the negotiations were highly concerned about the potential harm of the FTA to textiles and apparel production companies in the U.S. However, as the negotiation rounds advanced, a different view of Korea, that of an important market for U.S. fashion products, also emerged. In addition, in 1998, we also found many indirect comments about the shrinking of the Asian fashion market that included Korea. The effect of this was reported to be severe in the U.S. and Italy, as well as in other countries. Based on these comments, we can infer that the Korea had been a major country of production and consumption of fashion and had a close connection with the fashion business in many foreign countries at the time.

In addition, we traced more frequent mentions of

fashion brands that originated in Korea after the year 2000 than before. However, most of these references related to the cosmetics product sector and their absolute number is rather low compared to other elements we have discussed. The predominant view of the industry as a fiber and fabrics supplier is constantly reiterated throughout our research period. This implies that the Korean fashion industry is strongly associated with the textiles sector and that the perceptions of the Korean fashion industry mostly depend on the performance of this sector. While the surge of foreign premium brands in the Korean market in the late 1990s was noted, overall, we found that the dominant image of the Korean fashion industry remains to be that of a fabric supplier or apparel manufacturer. The promotional, branding, marketing, or retailing functions of the industry are less salient.

V. Summary of Findings and Implications

This study analyzed 329 articles posted on the website of the U.S. fashion industry trade paper, *WWD*, discussing various elements of the Korean fashion industry between January 1998 and June 2008. Guided by the assumption that the image of the Korean fashion industry conveyed through media communications will likely affect the evaluation of Korean fashion industry products, we assessed what view has been portrayed of the Korean fashion industry and the possible effects of this evaluation on its readership. Due to larger issues of the macro-economic environment surrounding the industry, such as the 1997 Asian economic crisis or the Korea-America FTA negotiations that started in 2006, we found more coverage on the Korean fashion industry in the years following these events, i.e. in 1998 and 2007.

First, we identified more comments about the Korean fashion industry as a fiber and fabrics supplier or apparel manufacturer than in any other categories. This reflects that South Korea has traditionally been one of the most attractive sourcing sites for the U.S. fashion business. This view must have been formed in the 1960s and 1970s when wages in Korea were very low. With the advent of the quota-free era in the 21st century, the Korean fashion industry is no longer

price-competitive, especially when compared to other Asian countries, such as China, which still has a low wage structure. Although the Korean fashion industry is meeting the challenge by adding creative fashion design, branding, and high quality, consumer-oriented retail service, it is still not clearly distinguished from low-wage Asian producers. Without increased awareness of the leading Korean fashion brands and a global appreciation of Korean designers, U.S. consumers cannot rely on the image of the Korean fashion industry as a positive halo effect to capture the uniqueness of Korean fashion products.

Making sure that a continuous coverage of Korean fiber and fabrics companies is being kept up in the mass media will also contribute to the positive evaluation of the Korean fashion industry. Now the textiles sector is required to summon every effort to make a successful transition to the next, advanced phase of production in which emotionally and technologically appealing, value-added textile products are created. All fashion industry sectors need to vigorously and strategically promote their new products, events, and practitioners to grab more attention in major foreign markets and to dispel the traditional stereotype of Korea as merely a low-wage supplier.

Secondly, we found that because of the economic surge in Korea, the Korean fashion industry is recognized as having a highly fashion-conscious market that can afford the world's premium brands. However, the industry is viewed as being rather vulnerable to changes in the macro-economic environment. An encouraging fact is that Korean cosmetics and beauty brands are actively promoted and covered in *WWD*. The positive image of these fashion product categories may create a synergistic effect on the Korean textile and apparel fashion industries.

Although not discussed in the result section, there was a noteworthy finding regarding Korean-Americans. We found 35 articles related to Korean-Americans. A direct or indirect experience with Korean-Americans appears to be effective in forming a positive image about the Korean fashion industry. If there are more Korean designers who are acculturated to the U.S. mainstream culture but are also able to retain their Korean cultural roots, the positive evalua-

tion of the Korean fashion industry and its products will likely increase. Considering the current trend that many Korean students leave for the U.S. to pursue careers in the fashion design or marketing sector of the global fashion business or enroll in leading U.S. fashion schools (Bae, 2008), we can prudently expect that the notion of "Korean" and creativity in fashion design will have a lot closer association in the global market in the future.

Additionally, we found nineteen articles that linked Korea to the "Korean War". Based on this, it is safe to conclude that, among many Americans, Korea is still associated with the tragic Korean War, which involved millions of U.S. servicemen and required significant restoration aid from the U.S. To our knowledge, no one has conducted an empirical study on the potential effect of this association on the image of the Korean fashion industry. In addition, other political or economic issues that present a concern to the U.S. and are covered by various mass media also influence the way the U.S. audience forms its image of Korea. How such issues affect the image of the Korean fashion industry will also need to be examined in a further study.

We have to be cautious in interpreting the results of this study because, instead of analyzing every article related to Korea, we only analyzed the articles that contained the word "Korean". Future research is necessary to establish who the actual readers of *WWD* are and to evaluate the extent of their word-of-mouth effect. Furthermore, the substantiality of media effect on consumers' perception should be investigated by obtaining primary data from consumers as well. The effect of negative messages should also be analyzed because they can exert a longer and stronger influence on perception than any other type of message (Wayne et al., 2004).

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요 약

국가와 산업의 이미지가 제품 평가에 영향을 미치고 있다는 것은 주지의 사실이지만, 그러한 영향력의 경로가 되는 매체에 관한 연구는 부족하다. 본 연구는 미국의 대중매체에 드러난 한국의 패션산업 이미지가 한국의 패션제품을 평가하는 데 영향을 미칠 것이라는 기본 가정하에, 한국 패션산업의 어떤 측면이 독자들에게 부각되고 있는지를 규명하고자 하였다. 미국의 명성 있는 패션전문 일간지인 *WWD(Women's Wear Daily)*를 선택하여 한국 패션산업과 관련된 내용분석을 시도하였다. 1998년 1월 1일부터 2008년 6월 30일까지 게재된 기사 중 “Korean”이라는 단어를 포함한 기사를 우선적으로 검색하고 패션분야와 관련된 기사 총 329개를 최종적으로 선택하여 분석하였다. 섬유공급망 관리 상의 역할별로 분석 범주를 설정하고, 한국 패션산업이 공급망 상에서 어떤 역할을 담당하는 주체로 부각되고 있는지 살펴 보았다. 그 결과, 한국의 패션산업은 섬유와 원단공급업자, 혹은 의류제조업자로서의 역할을 담당하는 것으로 인식되는 경우가 많았다. 이는 역사적으로 한국이 미국의 패션산업의 주요 소싱국가였던 이력을 반영하는 결과이다. 디자인, 브랜딩, 마케팅, 소매유통업을 담당하는 역할자로서 한국 패션산업을 바라보는 관점은 상대적으로 미약하였다. 또한, 한국 패션산업은 패션에 관심이 많고 세계의 유명 고가 브랜드 제품을 소비할 수 있는 의미 있는 시장을 보유하고 있는 것으로 높게 인식되고 있는 반면 한국 패션산업은 거시 경제의 환경 변화에 따라 경기변동을 겪는 취약점이 있음이 부각되기도 하였다.
