Investigating the tween girls fashion market in Melbourne: Opportunities for expansion and adaptation

A thesis submitted in fulfilment of the requirements for the degree of Master of Arts

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August 2008
Declaration

I certify that except where due acknowledgement has been made, the work is that of the author alone; the work has not been submitted previously, in whole or in part, to qualify for any other academic award; the content of the thesis is the result of work which has been carried out since the official commencement date of the approved research program; and, any editorial work, paid or unpaid, carried out by a third party is acknowledged.

Yukako Tomari

14/01/2009
Acknowledgements

There are many people who have generously given of their time, knowledge and expertise for this research. This research could not have been written without my supervisor, Mr. Mick Peel, who not only served as my supervisor but also encouraged and challenged me throughout my research. He and the other faculty members, my second supervisor, Ms Denise Sprynskyj, Ms Robyn Healy and Mr. Peter Allan, patiently guided me through the dissertation process, never accepting less than my best efforts. I thank them all.

I would like to make special note of members at the Francis Bourke Centre. I would also like to thank staff at the Study and Learning Centre at RMIT for assisting me in various ways during the research.

Thank you too, to my interviewees whose knowledge, expertise and insight have made this research possible.

I would also like to thank Kate Pears, Lisa Vong and Maryanne Barclay who assisted me and offered many helpful editorial suggestions in writing the thesis.

Sincere thanks to Anna Barclay, Barry Gorman, Noriko Kusano, Kozumi Miya, all my other friends and my family, who have been patient, understanding, encouraging and supporting.
## Table of the contents

In Summary.........................................................................................................................1

1. Introduction.....................................................................................................................2
1.2. Significance of the research......................................................................................2
1.3. Background to the research....................................................................................4
1.4. Research Objectives ...............................................................................................7
1.5. Research Methodology.............................................................................................9
1.5.2. Literature review .................................................................................................9
1.5.3. Interview with representatives from Australian fashion industry.................................................................10
1.5.4. Survey..................................................................................................................10
1.5.5. Business seminars ...............................................................................................11
1.5.6. Fieldwork and review of markets .......................................................................11
1.6. Research parameters...............................................................................................11
1.6.1. Limitations.......................................................................................................11
1.6.2. Definitions.........................................................................................................12

PART A: Literature review and case study ........................................................................14

2. Literature review...........................................................................................................14
2.1. Introduction .............................................................................................................14
2.2. Tween concept ......................................................................................................15
2.3. Tween consumption...............................................................................................16
2.4. Tween girls’ culture – difference between countries regarding fashion .........................19
2.5. Key influences driving tween girls fashion consumption ......................................21
2.5.1. Media.................................................................................................................21
2.5.2. Peer pressure ....................................................................................................23
2.6. Conclusion.............................................................................................................24

3. Fashion business in the tween girls demographic: international experience ...............25
3.1. Introduction .............................................................................................................25
3.2. An exploration of the key influences in the Japanese tween girls fashion market .....................25
3.2.1. Background......................................................................................................25
7. Appendices ................................................................. 79
8. Bibliography ............................................................. 90
In Summary

In the last decade, children who are in the age range between childhood and adolescence, the so called ‘tweens’, have captured the attention and a great deal of interest of marketers and many commercial stakeholders in different fields of business due to their significant spending power and specific culture. Tweens are now much more strongly targeted by marketers and businesses than were the previous generation; girls in particularly are targeted more than boys.

Within a fashion context, tween girls are expanding their influence and their consumer power in the market. Following the global acknowledgement of tweens, in Australia, and in Melbourne in particular, tween fashion retailers have been emerging and evolving recently in response to the market’s interest and demand for tween fashion. The tween girls’ fashion consumption has a viability and is seen a major emergent marketing phenomenon one that is predicted to expand.

There is currently a debate in Australia whether tween girls dress inappropriately as adults. This may be a result of the absence of a particular tween girls fashion sector in fashion industry in Melbourne. Further development will be significant in providing age-appropriate clothing range for the market. In order to achieve this, it is necessary to investigate the market segment.

A case study of a Japanese company is used to gain further understanding of current and future developments within the market. The case study will provide some background information to the situation being presented and assist in the analysis of possible suggestions and recommendations.

The tween girls fashion industry incorporates many different factors. There is a specific focus on the opportunities for expansion and adaptation in the market segment. This research investigates the tween girls’ fashion segment in Australia to identify and understand its relationship with respect to fashion marketing and consumption. It also identifies the gaps or opportunities in the market and proposes business opportunities to address these gaps.

This research demonstrates the possibility for the market development of tween girls in Melbourne.
1. Introduction

1.1. Statement of topic

The purpose of this research is to examine and analyse the factors relating to the particular demographic of tween girls in the Australian fashion industry, with specific reference to Melbourne. Tweens are defined the same as pre-teens, which is between young children and teenagers. This research mainly focuses on girls aged between 8-14 years old. It aims to investigate the opportunities for expansion and adaptation in order to obtain market acceptance within the tween girls fashion sector in Australia. It attempts to understand the Australian fashion industry’s perceptions of the tween girls’ phenomenon and its views from a business and retail perspective, as well identify the gaps and potential opportunities in this market group in Melbourne.

1.2. Significance of the research

The tween sector has attracted a great deal of recent interest in various industries due to its significant spending power and its specific culture. There are various studies and research on the world-wide scale to profile characteristics of the tween consumer (Grant & Stephen 2005; Lindstrom 2004; Siegel, Coffey & Livingston 2004). The fashion industry has proven to be quite aware of this sector and has responded by developing the market for it as something distinct from both the teenage and the younger children’s wear market. Marketers see it as an opportunity to produce and circulate products for this distinctive culture. In the tween years, they start to have their own personal interests, and fashion is one of the categories that girls focus upon (Siegel, Coffey & Livingston 2004; Grant & Stephen 2005; Tufte 2003). In addition, the formation of this market is quite alike to the teenage market. The teenagers became to the first pop group to identify themselves with new subculture in middle 20th century(Solomon & Robolt 2004). The tween sector has very similar characteristics to the teen sector. The tween market is constantly keeping up with the teen market and it is becoming the significant demographic group which will take its place to be positioned in market
place similar to teenage sector. The concept of teen values interests marketers in many industry such as the internet and cell phones around the world (Parker, Hermans & Schaefer 2004).

Despite the acknowledgement of this tween demographic, the Australian market has conducted little research and there is limited literature reporting on the subject. Although, in Australia, there are increasingly more small-scale articles appearing in the newspapers and on the internet as well as on television programs. These articles are generally focused on tweens’ self-image, sexualisation and anxieties. Following the global acknowledgement of tweens, there are clear indications in the media that the tween fashion market is continuing to develop and is alive and well in Australia as well as in other countries. For example, according to Insight (SBS, 2nd April 2007), there are more than 2 million tweens in Australia and they have growing spending power. The Australian tweens are worth an estimated $4 billion to the economy. This research is valuable because it highlights the potential for market expansion opportunities but it also suggests the possibility of further development of the tween girls fashion market in Melbourne specifically.

Janice Breen Burns, a fashion journalist at The Age reported as early as 2005 that tween fashion retailers were emerging and evolving in Australia (Burns 2005). Since then there have been many media articles about the new powerful construct of marketing and consumerism for tweens. There has even been tween-oriented fashion shows called ‘MINI ME’ and ‘SHOW-OFF’ included in The L’Oreal Melbourne Fashion Festival in 2008 in Melbourne (L’Oreal Melbourne Fashion Festival 2008). This provides a clear indication of the market’s interest in and demand for tween fashion. In addition, The Global Market Information Database (GMID) in 2006 described Australian tweens in the same terms as tweens from other developed countries. It highlights the fact that ‘Tweenagers … now have about twice as much spending power as in 1995’ (GMID 2006). Given the global movement of this new consumer group and the Melbourne consumer and market activity, the tween girls’ fashion consumption is predicted to emerge as one of the major marketing phenomena in the fashion industry in Melbourne in the near future.

The new movement in the tween fashion market will be helped by the development of the Victorian Government’s retail strategies – ‘Melbourne city will be renowned globally as Australia’s leading retail city with an unrivalled retail
landscape acclaimed for its diversity and compelling experience’ (Melbourne Retail Strategy 2006 : 2012, p.7). These strategies encourage the retail sector in Melbourne and also offer to cultivate new and unique retail experiences. Linked to this retail movement in Melbourne, the tween consumer market also has a potential to expand.

This research aims to offer ideas for the expansion of the tween girls fashion industry, as well as necessary strategies for adaptation of new ranges and brands for the market in Melbourne. It appears that there is no solid border between teens and tweens in the fashion industry in Australia. Further market development will be significant because there is currently a debate whether tween girls are dressing inappropriately as adults; therefore a developed new range for the tween girls market could provide age-appropriate clothing. This research investigates the tween girl’s fashion market. It is not a critique of marketing activities for attracting children as this is beyond the scope of this thesis. This thesis seeks to identify gaps in the tween girls’ fashion market in Melbourne and explores potential opportunities to address these gaps.

1.3. Background to the research

The researcher has lived in Japan for 28 years and was previously an employee of the Narumiya International Co. Ltd. between 2000 and 2003. This experience is used in this research. From her experience, the researcher has seen the company grow due to the popularity of tween girls fashion market in Japan. The researcher has become aware of the differences and similarities in tween girls fashion market between Australia and Japan since the researcher has moved to Melbourne. Having been employed by Narumiya, the researcher’s knowledge and observation of the fashion industry was founded on and has evolved to include the study of fashion marketing and the fashion business in Japan and Australia.

Fashion is a part of broader Japanese culture. On an international level, contemporary Japanese culture has taken root in various fields including the arts, film, anime (a medium of animated cartoons originating in Japan), manga comics
(manga is the Japanese word for comics and print cartoons), food, design and fashion. The interest in Japanese popular culture is attracting attention globally, especially from Asian youth (Lee, 2005). Appreciation of Japanese culture is not only emerging in Asian countries, but it is also spreading worldwide, particularly among the younger generation in Europe and North America through the media (Simeon 2006). For example, American pop star Gwen Stefani often uses a Tokyo street-inspired look and uses the Japanese pop culture influence in her performances (Wald 1998; The age 2006).

Within this international context, there have been several Japanese cultural influences that have been adopted by Australian life and culture in the last decade, and this is increasing. Japanese culture, especially popular culture, is represented in different ways in Australia. Australia has been significantly raising the profile and awareness of both popular and traditional Japanese culture. For instance, Japanese cuisine such as sushi has become popular in Australia over the last decade, which has given Japanese culture a familiar profile in Australia’s lifestyle and culture.

While Japanese fashion brands are yet to become as popular internationally as those from The United States (U.S) and Europe, they appear to be making inroads into the international fashion market and they have been attracting worldwide attention in recent years. Japanese design first made a real impression on the fashion world back in the 1970s and 1980s. Many Japanese designers established themselves as influential designers in international fashion (Kawamura 2004; Mitchell 2005). Well-known Japanese designers, such as Issey Miyake, Yohji Yamamoto, Kenzo and Rei Kawakubo of Comme des Garcons created a movement and made an impact on contemporary fashion globally (Kawamura 2004; Mitchell 2005). Needless to say, these designers still play a big part in setting the trends for world fashion today. International interest in Japanese fashion has expanded to include Japanese street fashion, which is now highly influential on a global scale (Breward & Gilbert 2006).

During this research, the progression of Japanese fashion culture in Melbourne has became clearer. Melbourne is well known as a fashion-oriented city compared to other cities in Australia (Breward & Gilbert 2006). Weller (2006) describes Melbourne as “… a city with a vibrant fashion retailing sector…but it is about as far away from the recognised world centres of fashion as it is possible to be”
In addition, Melbourne is also well known as a multi-cultural city and consequently more open to adapt to different cultures and fashion styles. While those popular cultures referred to earlier are penetrating and assimilating with the Australian culture, cross-cultural influences have come into fashion in recent years as part of popular culture. Japanese fashion exports are available in Melbourne, although it is still a niche market. It is beginning to expand through the retailers who sell Japanese product such as ‘Genki’ and ‘SOMEDAY’. Stores that are succeeding in this niche market are introducing Japanese fashion products into the Melbourne market. It is indicated by owners of both stores that Japanese fashion culture is penetrating the Melbourne fashion market and has been accepted, although so far only by specific groups of consumers.

The mainstream media has recently reported on the rising interest in Asian fashion with due to Melbourne’s CBD student residents. One particular newspaper article comments on the influence of Melbourne’s Asian students on the city’s fashion, not only in the city but spreading to the suburbs as well. It suggests the Asian influence is moving into local boutiques which also deal with other international products (Wells 2007).

Walk through the city on any given day and it’s hard to ignore the Asian fashion aesthetic…..It’s not exactly the crazy parades of Tokyo’s Harajyuku district, but the colour, the bold prints and motifs, the designer handbags, the kitsch bling – it’s hard to miss. So too, the dozens of Asian fashion boutiques (Wells 2007, p.7).

‘OzAsian fashion’ (Wells 2007) is one of the new styles surfacing in Melbourne and appeals through its uniqueness in the local market. According to this point of view, there is a potential for Asian, particularly Japanese style, to compete alongside the local style. Although this article focused on the late teen to young adult fashion scene, that scene is part of the cross cultural fashion discourse in Melbourne and it could influence the younger generation of consumers in the future. This ‘OzAsian fashion’ may have a potential to trickle down to tweens because in fashion trends, teenager’s trends normally tend to trickle down to younger girls, who imitate older teenagers.
There are additional factors that show the attention, interest and influence that Japanese and Asian fashion attracts in Melbourne. A major reason could be the high Asian population, especially of Asian students. According to Takao Tanaka, who runs a magazine store called ‘Kanga Kanga’ in Melbourne, these Asian students are highly influenced by Japanese fashion and are quite interested in it. According to a specialist Japanese fashion newspaper, SENKEN, Japanese fashion has a high status among other Asian nations. It indicates that if it succeeds in Japan, the probability of success in other Asian markets rises substantially (Senken 2007). As a matter of fact, other Asian markets, such as the Taiwanese market, receive strong influence from Japanese pop culture including from fashion. As one example, Japanese fashion magazines such as ViVi, Mina and Non-no are published in other Asian countries such as Taiwan and China. The Chinese versions of Japanese fashion magazines sell well and half of the magazine contents are translated using the same pictures as the Japanese version. The other half is edited locally, however even the local pages are influenced by Japanese fashion. According to Mr Tanaka, many Asian customers are still buying the Japanese version of the fashion magazines. This shows that there is a potential for Japanese fashion’s influence and adaptation in Melbourne.

The researcher’s background of experience acknowledges that Japanese culture, particularly in fashion, attracts worldwide interest and the situation applies to the Australian market as well. Despite the rise of cross-cultural influences, in part due to the globalisation of fashion discourse, Australian consumers do not necessarily have increased access to overseas brands, although there are signs that Japanese fashion has a potential to compete within local market. This research uses the Japanese model as a reference to suggest there are potential business opportunities within the tween girls fashion segment.

1.4. Research Objectives

The focus of this research is to investigate the tween girls’ fashion segment in Australia and identify and explain the potential for development in the Australian tween girls’ fashion market with a specific focus on Melbourne. The main objective of this research is to understand the characteristics of the Australian tween girls
demographic with respect to fashion marketing and consumption. In addition, this research investigates and analyses the differences and similarities between Japanese and Australian concepts of tween fashion through a case study, while acknowledging cultural differences and the different market situations.

The primary objectives are as follows:

- To understand the characteristic traits of the Australian tween demographic, and girls in particular, with respect to fashion marketing and consumption.

- To identify the gaps or opportunities in this market groups in Melbourne, Australia.

- To propose business opportunities to address these gaps in the Melbourne tween fashion sector.

In order to carry out this research investigation, it is essential to consider the following secondary objectives.

- The relationship between tween girls and tween girls' fashion brands in Australia.

- To analyse the industry/business perception and social perception toward adapting overseas brands represented in the Australian market.

A key reason for addressing this is to achieve an understanding of this sector from an industry view, as well as its market and social specifics. It is essential to consider cultural significance issues in relation to potential market opportunities.

This research does not extend to reflect much broader critical issue about marketing to children. Instead, this research addresses the question about whether business targeting of tweens, particularly in the fashion industry, has a potential for market expansion and adaptation.
1.5. Research Methodology

1.5.1. Introduction

This thesis is based on both primary and secondary research. Primary research involved a survey and interviews with experts in the fashion industry, from both the tween segment and companies that specifically market Japanese apparel-related products. The interviews with industry experts delivered crucial qualitative information and industry perceptions by tapping into their expertise. The results of the survey essentially provided quantitative data for analysis of the current situation. These methods assisted in developing basic guidelines for the structure of the investigation in this research. This particular study is informed by survey results and interviews with industry professionals. There are several key factors to be considered that are relevant to tween girls fashion consumption and development of relationships with fashion brands. Secondary research involved the gathering of qualitative data through the review of literature, the analysis of the current Australian tween fashion industry and site-visits (observational research).

This research is designed as basic interpretive qualitative research. The outcomes were derived from interviews and the survey and they have the potential to improve the understanding of this social phenomenon. Both primary and secondary sources of data have been used in this qualitative analysis. The interviews and survey were crucial as this research is designed as up-to-date research; therefore expertise from industry professionals’ interviews is necessary in order to gain rich data. Specifically with regard to the research focus on Melbourne. This is not always the case with the literature.

1.5.2. Literature review

A review and critique of the available literature was undertaken and formed the basis for this research. There is no text that relates directly to this research question, however there are many publications that relate to specific components of the related topics in this research such as tween’s consuming, tween’s relationship with brands and marketing to children and tweens in various industry, which focus on not only clothing. There is a broad selection of
published magazine and newspaper articles, and journals, as well as fashion, lifestyle and culture orientated articles which provide detailed information regarding tween fashion trends and an analysis of customer behaviour and social influences. To examine and understand the formation of tweens as a marketing and cultural demographic, this research uses a wide variety of popular culture sources, such as girls’ magazines and internet sources. Both Australian and Japanese reference material have also been used.

1.5.3. Interview with representatives from Australian fashion industry

As this research is an industry based study, a significant component of the research has come through interviews with professionals in the Australian fashion industry. The purpose of the interview is to provide qualitative data on the research topic from expert experience or knowledge of the specific area. Face to face interviews were carried out with designers, buyers, product managers and retailers in the fashion industry. The interviews were used to collect information on the current issues in the children’s wear industry, particularly in tween girls’ fashion, and identify opportunities and barriers for the development of retailing opportunities. The interviews followed a semi-structured questionnaire format.

1.5.4. Survey

For the purpose of consumer research, a survey was developed to examine tween fashion consumption, to observe needs and perceptions regarding tween fashion and how tweens interact with specific brands and stores. For this survey, questions are constructed to obtain a qualitative response. Data collection methods sought to capture the lived experience of the tweens’ fashion consumption. The survey was designed for and piloted with tweens’ parents to gain information and understanding of the tween consumers’ requirements and preferences for their clothing and also to understand their brand awareness and perceptions. In addition, the survey was designed to obtain the views of tweens’ parents in addition to the views of their children.
1.5.5. Business seminars

Attendances at seminars with industry professionals relating to this research such as L’Oreal Melbourne Fashion Festival Business Seminar and a business seminar by Austrade provide a context and an understanding of the Australian fashion sector. In addition, the JBC networking seminar provides insight into business relations between Japan and Australia. It is useful to acknowledge the other industry areas which successfully conduct business between Japan and Australia because they might provide a key to successful business relationships. In addition, fashion seminars and workshops where industry groups present lectures and papers have provided relevant current research for this thesis.

1.5.6. Fieldwork and review of markets

Site-visits and fieldwork are useful tools for observational research as the researcher can gain additional insight a deeper and better understanding of their object (Finlay 2008). The researcher is able to gain a deeper understanding of the current conditions of the tweens in their natural context. In addition, the researcher has gained information about some of the issues and difficulties faced by the tweens. The site-visit simply entails analysing products and perceiving current trends and contexts in the Australian tween fashion industry within different retail stores in Melbourne. Site-visits are conducted within Greater Melbourne to various retailer types. As this research focuses on Melbourne, it may not hold outside of Melbourne and some differences among the various types of retailer would be expected. It does not involve any form of interview with the subjects. The intention is to survey and gain the perception of the market place by observing all elements, including retail, consumer behaviours and demographics.

1.6. Research parameters

1.6.1. Limitations

Although various methods have been used to analyse and compile the data for this research, it is acknowledged that the data is not comprehensive. The
original survey sampling approach plan was through schools to tweens’ parents. However, in the absence of permission from the schools which were approached, the sample size is relatively small and consequently the information provided through the survey could be more in-depth.

There are many companies, brands and stores dealing with children’s fashion, including the tween ranges. It was not possible to include all of them in this research. Moreover, the research was not able to include all companies which were approached. A representative group consists of three different retail segments was identified as important to this research. Only companies agreeing to participate in this research are included.

Government statistical data such as the Australian Bureau of Statistics (ABS) has been used where suitable. However, there is a limitation, such as the issue that the tween wear segment is usually included as part of the children’s clothing industry segment. As a result of this, it is hard to have accurate data of the tween segment, though it has been considered and used in a general way.

1.6.2. Definitions
For the purpose of this research, certain terms need to be defined to ensure that the parameters of this research are clearly understood.

- Tween fashion market
- Fashion Industry
- Children’s wear

**Tween Fashion market**
The fashion market is basically a place at which trade in fashion products is conducted. The fashion market is any place where sellers of fashion products or services meet with the buyer, particularly the customer in this research. It is defined as not only a physical place but also as a group of consumers.
The tween fashion market is an emerging market within the Australian fashion industry. It has just started to establish itself through differentiation from the children’s clothing industry. However, it is included in the children’s clothing sector in regards to sales statistics and as a business category. The market is not recognised strongly as the tween fashion market, although this new market is expanding into the teen and adult fashion market sector. It is difficult to separate the tween fashion market and the teen fashion market at the moment in Melbourne. The tween fashion market is defined for the purpose of this research as the clothing sector that includes children between 8 and 14 years of age.

**Fashion Industry**

There are many definitions of the fashion industry. Webster (1997) defines the fashion industry in her research as people or companies, including designers, fabricators, agents, retailers, buyers, administrators, media and manufacturers of clothing, footwear and accessories. This research focuses on the clothing sector. This term is used to refer not only to the manufacturers of or companies for fashion products but also to all the other related sectors, from manufacturer to the end consumer, in this research.

**Children’s wear**

Children’s wear usually contains three main sectors. They are categorised as girls and boys, kids (approximately up to six years old) and infants (approximately up to two years (24 months) of age). In this research, the tween segment is defined as the girls and boys section, with a focus on girls. In this research, children’s wear is defined as including all these three sectors.
PART A: Literature review and case study

2. Literature review

2.1. Introduction

The following literature review can provide insight into the tween girls fashion market in this research and assist in constructing the knowledge needed for further investigation and analysis. To understand the tweens as a group of consumers, there is a need to understand the relationship between tweens and fashion consumption.

There is very little existing research on tweens as a fashion consumer group in Australia. In fact, it is not only tweens that suffer from a lack of acknowledgement. Karen Webster is a director of L'Oreal Melbourne Fashion Festival. Webster notes in her Master research that ‘There is a lack of in depth Australian literature analysing fashion and the local culture…’ in general (Webster 1997, p.22). Since Webster's research was conducted, 10 years ago, little has been done, thus there are only a few academic research reports and books relating to this research directly, which focuses on tween girls, particularly their fashion consumption. Furthermore, the expansion of the market and the opportunities of adaptation of another nation’s fashion culture into the local market has not been explored. However, there are some significant published works that relate specifically to the expansion of the global tween market. As well, as there is fair bit of press in popular media about tween girls in Australia, which are mentioned in the following sub-chapters. Because of the lack of studies which specifically focus on the Australian tween fashion market sector, this research relies primarily on interviews, survey results, current journal and magazine articles rather than past publications, as well as the researcher’s observations.

There are certainly texts that focus on the tween segment written in the United States of America (USA), and the United Kingdom (UK), Japan and Europe. In analysing this literature, it is important to maintain a global perspective, as parallels can be drawn with the Australian fashion industry, particularly as the fashion industry now works on a global level. An analysis of the international
literature provides a representative model as well as the foundation for this research, from which the Australian situation can be generalised.

The review finds there is clearly a definable social group that can be labelled as tween. The profile of tween consumer behaviour covers topics such as tween consumption, buying habits, and the relationship between tween consumers and brands. Lately the tween market has split in terms of gender. When describing the tween as a group in this chapter, the researcher is particularly focusing on tween girls. The research reveals that businesses have realised there is a need to understand the tween as an independent consumer (Lindstrom 2003; McDougall & Chantrey 2004; Siegel, Coffey & Livingston 2004).

2.2. Tween concept

The definition of tween varies according to different sources. Regardless of the exact age definition, most agree that their age range is roughly the same as pre-teens, that is, between childhood and adolescence (Cook & Kaiser 2004; Siegel, Coffey & Livingston 2004). It is the age when a person rejects more childlike images and associations and aspires to be more like a teen (Quart 2003). There are various views as to the specific age range for tweens. Their age is defined from as wide as 8-14 years old (Lindstrom 2004), but more commonly they are defined as 8-12 years old (McNeal 2001; Siegel, Coffey & Livingston 2004), while the Global Market Information Database (GMID) define the age range from 10 -14 years old (2006). But perhaps it is all about self-identification. According to Siegel Coffey & Livingston (2004, p.225), ‘Some even define tweens not as an age group but as a “state of mind”’. In this research, the tween age range is defined as between 8 and 14 years old, with the focus on tween girls. The definition is determined to be as inclusive as possible, to incorporate the industry clothing standards and the likely parameters for the tween state of mind.

The term tween is a comparatively new marketing concept (Lindstrom 2004; Siegel, Coffey & Livingston 2004). Thus, there are opportunities to expand and offer challenges in this market. It is acknowledged that more and more businesses and marketers are beginning to realise the tween market. Businesses may
consider that the next step is to develop brand loyalty with them in order to take the initiative. The emergence of the tween market has been identified as a recent marketing phenomenon on a global scale, and has attracted interest from many industries (Grant & Stephen 2005). The tween is seen as a prime target for television shows, toys, magazines, videos, advertising, clothing lines and retail services such as hair salons.

2.3. Tween consumption

Some studies have been undertaken on a world-wide scale to profile characteristics of the tween consumer (Grant & Stephen 2005; Lindstrom 2004; Siegel, Coffey & Livingston 2004). The tween is undoubtedly becoming a powerful purchasing consumer segment in today’s market. Lindstrom (2003) describes tweens as ‘the “richest generation” in history and the spending of this age group has roughly doubled every ten years over the last three decades’ (Lindstrom 2003, p.26). Thus, it is naturally that tweens are being targeted strongly by businesses and marketers. Additional research confirms that today’s tweens have a high disposable income and have become significant decision-makers in their own right (Siegel, Coffey & Livingston 2004). They are not only considered to be as an independent consumer group; they also have influence over family purchases, both directly and indirectly (Lindstrom 2004; Siegel, Coffey & Livingston 2004). However, tweens are not entirely in control. Cook states that ‘The child consumer today appears as a contested figure on the landscape of consumption. It stands both for corporate exploitation and individual autonomy’ (Cook 2007, p.37).

Nowadays many components of tweens’ culture interconnect with consumption. Tweens desire independence and the experience of consumption, and identify themselves as part of a modernised culture. For the last decade, tweens have spent a lot more money and grown in their independence for consumption. According to Lindstrom, an expert on branding and the author of BRAND child (2003), direct expenditure on tweens is estimated at $15 billion a year in US, and strongly influences more than $30 billion of family purchases that are made by parents (Lindstrom 2003), while Sigel, Coffey & Livingston (2004) state that their spending is $20 billion and growing. Whatever the figure, tweens spending power
is rising and they are considered more affluent and influential than the tweens of previous generations (Lindstrom 2004; McDougall & Chantrey 2004; Sigel et al. 2004). Today's tweens represent an important and lucrative demographic and make up a big part of the consumer market.

Why have tweens got consumer power when they do not earn? There are several reasons for this, including that parents' behaviour is changing. They are happy to give their children more money and they involve tweens in purchasing decisions (Siegel, Coffey & Livingston 2004). This shift in family dynamics is caused by the fact that parents do not have as much time for shopping, and there are more dual income families with higher disposable income who can give children more money to spend on themselves. By doing this, they are involving their children in family purchase decision-making (McLaughlin 1991, cited in Simpson, Douglas & Schimmel 1998).

The concept of tween values interests marketers globally in various industries because it offers possibilities and opportunities to expand market size and range, to treat them as individual consumers (Guthrie 2005). Solomon and Rabolt designated them as 'a generation with economic power unlike anyone before them' (2004, p.182). The tween's remarkable spending power has considerable influence over their peers and in addition older children such as teenagers and even adult consumers, who tweens aspire to be like them (Grant & Stephen 2005; Quart 2003).

Tweens present marketing challenges because they are part of the most marketing savvy, and ever more brand-aware as well as consumer-oriented generation, while they are still in a process of emotional, physical and intellectual development. Therefore, it may be difficult to persuade them to buy a product.

With the emerging recognition of the tween market, the marketer needs to understand the role of the tween as an independent consumer, and develop the relationship between brands and tweens (Ross & Harradine 2004). The recently published book, BRAND child (Lindstrom, 2003) considers tween attitudes and their relationship to brands. The data in this book has been developed with nine to fourteen year olds across seven countries representing a cross section of economies, as well as western and non-western cultures. Lindstrom (2003)
determines that businesses have to find out the tween’s need and what influences them, which builds a relationship between tweens and brands, wherever a business is located. Moreover, De Chernatory and McDonald (1998) state that the benefit of successful branding is to build relationships through consumer loyalty. However, Hollis (2003) finds that tweens are less likely to have brand loyalty compared to adults, although tweens are strong brand advocates in relation to famous grown-up brands which they have been familiar with since young. These big brand names include Coca Cola and McDonalds. On the other hand, in fact, children as young as age three recognize brand logos (Fischer 1991) and brand loyalty starts to develop at age two (McNeal 1992). As stated by Schor (2004), tweens have their brand preferences and they are able to perceive which brands are ‘cool’ through advertising. In this context, it is unclear whether tweens have the same type of relationship with brands as adults do, particularly with fashion brands. Research indicates that tweens were more concerned with brand names (Grant & Stephen 2005; Simpson, Douglas & Schimmel 1998).

Klein (2000), author of No Logo, states that the youth market is capable and willing to pay to be ‘cool’. Several authors acknowledge what are the key factors to operate in the tween market (Acuff & Reiher 1997; Guber & Berry 1993; Lindstrom & Seybold 2003). In order to operate these market strategies effectively, it must integrate with the tween world and link to what is ‘cool’. Tweens views and attitudes are easily changed and are sensitive. Therefore, any brands targeting tweens have to keep up with them. This is according to The Media Awareness Network which is a Canadian non-profit organization that has been pioneering the development of media literacy programs:

Some companies hire ‘cool hunters’ or ‘cultural spies’ to infiltrate the world of teens and bring back the latest trends. Trying to stay ahead of the next trend can be a tricky business however, as cultural critic Douglas Rushkoff explains. ‘The minute a cool trend is discovered, repackaged, and sold to kids at the mall—it’s no longer cool. So the kids turn to something else, and the whole process starts all over again’ (Media Awareness Network 2007, pg.7)

In addition, it is essential for business to address the tween consumer group attributes and understand shifting patterns of brand or product loyalty among tweens. To effectively reach the youth market, marketers need to have an integrated approach. In order to attract and keep this consumer segment, retailers
or marketing sections of companies need to know what is ‘cool’ to them and what drives their consumption. In this ever more competitive environment, with globalisation of the media and cultural industries, the tween has become an increasingly important focus of commercial interest. Indeed, it has been argued that it is critical to market to children (Linn 2004; Quart 2003).

2.4. Tween girls’ culture – difference between countries regarding fashion

In the tween segment, girls are more the focus of analysis, both in academic and commercial research. The tween girls segment attracts more attention than the boys segment, as we see in the variety of books that focus on girlhood, and also academic studies and professional research conducted over the last decade (Mitchell 2005; Cook 2004; Driscoll 2002; Grant & Stephen 2005; McRobbie 2000). Mitchell (2005) states that the tween culture study of girlhood as something new in the consumer market has only recently emerged.

Girls’ power has only just been discovered in the consumer market and there is so far no young male equivalent. It is usually confined to a ‘girl’s thing’. Marketers see it as an opportunity to produce and circulate products for this distinctive culture. In the tween years, they start to have their own personal interests, and fashion is one of the categories girls focus upon (Siegel, Coffey & Livingston 2004; Grant & Stephen 2005; Tufte 2003). They become interested in their choices of clothing early, and today’s tweens are more sophisticated than ever and they expand their knowledge through various types of media. Research has found that tween girls are interested in spending money on clothing and they are interested in buying cheaper versions of designer labels (Grant & Stephen 2005). This theory not only reveals the tween demographical characteristics, it also emphasise the female focus of the phenomenon.

Anita Harris is an associate professor at the University of Queensland and her expertise includes youth identities and culture, particularly of young women. Harris (2005) has written extensively about the tween girl. Her work is of particular interest because it provides relevant information about Australian tweens.
particularly focusing on girls. It provides the researcher with essential information as it is rare to find research literature with a focus on Australian tweens. Usually the research literature focuses on the United State of America (USA) and the United Kingdom, (UK). Harris (2005) comments that tween culture is itself a specific culture, one that comes to be universalised. She also determines that the products and images have no significant differences between countries, especially in the tween girls’ culture. The girls’ fantasy is one of a mythical belonging to a like-minded girls’ world, one common to Australia and other countries. In addition, such a comment on Australian tween girls’ culture presents the perspective of white Anglo culture, although with a significant number of migrants, it has been represented as multicultural. These ideas come mostly from images in magazines and other media such as television and the internet.

However some cultural differences are expected between where people live and what environments they live in, including their preferences regarding clothing (Andersen et. al 2007; Parker, Harmans & Schaefer 2004). In general, Culture plays a big role when it comes to fashion, and fashion ideas and style that have been adapted are culturally influenced (Weller 2006). Although the globalisation of the media and fashion trends become more common in recent years, the relationship between fashion and local style remains close (Weller 2006). However, as against adult fashion culture, the tween segment and tween culture is a truly homogeneous and global social and consumer group. Australian fashion has a distinctive style, which has evolved from cultural influences, climate and lifestyle (Craik 2006). Furthermore, the Australian geography is the reverse of the northern hemisphere seasons (Weller 2006). Craik (2006) has also pointed out that Australia is a multi-cultural society with other cultural forms of fashion moulding the national culture. She is not sure how these will change and be represented in the fashion media and popular culture.

Weller (2006) looked at the Australian fashion style character and overseas brands in Australia, and commented that overseas brands are able to successfully market their styles in Australia, often without change. She suggests that Australia has only a weak locally distinctive dress culture. However, she also notes that ‘Australians appear to warm to particular brands suggests there is some local flavour to fashion preferences’ (Weller 2006, p.49). This may indicate that overseas brands have a potential for success in the Australian market, and perhaps through further expansion of the market.
The adult and young adult fashion market has already started referring to international and overseas brands which are penetrating the fashion market in Melbourne. How is it that the international or overseas brands are able to penetrate or become adapted to the youth fashion market? Many researchers state that today’s tweens have grown up with the media and it is easy for them to access any information (Lindstrom 2003; Quart 2003; Siegel, Coffey & Livingston 2004). In the fashion context of the tween market, their media sources are certainly worldwide, such as the internet and the celebrity fashion styles available in magazines. As the literature states that the tween girl culture is not affected as much by local cultural influences, and overseas brand have a potential for success in the Australian market, the adaptation of overseas business has the potential to attract interest within the Australian market.

2.5. Key influences driving tween girls fashion consumption

2.5.1. Media

Today’s tween generation has grown up in a high-technology environment and they have easy access to any information through the media. Tweens are seemingly enthusiastic for media of all kinds. Research demonstrates that tweens are exposed to many types of media and these certainly have influenced them (Andersen et al. 2007; Tufte & Kristensen 2006). Tween culture is constructed by the media. There are significant media influences in the tween fashion context. Grant and Stephen (2005) reveal that magazines are the most significant tool for influencing the fashion buying behavior of tween girls. The magazines read by tweens provide everything a girl wants and needs, such as celebrity gossip, fashion, music, movies and games. Tween girls are looking for ways to express themselves and aspire to be cool, glamorous and up to date with the latest trends. These magazines present pop culture to tween girls.

In the case of Australia, Total Girl is the leading market magazine aimed at tween girls as young as six in Australia. On the Total Girl’s website, it is shown that ‘Total Girl understands tween girls and creates a girl’s only zone - a kind of secret club - that boys and parents don’t understand’ (2007). These
magazines are a big part of this culture and have a strong impact on tween girls fashion consumption (Grant & Stephen 2005). These magazines give them brand awareness and build an affinity within them. The publishing company of Total Girl, Pacific Magazines, conducted a circulation survey (2006) that indicated that tween culture itself is expanding. Tweens’ fashion consciousness is influenced by the magazines. According to Pacific Magazines, Total Girl is;

…with an overwhelming 59 per cent share of circulation in the category and out-selling the nearest competitor by more than 2:1. Total Girl now also leads the tween market overall – a remarkable performance with the magazine securing a 25 per cent share of circulations in the overall category. (Pacific Magazine 2006, p.3).

Furthermore, according to a Pacific Magazines readership survey (based on 2004 March readership), around one in three girls aged 8 -11 years old read Total Girl each month (Seven corporate 2004, p.1). In addition, the success of Total Girl shows that the tween market is expanding in Australia. Circulation has grown from 55,000 to 80,000 in the last four years since they started publishing (Lawson 2006, p.4). Total Girl is not the only indication. Another magazine for tween girls, Disney Girl, also grew their readership by 18.57 per cent from July - December 2003 to January - June 2004 (Bainbridge 2004).

The internet is becoming a necessity in our lives and it is very familiar to the tween generation as well. They were born into a highly consumerist and technological world. They are receiving more marketing and advertising than ever and much of it comes through the internet. Today’s tweens represent the first generation to practise adolescent independence on the internet: tweens do not need parents or teachers to help them gather information. This instant access to the world through the web has bolstered a respect for knowledge. Recent research from the Australian Broadcasting Authority revealed that 37 per cent of 11 and 12 years olds have their own mobile phones and nearly half of them send text messages everyday. In addition, when they are not texting their friends, many 12 and 13 years old are using the internet daily (Galvin 2005). It appears that mobile phone and email are a major source of communication tools for maintaining friendships within the tween group as they are in adult society.
2.5.2. Peer pressure

By definition, a peer is a person who is the same age or who has the same social status or interests as another. The term ‘peer pressure’ in the negative sense, pressure exerted by a peer group, means encouraging a person to change their attitude, behavior, or their morals. For example, they may be pressured to change their fashion sense, taste in music and television, or outlook on life. It does not say anything about whether the influence is positive or negative necessarily. It is difficult to decide whether peer pressure is a negative or positive influence with regard to their fashion preference. Nevertheless, this sub-chapter focuses on how peer pressure influences tween girls’s fashion preferences.

Many studies demonstrate that peer pressure is a key factor in influencing tweens (Guber & Berry 1993; Lindstrom 2004; Mc Dougall & Chantrey 2004; Siegel, Coffey & Livingston 2004; Simpson, Douglas & Schimmel 1998). In addition, research reveals that peer pressure concerning fashion preference is strong among young people, tweens included. They want to be like other people of the same group or age. According to the Millward Brown research (2003), tweens need to feel part of a group. It is a fact that peer pressure drives what brands they buy and brands play a role in helping them belong to a group. Mainly their fads tend to sweep through school and their brand preferences tend to be popular among the particular group that tween girls belong to. Some studies have found that wearing certain types of clothing, especially brand-name apparel, is a way of ‘fitting in’ for tweens (Forney & Forney 1995; Miller 1994; Simpson, Douglas & Schimmel 1998). In the tween girls’ culture, the peer pressure might be stronger compared with the older youth or boys segment. Grant and Stephen (2005) have found that there are some communicating factors which influence tween girls’ purchasing of fashion clothing and they confirm that tween girls make a decision regarding the clothing depending on which group of friends they belong to. In addition, they determine that a sibling’s opinions were important and valued. Moreover, Simpson, Douglas and Schimmel (1998) show that some studies have found that wearing a certain type of clothing, especially well-known brand name fashion apparel products, is the way of ‘fitting in’ for tweens as well as teenagers.
Thus, tweens form friendship ‘tribes’ largely dictated by fashion. This is especially seen more in tween girls than in the boys sector. For marketers and businesses, understanding these ‘tribes’ is essential for effective targeted marketing. Peer pressure and influence have important marketing consequences in fashion preferences and consumption and lead to brand loyalty among tweens.

2.6. Conclusion

This chapter has explored how a variety of industries are developing products and service for increasingly powerful tween consumer segment. The fashion industry is no exception. In addition, some researchers are reporting on topics relating to tween girls’ fashion consumption (Cook & Kaiser 2004; Grant & Stephen 2005; Holdolf & McClung 2006), although those studies have not examined the Australian tween girls’ fashion market. Most of the literature investigates the situation in developed countries such as the U.S., UK and Japan; exceptionally there are some reports which focus on the young Chinese consumers. There are very few current studies and research of tweens in the Australian context, particularly regarding tween girls’ fashion consumption and marketing, as well as within cross-cultural discourse.

The tween concept is identified as a global concept and Australian tweens, particularly girls, are relatively similar to other countries. Tween girls’ culture is captured as universal phenomenon. Their fashion consumption is strongly influenced by the media and their peers in the same way as in other countries.

It is acknowledged that there is no strong distinct local style in Australia within the fashion context. The market is open to other fashion ideas, and thus it is reasonably easy for the market to expand and adapt overseas fashion ideas. This theory gives some indication of the tween’s fashion context, although cultural differences may exist in the tween girls fashion sector. Later chapter (chapter 5) examines and identifies tween girls’ fashion segment in Melbourne.
3. Fashion business in the tween girls demographic: international experience

3.1. Introduction

This chapter explores the Japanese tween girls fashion market to demonstrate the expansion of the market in view of economic, social and cultural influences. In Japan, paradoxically, the declining birth rate has resulted in market opportunities that focus on children. The Global Market Information Database notes of the tween market in Japan, particularly girls, that ‘Fashionable clothing is increasingly popular with tweenagers’ (GMID 2006). This chapter provides an overview of the Japanese tween fashion market, for girls in particular, and uses a case study of a major Japanese company, NARUMIYA INTERNATIONAL Co. Ltd. (From now on referred to as Narumiya), indicating its marketing and promotion strategies, in order to identify characteristics of the tween fashion business models. At the beginning of the market expansion development, the company strategies may fill the gap in the Australian tween girls’ fashion market. This company is appropriate for a case study because it obtained its brand loyalty through unique marketing strategies, as well as its products. Moreover, it became a pioneer in the tween fashion market, for girls in particular, an area in which is considered difficult to be successful in Japan. It will be argued that this model has the potential to become a successful model in Australia and it is useful to analyse the company’s structured details of real or fictional situations.

3.2. An exploration of the key influences in the Japanese tween girls fashion market

3.2.1. Background

The children’s wear market in Japan has developed new brands and new ranges for tweens over the last decade. For the new tween market, the companies in this line of business started by collaborating with the tween fashion magazines in order to merchandise their products and gain ideas from the tweens themselves. In other words, they discovered a potential need for
tween clothing (a gap in the market) and sparked the demand for tween fashion.

Some of these companies succeeded in adding the value of fashion-ability to children's clothing, which had conventionally emphasised function-ability. Even with the decrease in the children's population numbers, tween fashion companies increased their sales steadily. Some of this focused on sales of cheaper tween fashion items through mass retail stores. These stores are similar to Big W and Best & Less in Australia. Others offer higher priced brands that are sold in most Japanese Department stores. In Australia, this would be like seeing a concession store for Country Road for kidswear in Myer. In these companies, particularly for the higher priced brands, the key to success is that merchandising strategies target a niche category of the tween fashion market.

### 3.2.2. Economic influences

According to the Japanese Statistics Bureau, in 2005 children (0-14 years old) made up 13.7 per cent of the population (see Appendix 3). This is the lowest population level since the Japanese Statistics Bureau started. Furthermore, the number of children has been decreasing continuously over the last 28 years. In other words, Japan has a declining birth-rate and an ageing society. People now tend to have late marriages, and the number of married couples who do not have a child is increasing. All these issues affect the very high consumption ability of children, as they can access money from six pockets or wallets to ten pockets, meaning from both grandparents, and uncles and aunts in addition to the parents. Thus children draw rich economic strengths from relatives as well as parents. This is additional evidence to demonstrate the high market potentiality of tween segment. With the appearance of the children with 6 -10 purses, fashion companies started to market to them by dividing the market into narrower age-classifications, which led to the appearance of the tween market.

At a glance, although the declining birth rate is a disadvantage for the tween market, conversely the money spent on the child, as a percentage of per capita, is increasing. Tweens have high consumption ability; therefore, the
possibility of high priced item sales becomes significant. The reason why the
tween fashion market has potential relates to the high price range it can accommodate. The high price is acceptable to the owners of the 6-10 purses; it means that a high profitability for companies in this market can be expected.

3.2.3. Society and cultural influences
The trends of this tween generation are created by the Internet and fashion magazines and by peer pressure. Fashion magazines for this tween age group have become the new information-dissemination tool in recent years, and children are learning about trends mainly from this medium. In addition, they have a good command of the Internet for exchanging information with friends. Its use as an information acquisition tool is expanding; consequently the fashion magazines which target the tween generation are increasing. Through the popularity of these fashion magazines, fashion information becomes easily transmitted to the tween generation. In addition, the models used in the magazines are themselves tweens, giving a feeling of solidarity with the readers and raising interest and attention. The identification with the magazine community of tween girls is a factor of market strengthening.

According to the census of the Ministry of Internal Affairs and Communication that is carried out every five years (2001), the relationship between parents and children has become closer as the gap in their attitude about lifestyle shrinks. It may indicate that children’s lifestyle has becoming closer to the way of the adult’s lifestyle. For example, the numbers of items, such as a mobile phone that was once considered by parents to be too luxurious an item for a child, has decreased. In addition, even the control of children’s TV viewing has lessened. Moreover, the survey revealed that parents who have 10 – 15 year old children spend most of their time shopping with them, second only to having meals and talking or watching TV. The relationship between mother and daughter is especially strong as they are better able to communicate and share a domestic lifestyle (Ministry of Internal Affairs and Communication 2001). As an example of this lifestyle, it is suggested that mothers and tween daughters often shop together, and this new market, termed the ‘M&D market’, which targets the mother and daughter relationship, is gaining attention (Asahi Shinbun Publications 2007). The influence from parents, especially the mother, is also a factor in the tween fashion market expansion. Mothers spend large
amounts of money on fashion for their daughters. Tweens are encouraged to develop an interest in fashion by their fashionable mothers, who spent their youth enjoying the fun of consumption in the bubble economy period of 1980-1990. Therefore these children are referred to as ‘bubble juniors’. These mothers want their children to be fashionable dressed and are happy to buy clothing for tweens. Actually, their consumption motivation is now not limited to clothing; it also has extends to stationery and fashion accessories, as well as to furniture, food and digital devices.

The education system might also influence this environment, now that Saturday has been released from the school system and many schools have stopped using uniforms for primary school, the opportunities for leisure and dressing up to go out have increased. Even commuting to the ‘cram school’ is one of the places for a chance to dress up exists. These situations encourage the tween girls’ interest in fashion as well as the growth of the tween fashion business. It results in increased tween fashion consumption.

3.3. Case study: NARUMIYA INTERNATIONAL Co.Ltd.

3.3.1. Setting the scene

Tweens are neither teenagers nor children and they have not been recognised as a market in the last decade. Narumiya identified an opportunity in the children’s wear market, and in 1991 came out with a set of tween brand clothes. At the time, there was no popular brand in this market. At one time, the tween market was called ‘the vacuum market’ or ‘blank market’ in the Japanese fashion industry. Industry observation describes this market as many companies not even attempting to advance into the tween market, because it is too hard to catch the fashion style and taste of this fast growing generation. There are only a few companies that specialise in this segment. In addition, it had not yielded good sales in the children’s clothing section as it was said that the tween body shape changes quickly. Consequently, parents are hesitant to buy premium clothing. Therefore, even just a few years ago there was no popular brand. On the other hand, it is conceivable that new merchandise services may be created for this target group and become
dominant in the market. In other words, this tween market does not have long history; therefore, it is hard to predict what will happen next.

In the tween fashion market, Narumiya is a pioneer and leads the market, using its unique brand concept and marketing strategies. Narumiya has paid attention to this market, even choosing to take many risks. Narumiya performed ‘pop design’ with a colourful range. It obtained sensational popularity rapidly through its use of media promotion, such as young teenagers’ idols for endorsement, fashion magazines and participation style events. Even though most of Narumiya’s products are priced in the higher range, it had increased sales by appealing both to parents and to tween consumers themselves and gained the attention of this market. It is achieving success in its business, especially in the department stores. Narumiya has been able to establish something like a monopoly in this niche (see figure 3.1).

**Figure 3.1**

**Market Positioning**

<table>
<thead>
<tr>
<th>Sales Ranking by Sales Channel</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department Stores</strong></td>
</tr>
<tr>
<td><strong>NO</strong></td>
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<tr>
<td>------</td>
</tr>
<tr>
<td>1</td>
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<tr>
<td>2</td>
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<td>9</td>
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<td>10</td>
</tr>
</tbody>
</table>

<p>| <strong>Retail Stores</strong>               |</p>
<table>
<thead>
<tr>
<th><strong>NO</strong></th>
<th><strong>Company</strong></th>
<th><strong>Sales</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Narumiya International</td>
<td>5,010</td>
</tr>
<tr>
<td>2</td>
<td>Miki House</td>
<td>3,566</td>
</tr>
<tr>
<td>3</td>
<td>Fusion Utagi</td>
<td>3,225</td>
</tr>
<tr>
<td>4</td>
<td>Kurohito</td>
<td>2,620</td>
</tr>
<tr>
<td>5</td>
<td>Rio Yokoyma</td>
<td>2,575</td>
</tr>
<tr>
<td>6</td>
<td>Little Andersen</td>
<td>2,492</td>
</tr>
<tr>
<td>7</td>
<td>Tinkerbell</td>
<td>1,927</td>
</tr>
<tr>
<td>8</td>
<td>Marutaka Ino</td>
<td>1,684</td>
</tr>
<tr>
<td>9</td>
<td>Years Army</td>
<td>1,465</td>
</tr>
<tr>
<td>10</td>
<td>Boo Foor Wei</td>
<td>1,303</td>
</tr>
</tbody>
</table>

*Sales in Million Yen (as of 2003)

(Source: Narumiya International Co. Ltd.)
3.3.2. Company structure

Narumiya has its headquarters in Tokyo, Japan. This company is principally engaged in the manufacturing and selling of children and ladies wear. The operations are carried out through the following divisions: junior brands, baby toddler brands, young lady brands, royalty income and others. The children's wear is categorised according to three groups: clothes for babies (from zero to two and a half years old); clothes for toddlers (from three to nine years old); and clothes for juniors (from eight to fourteen years old). This last group is close to the working definition of tweens (see figure 3.2). The ladies wear targets customers from their late teens to mid 20s. Narumiya’s children’s wear products are sold under the labels of Angel Blue, Mezzo Piano, Pom Ponette, Daisy Lovers, Blue Cross Girls, Blue Cross and Mini-K. The company distributes its products through department stores, specialty stores and boutiques. Narumiya is also involved in the licensing business, including the provision of shares in the Company's trademarks, the collaborative development of products (NARUMIYA INTERNATIONAL 2006).

Narumiya is a leader in the Japanese children’s wear industry and is one of the largest children’s clothing companies in Japan by sales. Narumiya brands are not limited to clothes; it has also been energetically acquiring licensing rights to branch out into collaboration products such as stationery, footwear, food, personal computers, desks, accessories, cosmetics and other items for toddlers and tweens. After having reached the top in Japan, Narumiya is conscious that it needs to establish itself overseas, because there are limited possibilities for growth in the Japanese domestic market as the Japanese birth rate is declining; it has already tapped the wealth surrounding tweens.

Narumiya opened its first store overseas in Hong Kong in 1995 and then, South Korea in 2003. By May 2007, Narumiya had nine stores in overseas countries - in Korea, Hong Kong, Malaysia and Taiwan (This information was obtained by email on 25th May 2007). Unlike in Japan, many of Narumiya’s customers in other Asian countries are not children but women in their early or even late 20s. Sales in these countries are robust despite the prices of the clothes being around 10 per cent to 20 per cent higher than in Japan (Web Japan 2005). Narumiya is planning to take Mezzo Piano and Pom Ponette brands to the UK market in the near future. Narumiya expects a high demand from the UK market because there are few brands which specialise in the
tween market and there are also many wealthy tourists who from the Middle East and Northern Europe. In addition, it is planning to advance to Asian countries such as China, Thailand and Indonesia and also plans for positive development into the USA, Canada, and other European countries (Oyama et al. 2003). Narumiya sees opportunities overseas as well.

Figure 3.2

Narumiya Original Brands

(Source: Narumiya International Co. Ltd.)
3.3.3. **Product**

Narumiya has five brands for girls and one brand for boys. Each brand has a clear concept to distinguish it from the other brands. The focus of this thesis is on the girls’ brands.

The following is Narumiya girl’s brand concept:

**Angel Blue:** ‘Pop’ and cute designs for an energetic young girl. It is a sporty concept mixed with seasonal trends. The brand features is perfectly suited to a casual scene. It is used of refreshing and vibrant colours, such as rich turquoise. It makes girls look cute, full of life, and sporty (see figure 3.3-3.7).

**Daisy Lovers:** This presents the image of the beach girl. Designed with a witty, fun Hawaiian touch with mixed with trends. Colourful rainbow and hibiscus are used as motifs. Trendy, seasonal collections of apparel perfectly fit for "a girl's day out in the sun" (see figure 3.8-3.12).

**Pom Ponette:** This is the brand for the girl who wants to give a high-class impression of a French style. Taste is mixed with a sense of Parisian mood. Pom ponett accents a classy French look with mainly pastels and monotones colors. It shows subtle good taste. Poodles, Yorkshire terriers and Chihuahuas are used as motifs. Warm pastel tones and soft materials add a feel of comfort and sophistication (see figure 3.13-3.16).

**Mezzo Piano:** This style is for the girl who likes to wear elegant and romantic outfits. It has a distinctly European flavor, with a focus on pink and lush romantic overtones. The brand has a more romantic, ladylike range. They have a formal dress line as well a casual style which is sweet, almost angelic (see figure 3.17-3.21).

**Blue cross girl:** This style is not at all sweet, but rather ‘cool’. It features collections of street wear for wild young hipsters. The image is like American street casual. It is casually adorned with various animal characters to highlight the vividness and vitality of kids (figure 3.22-3.25).
Figure 3.3

Figure 3.4

Figure 3.5

Figure 3.6

Figure 3.7

(Source: Narumiya International Co. Ltd.)
Figure 3.8

Figure 3.9

Figure 3.10

Figure 3.11

Figure 3.12

(Source: Narumiya International Co. Ltd.)
Figure 3.13

Figure 3.14

Figure 3.15

Figure 3.16

(Source: Narumiya International Co. Ltd.)
Figure 3.17

Figure 3.18

Figure 3.19

Figure 3.20

Figure 3.21

(Source: Narumiya International Co. Ltd.)
Figure 3.22

Figure 3.23

Figure 3.24

Figure 3.25

(Source: Narumiya International Co. Ltd.)
One of the most obvious characteristics of Narumiya products is that each brand has its own logo and characters (see figure 3.26-3.28). These are either printed on or appliquéd onto the garments. Also it produces its own printed fabrics and it has detailed individuality of design and embellishment such as added lace, embroidery and original printing. Basically, Narumiya’s products use mainly bright colours like the colours of bubble-gum. Another feature is its exclusive value. It has many limited editions such as store limited editions and events edition. Its ideas come from children who do not want to wear the same as everyone else, children who want to be individual. Narumiya believe that high added-value fashion is the key to the tween fashion markets in the same way as it is in the adult market.

Narumiya forms a design team for every brand and is fast in tackling product development to maintain a quick response to the savvy tween customer. It aims to keep developing new merchandise that captures children’s hearts; otherwise the tween customer will shift to another brand.

Narumiya actively seeks children’s opinions. It collects design ideas from design competitions in the stores and on its web site, as well as from the seasonal exhibition and other events. It collects nearly 20,000 children’s opinions each year. Narumiya has tween monitors at the exhibition and extracts their opinions. It also actively accepts 20 to 30 school excursions to exhibitions each year. This is a clever approach and has given Narumiya an advantage in this market because it knows its audience.

Figure 3.26
Figure 3.27

Figure 3.28

(Source: Narumiya International Co. Ltd.)
3.3.4. Promotion

Narumiya’s main promotion characteristic is to have children participate in style promotions such as fashion shows, design contests and hair and make-up events (see figure 3.29). Narumiya’s promotions have a strong collaboration with media, department stores and the companies associated with the tween market. These promotions aim to distinguish it from the other companies and give awareness of Narumiya brands to tweens.

Figure 3.29

Sales Promotion

“Surprises” Change “Customers” to “Fans”

Original Fashion Shows

Original Events

Original Character Shows

Hair & Make-Up Events

Original Premium Gifts

(Source: Narumiya International Co. Ltd.)

The main Narumiya promotion is the fashion show. It is said that thousands of tweens come to the fashion show, which presents charismatic models in order to create exclusive value for these events. After the fashion show, these events usually have photo and autograph sessions with the models. These sessions are only available to customers who spend a set minimum amount of money. This system works to strengthen customers’ bonds with the brand and taps into their spending power. Photos and advertising from the fashion shows are featured in magazine articles. The children who are featured in the magazine will buy the magazine. Even children who are not in the magazine read it and they want to be in it, and so they come and join the next event.
This cycle works to gain popularity for Narumiya. Actually this is a policy of the company’s president: ‘make a fan of Narumiya’. The aim of the event is not only to increase the store visitors but also to increase the popularity of the brands. The event provides a place for tweens to have contact with the models that they admire. Narumiya can use these events as a means of creating brand loyalty.

Other interesting events promotions include ‘Cinderella auditions’ and ‘Dream projects’. ‘Cinderella auditions’ are auditions for Narumiya models which are featured in magazines and in its catalogue (see figure 3.30-3.31). Usually these auditions collaborate with a talent agent, so that champion ‘Cinderellas’ have an opportunity to become an actress, singer and so on. ‘Dream projects’ provide one-day job experience for participants (see figure 3.32-3.33). For example, Japan Air Line (JAL) gives opportunities to observe pilots and cabin attendants. The Japan Philharmonic orchestra gives music lessons and allows attendance at rehearsals. HONDA offers the experience of driving at the Suzuka circuit and meeting famous drivers. These promotions create a strong impression on the tweens, and their parents, and make Narumiya recognisable. Many events are held in collaboration with fashion magazines, and tween girl readers who want to wear the same clothes that the models wear in the fashion magazines.
Figure 3.32

Figure 3.31

(Source: Narumiya International Co. Ltd.)
3.3.5. Merchandising

Narumiya’s main distribution channels are all the major Japanese department stores that are under direct management (in-shop style), like Sportgirl or SUPRÉ are here in Australia. Therefore, all product deliveries and store merchandising comes under the head office management. There are approximately 900 stores and more than over 2,000 accounts in Narumiya’s wholesale business (October, 2004). In addition, Narumiya is in the process of expanding into shopping malls as new distribution channels, because, by being located in suburbs, it allows be easier access for more consumers. Moreover, entertainment facilities such as theatre and bowling are set up as annexes to shopping mall centres, leading consumers to visit there more frequently. Department stores are Narumiya’s major distribution channel. In department stores, it creates a ‘junior city’ where Narumiya brands are in one area in the children’s wear floor. Narumiya’s store spaces are developed in terms of taste, brand and accumulate not only clothes but also fashion goods such as bags, accessories and also stationery and cosmetics. The aim is to create a space that children will be attracted to.

All sales staff who work at Narumiya’s stores see the products at the seasonal exhibition and understand the products and the season’s concept before the products come to the store and customers. Its exhibition, with samples from the design team displaying the next brand concept and trends, is shown to trading partners such as department stores, boutiques and magazines by a coordinated team which administers the area between the design team and the stores. Most products are manufactured on order and therefore are small batch productions, not mass produced.

Narumiya’s policy for retailing is to ‘make fans for Narumiya’s brand’ not ‘selling products’, which means that it aims to make a connection between the brands/stores and the tween customers. Sales staff in stores communicate with tween customers directly and offer services to them in the same way as for adults. Narumiya believes this style forges a strong connection between the brand and the tween customer.

Narumiya has also energetically acquired the licensing right to branch out into collaboration products. Narumiya has accomplished its role in the tween market and is advancing into other fields besides children’s clothing. Its
business strategy is to create Narumiya original products for the whole tween lifestyle, not just children's clothes.

3.4. Conclusion

Narumiya has been successfully leading the tween girls fashion market in Japan, using originality in its products and marketing strategies. It has created brands to attract tween girls. Moreover, the brands power has broadened and Narumiya has collaborated with many well-known brands such as McDonalds, Lotte (well-known confectionery company in Japan) and Wacol (well-known Japanese underwear company). This has been a benefit because these collaborations have brought strong recognition of its brands to the tweens as well as to broader society.

The interaction between the company and the tween girl consumers leads to the creation of brand loyalty. Narumiya substantiates that brand loyalty; in its words, ‘make a fan of Narumiya’ is a key to success in the tween girls' fashion industry, as well as product quality and fashion-ability. As the literature review reveals, the media and peer pressure are keys to driving tween girls fashion consumption. Narumiya uses the media to advantage with its marketing strategies and this has attracted tween girls' interest in the brands. Moreover, this media coverage encourages conversation around fashion issues among the tween girls age group.

The Narumiya experience is easily adapted to the Australian tween girls fashion industry. Based on creating marketing strategies, it is available and has the potential to be identified in the Australian tween girls fashion market. It could be a potential model for the market to copy. Fashion trends and cultural trends transform themselves differently in different locations; however, the tween girls’ culture can read as a global phenomenon and the marketing strategies for the culture might be universal.
PART B: Research design, analysis and discussion

4. Research design

4.1. Introduction to data analysis

The aim of this chapter is to analyse the tween girls fashion consumption situation with a particular focus on Melbourne. Due to the lack of sales statistics which focus on the tween girls sector, it is not possible to obtain exact data and there is no information about market size that the researcher can access. Consequently, the analysis in this section is based on survey results and interviews. This research design is based on the qualitative interpretative approach (Holloway 1997; Silverman 1985). To analyse the data and investigate the research objectives, this approach seems most appropriate for this research. The qualitative interpretative approach is a research method used particularly in social science fields to gain insight through subjective analysis. It is a method by which well-grounded information from sources such as interviews and surveys is gathered and examined (Holloway 1997).

Each interview’s comments and survey results are cross analysed in order to understand them in-depth. The aim of the interviews and surveys was to increase the understanding of the phenomenon of the tween girls fashion consumption and the fashion industry in Melbourne. The purpose of the qualitative interpretative approach was to investigate the main research objective, that is, to understand the characteristic traits of the Australian tween girls’ demographic with respect to fashion marketing and consumption, and to identify the gaps or opportunities in this market group in Melbourne.

In the process of this research, the research title changed as the angle of this research having shifted. Primarily, the research aimed to argue that there are opportunities to obtain market acceptance for overseas brands in the Australian tween fashion industry, particularly in Melbourne. Identifying the particular products and marketing strategies of the Japanese company, Narumiya, in order to assess opportunities and barriers for the development of brand loyalty was a focus at that stage. There is no longer a need to use the Japanese tween brands
company as a case study to identify their opportunities for success in the Australian market; however, the current focus means that the case study of the one company is used simply to illustrate the tween girls’ fashion industry situation in Japan as a representative business example and model in my research. The research now examines more closely the current tween girls fashion industry in Melbourne with a view to identifying business expansion opportunities within the present situation. Therefore, the working title at the stage of ethics approval for the interviews and survey was different from the present formal research title (see Appendix 2 and 3).

4.2. Sample groups

This research involved two sample groups: industry professionals and parents of tween girls who are aged between 8 and 14 years old.

The survey of the tween girls’ fashion consumption has provided a rich description of tween girls fashion consumption practices. Although the number of active respondents was insufficient to define tween girls fashion consumption in Melbourne. It has provided an indication rather than evidence. This survey is directed to tweens’ parents to capture their view. Of the 70 questionnaires sent out, there were 30 valid responses to the survey. The surveys indicate what tween girls buy and how and where they shop, as well as how much they spend on fashion consumption. In addition, it shows the key influences driving their fashion consumption.

The interviews with industry professionals were essential to answer the research objectives, to identify the gaps or opportunities in this market group in Melbourne, as well as to understand the characteristic traits of the Australian tween demographic with respect to fashion marketing and consumption. The interviews contained five parts, took less than one hour to complete and consisted of 10 semi-structured questions on issues to do with the tween fashion industry.
4.3. Developing the survey - for parents

The survey was conducted with tween girls’ parents as opposed to asking the views of the children themselves. It is acknowledged that there are ethical and practical challenges involved with researching young children. The children may feel that they are being ‘tested’ and this may affect their responses. It is expected that their ability to articulate their attitudes and opinions about the fashion consumption and brands would be limited.

The survey participants were chosen from a variety of suburbs (see Appendix 6) and also collected from different demographics, social and cultural backgrounds to make a non-bias result. The original survey sampling approach plan was through schools to tweens’ parents. The researcher approached schools through the researcher’s social network; however, the permission from schools was not obtained. Therefore, the participants were approached through the researcher’s social and university networks. In the most usual method of contact, the potential participants were approached by email to gauge their level of interest in participating. In this case, a formal letter with a plain language statement (see Appendix 2) was attached to the email. The other method was distributed through the social networks of the researcher’s friends and acquaintances. Once a positive response had been obtained, the survey was personally delivered to them. The researcher was careful not to distribute it through similar participants of similar demographic, social and cultural backgrounds. Consequently, there is less bias resulting of demographics, social and cultural backgrounds. The survey included a question asking for the participant’s postcode, which shows that there is less bias of the participants’ demographics.

In the process of developing the survey questions, it is acknowledged that within greater Melbourne, there are several types of fashion retail options for tween girls. These options are not examined in terms of geographical area, as most fashion retailers are in chain stores; they are located in several suburbs and seem not to be affected by their demographic environment. Moreover, most suburbs have easy access to main shopping mall centres. All the answer options refer to retailers which are located in shopping malls.

For this survey, the questions were designed in order to obtain and generate qualitative responses. This is made possible by including questions in the survey that are both of a dichotomous (yes or no) nature and multiple choices. A mix of
ranking and category questions is also used with the table question (see Appendix 4). The questions are designed to contribute to an understanding of the topics below:

1. Pressure from the tween
2. Influence on the tween
3. Preference
4. Buying behaviour
5. Brand perception and awareness
6. Expectation of the brand

The results of the survey essentially provide qualitative data for analysis. These results assist in developing basic guidelines of intensive investigation of this research subject.

However, in the absence of permission from the schools which were approached, the sample size is relatively small and consequently the information provided through the survey could be more in-depth.

4.4. Developing the interview-for business

As this research is an industry based study, a significant component of the research has come through interviews with professionals in the Australian fashion industry. Face to face interviews were carried out with participants. The interviews were used to collect information on the current issues in the children’s wear industry, particularly in tween girls’ fashion. The interviews followed a semi-structured questionnaire format (see Appendix 2). The participants were selected from various ranges of professional skills within five major sections involved in the fashion Industry, particularly the children’s wear industry.

1. Department store, supply chain store buyers
2. Retailer owners and /or managers
3. Fashion marketers
4. In-house brand manufacturers
5. Independent designers

The interviewees were approached through the researcher’s social network and the researcher’s senior supervisor’s network as well. Potential interviewees were contacted via telephone or email to gauge their level of interest in participating and then they received a formal letter requesting their involvement in the interviews (see Appendix 2). Once positive responses were obtained, a formal meeting was arranged and a copy of the detailed questions form given to the participant.

The interview topics were designed to investigate issues solely the Australian tween fashion industry. The topics for the interviews were:

1. Position and branding in the current market
2. Sources of style and design
3. Current design processes and marketing strategies
4. Business vision and customer demand
5. Relationship between brand and customer
6. Opportunities and barriers for international brands in the Australian market
7. Prospects of market expansion

The 10 semi-structured questions (see Appendix 5) on issues in the tween fashion industry based on the above topics were designed to obtain interviewees’ opinions about opportunities for expansion and adaptation, and also about the current situation in the industry.

For the interview, references to participant’s names and their organisation were collected but they are not be published without permission and are replaced by a code in the transcriptions to guarantee participant’s privacy.

4.5. Research design overview

This research is following the structure of the research design (see figure 4.1).
Figure 4.1

Step 1
Develop a survey

Step 2
Interview round 1

Step 3
Data analysis and interpretation

Step 4
Interview round 2

Step 5
Interview round 3

Step 6
Reflection and discussion of findings

Step 7
Develop findings into representative model, groups and diagrams
5. Research Findings: Exploring the Australian tween girls fashion market

5.1. Introduction

The aim of this chapter is to examine the research findings by data analysis and to explore the Australian tween girls fashion market. It is divided into two sections: the first sub-chapter 5.2 covers consumer perceptions. It analyse the survey results describing how and where tween girls shop, how much tween girls spend, their interest in fashion and their parents’ view of tween girls clothing issues. The second section, sub-chapter 5.3 investigates a business perception analysis which is based on interviews with industry professionals. General issues in this market are discussed.

5.2. Data Analysis: Consumer perceptions

5.2.1. How and where tweens shop

These questions are designed to investigate tween girls’ preferences in fashion consumption and their consumption habits. The results are presented in the following figures.

1. Where do you most often go shopping for your tween’s fashion apparel products (clothing and accessories)? : Survey question 5
2. Is the place to go shopping your choice or your tween’s choice?: Survey question 6
3. How often do you go shopping for tween fashion apparel (clothing and accessories) products? :Survey question 4
• Where do you most often go shopping for your tween’s fashion apparel products (clothing and accessories)? : Survey question 5

**Figure 5.1**

<table>
<thead>
<tr>
<th>Department store</th>
<th>Target</th>
<th>K-mart</th>
<th>boutique</th>
<th>brand store</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>15</td>
<td>13</td>
<td>7</td>
<td>8</td>
<td>11</td>
</tr>
</tbody>
</table>

• Is the place to go shopping your choice or your tween’s choice?: Survey question 6

**Figure 5.2**

- Parent’s/s’ choice: 60%
- Tween’s choice: 40%
- How often do you go shopping for tween fashion apparel (clothing and accessories) products? :Survey question 4

*Figure 5.3*

![Pie chart showing shopping frequency]

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once a week</td>
<td>17%</td>
</tr>
<tr>
<td>2-3 times in a month</td>
<td>40%</td>
</tr>
<tr>
<td>Once a month</td>
<td>0%</td>
</tr>
<tr>
<td>Once a season</td>
<td>13%</td>
</tr>
<tr>
<td>Once a year</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Consumer habits**

According to the results (figure 5.1), just over half of the respondents go to department stores to shop for tween’s clothing, followed by Target and brand stores such as *SUPRÉ* and Valleygirl. The result can be interpreted as showing that respondents considered boutiques the same as brand stores. According to the results, a majority of respondents selected department stores. This might indicate the department store’s promotion power. Michael Giddes, who is Myer’s national buyer for boys and girls, stated that Myer has created a ‘basement’ section separate from the children’s clothing floor which is surrounded by pop culture and relates to teenage culture as well. This might attract tween girls and give them a shopping experience similar to brand stores.

The answer options for question 5 were categorised according to three different types of shopping choices: Department stores, DDS (Discount Department Stores), for example Target and K-mart, and retail brand stores such as *SUPRÉ* and Valleygirl. From analysis of these three categories, the results suggested that DDS are the most popular places for tween girls clothing. However, they do not show considerable differences between
retailers within the three categories, although the fact that there was a small group of respondents might cause this. It indicates that their shopping destinations are not regular and their selection of the place to go shopping depends on what they buy and the purpose of the products.

The data from question 6 (figure 5.2) indicates that more than half of the responses showed that these places are chosen by tween girls. This result may indicate that tween girls know where they want to go to get their clothing. Or perhaps, this shows the influence of advertising in fashion magazines for tween girls. It shows that they have multiple choices to go shopping depending on what they are going to buy. Certainly, they are not brand conscious but they are style conscious. Thus, the choice of where tween girls shop may relate to price range.

According to the data from question 4, respondents go shopping with moderate frequency. Over half of respondents go shopping for tween girls clothing more than a few times in a month, moreover, one third of respondents go shopping at least more than once a month. This may indicate that there are different type of people who may take them shopping such as grand parents and siblings, perhaps they may be independent enough to go themselves and with friends. This question was designed to reveal whether respondents were interested in consuming fashion generally, and specifically these results show a relatively high tendency for exercising consumer choice by tween girls with their clothing consumption. This result clearly shows an interest in going shopping for fashion products.

### 5.2.2. How much tweens spend

These questions were designed to extract information about tween girls’ shopping for fashion products, as well as their source of pocket money.

1. How much would you spend on fashion apparel products (clothing and accessories) for your tween per month?: Survey question 3
2. How much pocket money does your tween have per month?: Survey question 7
3. What is the source of your tween’s pocket money? Please rank in order of significance.: Survey question 8

4. What does your tween primarily spend their money on?: Survey question 9
• How much would you spend on fashion apparel products (clothing and accessories) for your tween per month?: Survey question 3

**Figure 5.4**

![Pie chart showing spending distribution](chart.png)

- Less than $50: 23%
- $50-$100: 47%
- $100-150: 17%
- $150-200: 13%
- $200-$250: 0%
- More than $250: 0%

• How much pocket money does your tween have per month?: Survey question 7

**Figure 5.5**

![Pie chart showing pocket money distribution](chart.png)

- Less than $20: 39%
- $21-$40: 35%
- $41-$60: 10%
- $61-$80: 3%
- $81-$100: 3%
- More than $100: 10%
• What is the source of your tween’s pocket money? Please rank in order of significance.: Survey question 8

**Figure 5.6**

![Pie chart showing the source of pocket money](chart.png)

- Monthly allowance: 33%
- A present from family: 23%
- Earn through chores: 3%
- Other: 41%

• What does your tween primarily spend their money on?: Survey question 9

**Figure 5.7**

![Pie chart showing the primary spending](chart.png)

- Food: 44%
- Magazines/Book: 17%
- Fashion apparel products: 20%
- Stationery: 13%
- Cosmetics: 3%
- Other: 3%
**Consumer expenditure**

Today's tweens are said to have more disposable income than previous generations. Just about half of the respondents spend on average between $50 and $100 on tween fashion apparel per month. In other words, this may cover the purchase of some garments. $50-$100 on average represents a possible 2-3 garments that are purchased per month. However, it is acknowledged that this analysis is an approximation. The category of less than $50 per month is 23 per cent and $150-$200 come next as 17 per cent. This might be caused by the difference of respondents' demographic environment. Some are more fashion minded as the individuals are willing to spend more in order to wear fashionable clothing and others are concerned to spend only the minimum expenditure.

Survey question 9 is designed to see whether they spend their pocket money on fashion products. Two thirds of respondents show that tween girls' pocket money was under $40 per month. The results show that pocket money is sourced mostly by earning through chores and gifts from the family. As expected by the tween girls's interest in fashion, almost half of the results show that the primary object of pocket money is fashion apparel products. Food and magazines/books came next. The data confirms strongly that tween girls are interested in fashion. This outcome is unsurprising as the literature review (Part A) reveales that tween girls have a significant interest in fashion and a high demand for fashion products, which accounts for the market growth. Moreover, analysing these results with their expenditure for fashion apparel products, the places tween girls go shopping with their pocket money represent cheaper products, as the results of survey question 7 (see figure 5.5) show their pocket money is mostly under $40. This suggests that parents are still strongly involved in their fashion consumption. Although their disposable income is getting higher than previous generations, it is still not enough to buy clothing independently.
5.2.3. Their interest in fashion

These are designed to obtain information about tween girls' interest in aspects of fashion and also to gauge their preference for fashion brands.

1. Is your tween interested in fashion?: Survey question 10
2. What do you find most influences your tween's fashion preferences?: Survey question 11
3. Does your tween have a particular favourite fashion label?: Survey question 12
• Is your tween interested in fashion?: Survey question 10

Figure 5.8

![Pie chart for survey question 10: 90% YES, 10% NO]

• What do you find most influences your tween's fashion preferences?: Survey question 11

Figure 5.9

![Pie chart for survey question 11: 32% TV, 7% Magazines, 7% Internat, 10% Friends, 10% Siblings, 7% Parents, 27% Other, 7% Other]
Does your tween have a particular favourite fashion label?: Survey question 12

**Figure 5.10**

Interest and influence in fashion

These questions are designed to obtain information about tween girls’ interest and influence in aspects of fashion and also gauge their preference for the fashion brands. Predictably, nearly all respondents confirmed that tween girls are interested in fashion.

The research results indicate that tween girls’ interests in fashion are influenced highly by magazines, and friends (see figure 5.9) followed close behind. This result is expected as the literature review (part A) reveals that the media is a significant influence in the culture. The culture is constructed by the media; particularly, magazines targeting tween girls, which are a means for them to get fashion information (Grant & Stephen, 2005). The results of the survey support this theory. The peer group of siblings and friends also strongly influenced tween girls’ fashion preferences and consumption.
Surprisingly, the proportion of the internet as an influence on tween girls’ fashion preference is small (see figure 5.9). The internet has little impact showing only seven per cent choosing it. It may indicate that the internet is an indirect tool for their fashion preference and consumption as they are not able to buy online because they are not credit card holders. The internet is perhaps a tool for tween girls to collect information about fashion trends and products.

Only 39 per cent of respondents confirm they have a particular favourite fashion label; SUPRÉ is resulted as most. The rest of 71 per cent of respondents answered that they do not have a particular favourite fashion brand. This is contrary to the international market situation. This outcome supports the idea that tween girls in Melbourne are more style conscious than brand conscious, as the interviews with industry professionals (refer to 5.3) identified. Within the 39 per cent respondents who have a favourite brand, the main attractions of the brand are friends’ influence, design and brand’s name value. This result links with the result of figure 5.9 strongly. This result may indicate that tween girls are seeking clothing which is fashionable and is considered as ‘cool’ within their peers. It is possible that tween girls have several brands they prefer, but they do not have any one as a particularly favourite one. It is perhaps in a gap in this market that there are no strong brands, which give tween girls consumers’ loyalty towards the brands. It could be identified that the Melbourne tween girl is style focused rather than brand focused. The reasons for this could be that there are multiple brands that offer products with a similar concept and price range. Therefore the brands do not give them distinctive brand perceptions. This may indicate that there is a challenge for the market to establish the bonds between tween consumer and their favourite brand.

The survey result indicate that tween girls’ interest in fashion is high and their consumer power is strong, thus the result indicates a high potential for the tween girls fashion market expansion in Melbourne.
5.2.4. Parents’ view

These questions explored the tween girls’ parental view towards tween girls fashion consumption.

1. Do you prefer a specific brand for your tween?: Survey question 13
2. What three factors do you consider to be most important when purchasing your tween’s fashion apparel products?: Survey question 14

- Do you prefer a specific brand for your tween?: Survey question 13

**Figure 5.11**

![Pie chart showing Q13 with 97% NO and 3% YES]
What three factors do you consider to be most important when purchasing your tween’s fashion apparel products? : Survey question

Figure 5.12

Parents’ preference

The result (see figure 5.11) shows that nearly all respondents do not have a specific brand preference for their daughter. This may indicate that tween girls have their own style already and today’s tweens are at the stage of age where parents can no longer control their daughters’ fashion. However, as mentioned before (refer 5.2.2), parents are still involved in their purchase of clothing and they play an important role in tween girls fashion consumption, therefore parents have the final say about tween girls fashion consumption. Although tween girls are looking ahead to the next generation’s (teens) appearance and are constantly aspiring to the teen’s look, they still look back to their parents for acceptance. Research confirms that the parents are one of the key decision factors when tween girls buy fashion clothing, mothers in particular (Grant & Stephen, 2005).
Question 14 (figure 5.12) investigated the important factors when parents purchase tween girls fashion apparel products. The data demonstrates that price is the most considerable factor for them. Following price, quality and design/style are the second most important factors of concern. These results seem to have no big different to the factors in adult fashion consumption.

In the tween girls fashion consumption, the purchase decisions are commonly made in tandem: tween girl and parents; however, the results reflect parents still hold the purse-strings. Moreover, parents still consider the garment quality even though the tween girls are growing and change their body shape quickly. This implies that Discount Department stores have an advantage as their quality control is stricter than retail brand stores (refer to chapter 5.3). In addition, this result (figure 5.4) indicates that tween girls’ parents rate fashion-ability more highly than function-ability in tweens’ clothing. However, it would seem that good quality clothing seems to have a more modest concept of design.

This question (question 14) was not asked at a level deep enough to explore parents’ consideration of tween girls clothing. It could explore the difference of design which both tween girls and parents want. It is difficult to indicate from this result but perhaps, the design and style parents wants may differ from tween girls want.

5.3. Interviews : Business perceptions

5.3.1. Background
This section explores business perceptions of the Australian tween girls fashion market and analyses the interview results. This section contains five categories which relate solely to the Australian girls’ fashion industry. Interviews were conducted with industry professionals and this information is of particular interest as it has not been possible to extract information about the Australian tween girls fashion market through the literature review.
The Australian fashion market has been facing important changes and challenges in the last decade. Australian fashion culture used to be viewed as isolated and out of touch but these days its unique style and creativity has made Sydney and Melbourne ‘must-visit’ cities on the international fashion circuit (Breward & Gilbert 2006; Tourism Australia n.d; Media Man Australia n.d). Now Australian designers are recognised globally and Australian labels are currently exporting their products and are seen in boutiques and department stores in overseas market such as Asia, Europe and the United States (Austrade 2006; CRETA Australia 2004). These changes have occurred due to many factors such as greater use of the internet, which allows anyone to access information available on designer and/or apparel brands’ homepages. Moreover, anyone can access local and international apparel products that are influenced by world fashion trends.

In line with these developments, there has been a revolution in the Australian children’s wear industry. Some designers such as Fiona Scanlan, Collette Dinnigan, Leona Edmiston and Bettina Liano have started to expand their brands to include children’s wear (Munro 2007), as have mass market companies such as Country Road, Cotton On and Just Jeans. They are not alone, and perhaps they are taking their lead from international brands. Luxury international labels such as Armani, Dolce & Gabbana, Christian Dior and Burberry, all have their children’s ranges. Most of the Australian brands’ products are for toddlers or babies - younger children - not for tweens. This may indicate that the growing niche market for tweens consumers is a potential growth market in the Australian children’s fashion industry.

The Global Market Information Database (GMID) report of 2006 describes Australian tweenagers in the same terms as tweens from other developed countries. They influence household purchasing decisions, are increasingly brand aware and are growing up in a high-tech environment. This highlights the fact that ‘Tweenagers … now have about twice as much spending power as in 1995’ (GMID 2006). According to Insight (SBS, 2nd April 2007), there are more than 2 million tweens in Australia and they are worth an estimated $4 billion to the economy, an indication that this is the time for the Australian children’s wear industry to be celebrating the evolution of the tween segment.
5.3.2. Position and branding in the current market

Through interviews with industry professionals, the characteristics of the tween girls fashion industry in Melbourne became clearer. In this industry, there are a number of categories that are determined by price. It emerges that there are two distinct segments in the tween girls fashion market in Melbourne. One is the segment for tween girls themselves, who go shopping with their girlfriends to get ‘trendy’ fashionable items they have seen in magazines and other media; the other is for mothers who go shopping with or for their daughters. These two market segments require different marketing strategies and marketing concepts. The first targets tween girls themselves, who want to be like celebrities from TV and magazines and enjoy their consumption formed by popular culture. Girls focus on the look and style and follow trends although its prices cannot be too high. SUPRÉ skilfully represents this market segment and is an example of a girls’ fashion retailer business. Its upbeat marketing works to build brand recognition. However the brand is not only targeting tween girls; their primary target is the teen sector. According to the SUPRÉ website, ‘SUPRÉ is the Australia and New Zealand market leader in teen female fashion’.

The other market segment is the so-called middle market, where prices are higher. This includes designer brands which usually sell in boutiques and department stores such as Myer and David Jones. This is where mothers prefer to shop for or with their tween daughters. Therefore, the product designs are more subtle to satisfy the mothers’ sense of fashion aesthetics for their daughter.

According to Vanessa Head from The Walt Disney Company (Australia) Pty Ltd, another segment in the tween girls fashion market is the Discount Department Store (DDS). This appeals to the age group as the price point is affordable for them and, needless to say, for parents as well. The DDS market segment includes Target and K-mart, stores that have been targeting tween girls before the tween market even appeared as a strong consumer power. They have always had sizes in a specialised range for tween girls. They also have licensed tween celebrity brands such as Hilary Duff and Mary-Kate and Ashley Olsen and international tween brands such as Bratz and Disney. This strategy can be their strength, particularly if those brands are featured in the media. This segment could sit between the above two segments because the
prices are not set as high as in the department stores and yet their marketing approach is aimed at both tween girls and parents. Angela Mezzatesta, who recently worked as a supplier for Target, commented that the DDS has a strict policy towards such designs and logos on clothing that may be considered inappropriate for tween girls. For example, while in retail brand stores it is possible to find T-shirts with an inappropriate logo printed boldly on the front, they could never be found in a Target store.

According to Michael Geddes, the national brand buyer for girls and boys from 3 to 16 years old at Myer, there are no well-known national brands besides surf brands in Australia, which occupy an unchangeable position in the market. This is likely related to the Australian beach and surf culture, which has been one of the successes of the Australian fashion industry. Surf brands are familiar and cultivate brand awareness in tweens as well. However, Ms Head stated that the surf brands do not target tween girls as their core customer group.

As an overview of the tween girls fashion market in Melbourne, there are many inexpensive clothing stores that meet tween girls’ demands. However, these stores mostly sell the teenager girls fashion brands or perhaps young adult brands; in other words, they cater to the tween fashion market. In the Australian tween girls’ market, tweens are assumed to be full-fledged consumers and are positioned the same as teenagers. The brands do not target tween girls as the primary customer; originally their primary customer is the teenager or older young adult. This indicates that there is no solid border between teens and tweens in the fashion industry in Melbourne. The tween girls are a spin-off. Thus it indicates that sizes are not suitable for the tween girls’ bodies and designs are inappropriate for the tween girls’ age.

Throughout the interviews, the industry professionals demonstrated that the DDS has more of a national focus compared to the retail brands sector in Melbourne; however, the teenager girls fashion brands or young adult brands inspire tween girls with a sense of fashionability.
5.3.3. **Style and design : Influences**

The following information is an analysis of the style and design influences in tween girls’ fashion from a business perspective. Businesses use trend forecasting services such as WGSN (Worth Global Style Network Limited) to access all the latest international styles and trends. Moreover, they can obtain information, such as sales history, through local retailers in this target market. International companies, such as Disney, have sales histories on product ranges from overseas markets that launch brands before Australia does. Mostly samples come from overseas, such as from the US and Europe. Interestingly, Mr Geddes indicated that the Australian fashion trend for tweens tends to be more European than American. They used to get 80 per cent of samples for the tween section at Myer from the US, but nowadays it has dropped to 50 per cent. It appears that the tween market segment is focusing more on Europe, in the same way as the adult fashion market. In the Australian context, Australia does not adopt world trends immediately, as geographically Australia has opposite seasons to the Northern Hemisphere, where most of the cradles of fashion trends are located. It has been said that Australia has its own fashion style and culture and its adaptation requirements are different. However, this myth is progressively changing nowadays through the development of technology and the increased use of communication tools.

The results of the interviews confirm that the media are a strong influencing factor on tween girls’ fashion. As it expected from the literature review, the interview results determine that there is no difference between Australia and other developed countries in this respect. It is not surprising that tween girls are strongly influenced by the media, particularly American pop star and TV shows. According to Ms Head, fashion trends and celebrities’ looks greatly affect product decisions for tween girl consumers in the same way as adult consumer. Celebrities seem to be universally admired among tween girls. Furthermore it is important that the products align themselves with those trends at the right time as the coolness factor changes rapidly. According to Mr Geddes, some retail brands can duplicate those styles and produce for the Australian market quickly.

Ms Head stated that price is always an important influencing factor, especially within the DDS market. She indicated that parents are hesitant to pay a
premium price for clothing, as tween girls will outgrow the item by the next season. Moreover, she stated that quality control is also a major factor of the DDS market segment that affects product design decisions. She emphasised that retail brands stores would not pass the strict quality control at DDS market stores, as mentioned before (refer to 5.3.2).

5.3.4. Relationship between brand and customer

As expected, the literature review indicates that family dynamics are lately influencing tweens’ consumption. Interviwees confirm that retailers and marketers in Australia, as in other countries, believe that family trends, such as parents and/or caregivers being back in the workforce, mean that they have more money but less time to make all of the purchasing decisions for their children. This trend has impacted on the rising levels of disposable income in this market.

Ms Head confirmed that technology and entertainment are also driving innovation in this market, with the tweens having access to more popular culture influences and trends through the internet and media. Consequently, these tools are effective ways of communication for driven tweens. In addition, Mr Geddes stated that tween girls are more influenced due to media exposure, with even six year olds having opinion about what is ‘cool’ and what is not ‘cool’. They are able to access any information they wish and this drives their consumerism, leading to the fact that they are greatly influenced by what they wear.

Ms Head commented that the tween consumers have very short-term brand loyalty and uses the examples of celebrity brands such as Nicki Webster and Stuff from Hilary Duff. Those brands achieved incredible sale results for the first season and then quickly declined. Mr Geddes emphasized that tween girl consumers of fashion do not show brand loyalty, that it is more to do with the product. Simply, it is more to do with looks and style and sometimes it could be price affected. He added that, dissimilarly, boys tend to favour a specific brand for fashion. All interviewers confirmed that this tween segment, particularly girls, is very fast fashion and fad driven.
Mr Geddes commented that it is possible to create an effective line of communication with tween consumers, with girls in particular, to promote brand loyalty. However, it is difficult as they are more focused on products and styles. They are not concerned with brands in the Australian tween girls’ fashion market. In this case, interviewees agreed that magazines, such as Total Girls and Disney Girls, heavily influence the market. Tween fashion brands need to align themselves with these magazines to engage tween girl consumers.

Mr Geddes confirmed that Myer is trying to focus on better dressing, such as mothers purchasing clothing for their children for special occasions, as Myer is not able to compete with retailers that sell basic garments more cheaply and others that create for all popular culture environments, such as SUPRÉ. Therefore, their point of view concerning their relationship with the consumers is not always centred on the tween girls themselves. This indicates that each category in the Australian tween girls’ fashion industry is positioned to cover each sector.

5.3.5. Opportunities and prospects for market expansion

The interviews revealed that the tween girls’ fashion market is a lucrative segment that was underdeveloped prior to the recent focus. Mr Geddes commented that it is in suitable environment and it is also very profitable; however, he added that businesses cannot cultivate both markets. Either they should focus on the girls’ side or the mothers’ side. They have to target one or the other because the expectation from either side is different. This implies that businesses should make it clear which segment they are trying to target in the market.

Throughout the interviews, the expectation was that overseas brands would succeed in the tween girls fashion market. But success is difficult, which confirms that problems remain from a cost perspective. Ms Head indicated that imported brands are generally purchased by a small segment even in the adult market which has a lot of disposable income and is very interested in fashion. Mr Geddes suggested that for big businesses which have enough money to launch into this market in Australia with substantial marketing budgets, it is possible to succeed in the market. However, usually when products from
overseas come onto the Australian market, prices tend to increase and it becomes hard to sell here. In regarding to inspiration from overseas, Mr Geddes indicated that Asian inspiration has a potential to trickle down to this market segment, because it is basically seen as part of the adult fashion market, specifically the men’s segment. Furthermore, Ms Mezzatesta stated that, from the production side, products from overseas can be more attractive because their production order is larger than that of an Australian company, meaning that they can afford to use more colours for prints and better accessories such as trimmings and finishing on the garments, even at the same cost per garment. This results in better and more attractive products. She confirmed that this is the hardest issue to improve as the Australian market is smaller than that of other developed countries, a situation that will not change. In addition, Ms Head agreed that the products from overseas are appeal to the market if the price range is similar to the Australian market. Geographically Australia is far from both Europe and America but close to Asia. Mr Geddes confirmed that logically it is possible and Australia might be the next place to go. However, this is not yet the time for the tween fashion segment, so it probably would take a few more years. Moreover, interviewees indicated that cultural influences will affect fashion as well.

In fact, the results of the interviews confirmed that the tween fashion market has always been an opportunity and certainly will continue to be a viable consumer segment into the future. Moreover, in the Australian tween fashion market, different types of retailers position themselves differently, such as toward mothers or tween girls themselves. It may imply they have less competitors and it results in less development of marketing and promotion strategies. All of the interviewees implied that it is difficult to change this situation unless big businesses come to the Australian market or businesses start to obtain both mothers’ and tween girls’ attention. They commented that it has potential; however it involves a lot of money and the business should be substantially different from the existing business model in this market. Businesses for tween fashion brands need to understand that they are limited in the time that they will have brand loyalty from their consumer and they will therefore need to devise marketing and product strategies that take this situation into account.
6. Conclusion

6.1. Introduction

This final chapter revisits the initial research objectives for the thesis investigation and explores possibilities in greater depth based on the results of interviews and a case study. The purpose of this research was to develop a comprehensive investigation of expansion and adaptation in the Australian tween girls fashion market, and empirically examine whether a case study assists in explaining variations in the market and gauge the potential from the result of interviews and survey.

6.2. Discussion: Findings

The Australian fashion market for tween girls, aged 8-14 years old in this research, is only beginning to develop. In other words, it perhaps exists but it is in a process of gaining recognition. The analysis presented here provides answers for the research objectives. Tween girl consumers have a well-documented interest in fashion and they are motivated to purchase new clothes. For example, according to Burns’s article, a survey estimated ‘the average tweens has $76 in his or her pocket to drop on fashion every week’ (Burns 2005), and they are spending between $250 million and $1 billion on clothing out of Australia’s $9 billion industry (La Nauze and Rush 2006). Along with this, tweens have disposable income which they are willing to spend on their fashion consumption. Moreover, the survey results demonstrated tween girls’ interests in fashion and their capacity to impact on the fashion industry. The tween girls, therefore, are constructed as curious but also vulnerable for expansion and adaptation in fashion industry in Melbourne. Tween girls should be viewed as an independent and individual consumer group separately from teens and young adult consumer in fashion market. In contrast, they are still not independent in a financial context, which means their parents are still highly involved in their fashion consumption.
The first objective was to understand the characteristic traits of the Australian tween demographic with respect to fashion marketing and consumption. A key finding through analysis of the survey’s result and interviews with industry professionals in the Australian, particularly in Melbourne, is that they are observed to be style conscious rather than as brand conscious. The researcher ascertained that they are strongly influenced by the media and peers regarding fashion aspects. Tween girls enjoy their fashion consumption and they seek the style which they’ve found by media, particularly fashion magazines. Fashion magazines such as Total Girl have a big impact on the tween girls’ fashion discourse. In addition, peer pressure impacts on their fashion consumption to fit in. Tween girls belong to a cohesive group which give them same interests, tastes and knowledge in things, which includes the fashion context. These give them a status ‘fitting in’ within their peer group. This may imply an advantage for fashion brands in how to market and attract them.

In this context, the tween girls are placed at a high value in the fashion industry in Australia as well as international context. However, the tween girls segment has been evaluated by the fashion market globally and arguably their spending power and demands have the potential to expand as a niche market and be profitable. This situation exists despite there being just a few Australian retail stores specifically designed for tween girls.

As a second objective, this research identified the gaps or opportunities in this market group in Melbourne, and investigated the idea that the tween fashion market is considered as a new market in the Australian fashion market and found it has no real standards for targeting the tween girls’ segment. However, Harris states ‘Just as in other countries, Australia has seen changes in the representation and experiences of pre-teenagers that have contributed to a distinctive identity for this cohort’ (2005, p.210). For instance, the survey shows that some brand strategies seem to construct their brand loyalty with tween girl consumers.

From the results of the survey and interviews, it was seen that the tween fashion market in Melbourne can be divided into three types of outlets: the department store, the discount department store (DDS) and the brand retailer. Each outlet has its own role in the market and consumers perceive this. Within these three outlets, in particular in the brands retailers sector, tweens, teens and even young adults
shop in the same stores. This demonstrates that the teenager and young adult brands are leading the tween girls fashion market. Further, the teen and young adult fashion industry increasingly recognizes the need and desire of tween girls to operate in an environmentally and socially responsible way.

In the Australian tween girls fashion industry, particularly in Melbourne, there is no border between tween girls and teenage girls in fashion. It could be demonstrated that tween girls would prefer to look like teenagers. In spite of this, in other developed countries, businesses have found a potential to create a range for tween girls in particular to expand their businesses.

It would be reasonable to hypothesise that this growing market in fashion could make an expansion here in Australia, possibly in a similar way to the existing model in other countries. However, this research demonstrated, it seems that tweens create fashion trends themselves, not retailers and/or brands, and this is the biggest difference in comparison to the tween fashion scene in Japan that was used as a case study in this research (refer to chapter 3). Moreover, the marketing and promotion area in Australia is not developed enough to compare with the Japanese case.

It is assumed that businesses should further realise that the promotion of these activities introduced in the case study (refer to chapter 3) can increase their sales and market share in Melbourne. There is a possible market share available to a company which targets tween girls, particularly one that includes an ethical aspect in their marketing and promotion strategies. However, there are several issues which could be considered the reasons for this failure. The market size would be a major factor. In addition, Australia is far from other countries geographically and so, it is difficult to expand to include another country’s market. This issue is certainly relevant to the marketing and promotion sector. Therefore, within Australia, there could be some limitations to the spending of money in the marketing and promotion sectors.
6.3. Suggestions and recommendations

The third research objective was to propose business opportunities to fill these gaps in the Melbourne tween fashion sector, particularly in the girls’ sector. As a result of the case study and research investigation, some possibilities may be suggested.

To attract the tween girl consumers in order to keep them with a brand, it could be important to commercialise the ‘trendy’ products because they can access and find what is the ‘trendy’ or not. This could apply to any brands for any age in the fashion industry. Particularly targeting the tween girls segment, retailers and business would need to keep up with those who are sensitive to trends and who are not committed to a particular brand. On the basis of this, retailers and the fashion businesses would need to provide a range of fashionable clothing. Perhaps it is preferable for the retailers/brands to be more advanced than the savvy consumer and to take the lead. It could be crucial to do this to be successful in this market line with fashionable range of products.

The case study has shown that the company in focused, Narumiya, works effectively in being successful in the tween girls’ fashion market in Japan. The company’s strategies distinguished them from other brands in the market and created a strong link between tween girls and brands. As the literature review and this research investigation reveal, the tween girl’s culture is conceivably a universal phenomenon. Consequently, the case study model can be considered as a model of a system of marketing and promotion strategies that can be applied to the Australian tween girls’ fashion market. The case study introduced the importance of distinctiveness and value adding. The literature review reveals that the tween consumers have less brand loyalty compared to adults, although brand awareness of the former is quite high. Specifically regarding tween girls fashion, some research shows that they place a high value on brand clothing and style, both of which are perceived as ‘cool’. The tween girls fashion industry in Melbourne may take this idea as an advantage.

The case study has not tested whether it conforms to the Australian market; however, at this stage of market development in Australia, retailers in this market segment seem not to be eager to obtain brand loyalty. Moreover, the tween girls
themselves are not brand oriented. However at the next stage in brand development, brand loyalty could become a focus. Some research and existing businesses in other countries have already examined and found out that brand loyalty is an important factor in fashion consumption. In this case, the material from the case study has perhaps a potential to cater for the development of the tween girls’ fashion industry. This is arguably more suited to the current values and practices in the tween girls market in Melbourne. The research results might suggest that the more retailers play at being brand oriented in the market, the greater the chance that retailers/brands will offer advantages and distinctiveness over their competitors. It concludes by offering new insights and suggestions for fashion retailers to push for greater differentiation and competitive advantage.

This research may suggest that the existing brands which primarily target teenagers or young adults can establish a second brand line targeting tween girls primarily. They could adapt their manufacture line into a tween girls range. Moreover, the brands need to be conceptualised strongly in order to establish brand recognition.

The researcher anticipates that the tween girls fashion market has potential opportunities for expansion and adaptation by development of a new range specialising in tween girls, which neither include teenager and young adults nor younger children. In addition, the marketing and promotion strategies are required to operate strongly for established brand loyalty.

Significant current concerns are the marketing and the sexualisation of children. However, this is not included hence as the issues go far beyond the scope of this research. This research simply investigates the tween girls’ fashion market in Melbourne and assesses the opportunities for expansion and adaptation.

6.4. View to future research

This research investigates the tween girls fashion market in Australia, and in Melbourne in particular. The survey and interview results demonstrated and identified the possibility of expansion and adaptation of the market segment. This analysis leads to the establishment of approaches for further research. This
includes a series of potential research objectives that were not covered within this research investigation; however these would amplify future research.

The data from the interviews and survey revealed that the tween girls’ interest in fashion and fashion consumption is the same as in other countries. In addition, the media and peers greatly influence their fashion interest and purchase of fashion items. However they seem not to be brand conscious, hence brand loyalty towards fashion brands is low. This is in opposition to research in some other countries which demonstrated that tween girls’ fashion consumption is strongly influenced by the brand name and its association. Tween girls may not be the same everywhere and there are some differences in among countries. However, the growth of this demographic consumption worldwide is likely to develop into share a common element.

Future research could seek to identify whether the tween girls in Australia have clear brand loyalty which could be tested in an in-depth case study. Further research should include a focus group; tween girls could be interviewed in order to gather information regarding their fashion consumption and fashion branding in order to achieve in-depth investigation research. The results of further research may provide advantages for each distribution channel in the tween girls’ fashion market to compete with others. Moreover, it could provide guidance for new branding in this market. Further qualitative research could be undertaken demonstrating compatibility when examining the market and it could enhance the benefits of the market development and branding adaptation.
7. Appendices

Appendix 1

年齢（5歳階級）、男女別推計人口
Population Estimates by Age (5-Year Group) and Sex

<table>
<thead>
<tr>
<th>年齢階級</th>
<th>平成20年3月1日現在（確定値）</th>
<th>平成20年8月1日現在（推算値）</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total population</td>
<td>Male</td>
</tr>
<tr>
<td>0 ～ 4年</td>
<td>127,678</td>
<td>62,252</td>
</tr>
<tr>
<td>5 ～ 9年</td>
<td>98,060</td>
<td>50,000</td>
</tr>
<tr>
<td>15 ～ 19年</td>
<td>61,232</td>
<td>3,173</td>
</tr>
<tr>
<td>20 ～ 24年</td>
<td>67,176</td>
<td>3,088</td>
</tr>
<tr>
<td>25 ～ 29年</td>
<td>72,723</td>
<td>3,034</td>
</tr>
<tr>
<td>30 ～ 34年</td>
<td>82,600</td>
<td>4,670</td>
</tr>
<tr>
<td>35 ～ 39年</td>
<td>92,988</td>
<td>4,002</td>
</tr>
<tr>
<td>40 ～ 44年</td>
<td>89,060</td>
<td>4,166</td>
</tr>
<tr>
<td>45 ～ 49年</td>
<td>78,404</td>
<td>4,096</td>
</tr>
<tr>
<td>50 ～ 54年</td>
<td>72,928</td>
<td>3,954</td>
</tr>
<tr>
<td>55 ～ 59年</td>
<td>10,164</td>
<td>4,922</td>
</tr>
<tr>
<td>60 ～ 64年</td>
<td>8,769</td>
<td>4,347</td>
</tr>
<tr>
<td>65 ～ 69年</td>
<td>7,286</td>
<td>4,762</td>
</tr>
<tr>
<td>70 ～ 74年</td>
<td>6,171</td>
<td>3,171</td>
</tr>
<tr>
<td>75 ～ 79年</td>
<td>5,662</td>
<td>2,451</td>
</tr>
<tr>
<td>80 ～ 84年</td>
<td>2,930</td>
<td>1,589</td>
</tr>
<tr>
<td>85歳以上</td>
<td>1,980</td>
<td>919</td>
</tr>
</tbody>
</table>

(再編) 再編後

<table>
<thead>
<tr>
<th>年齢階級</th>
<th>割合 (%)</th>
<th>百分比分布</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 ～ 14年</td>
<td>13.6</td>
<td>13.6</td>
</tr>
<tr>
<td>15 ～ 64年</td>
<td>64.7</td>
<td>64.7</td>
</tr>
<tr>
<td>65歳以上</td>
<td>21.7</td>
<td>21.7</td>
</tr>
</tbody>
</table>

注：
- 喜多高は単位表で示されており、合計の報告と同様の計算が一致しない場合がある。
- 平成17年時点で正確な境界数による人口を基本人口としている。
- 当月の人口（推算値）は、算出基準日を基準日に伴い、当月後に推算値となる。

Note:
- Figures may not add up to the totals because of rounding.
- Based on the Census population of 2005.
- Final estimates for this month's population will be computed 5 months later using updated sources.
Appendix 2

Plain Language Statement to be used in a research project involving human participation for interviews.

Dear Sir/Madam

My name is Yukako Tomari. I am undertaking a Masters program in fashion in the School of Architecture and Design, Portfolio of Design and Social Context at RMIT University. The title of my research is An Investigation of the opportunities for gaining brand loyalty: the case of the Japanese fashion design company, NARUMIYA, breaking into the Australian tween fashion market.

The significance of this research is to discover how the tween fashion market is able to obtain brand loyalty for new ranges from overseas on the Australian market. The emergence of the tween market is one of the latest marketing phenomena. Tween is a remarkable age group spanning various industries on a global scale. Even the fashion industry is not an exception. The fashion industry is still hesitant in introducing new ranges from overseas to the Australian market; however, the new movement in the tween fashion market will help in development of the Victorian Government’s retail strategies – “Melbourne city will be renowned globally as Australia’s leading retail city with an unrivalled retail landscape acclaimed for its diversity and compelling experience” (Melbourne Retail Strategy 2005-2012).

This research aims to Investigate the opportunities for the Japanese design company, NARUMIYA, to obtain brand loyalty in Australia and also to examine and explain their marketing strategies for the tween fashion market with a view to positioning and representing them within Australia. Moreover, this research will identify the gaps in the Australian tween fashion market and also investigate the assimilation and reception of Japanese tween fashion marketing in the Australian market.

The proposed methodology involves conducting face to face interviews with professionals involved in the fashion industry, particularly the children’s clothing industry. Potential participants include different sectors in the fashion industry such as marketers, designers, supply chain managers, buyers, merchandisers and retailers. You have been approached to participate in this research as you have relevant experience and knowledge that can give a real insight into current industry issues regarding the tween fashion market.

You will be required to answer 10 semi-structured questions on issues in the tween fashion industry. You will be asked for your opinion about opportunities and problems for the development of new ranges from overseas, and also about the current situation in the industry. This should take less than one hour to complete. It is also asked that you give written
permission for an audio recording to be made of the interview to facilitate the transcription of results.

The project is for the purpose of research and participation is absolutely voluntary. You are free to withdraw from the project at any time and to withdraw any unprocessed data previously supplied. You are able to view material about your interview at any time. The research outcomes may benefit the fashion industry in general and other fashion relevant business and may not be of direct benefit to you. However, this might be a possibility for you to hear something about my research into the tween fashion market. Participation in this research would reflect well on your company.

The privacy of the information you provide will be safeguarded and the security of the research data is assured during and after completion of the study. The data collected during the study may be published; however, reference to participants’ names and their companies and organizations will not be disclosed at any time.

Mr. Mick Peel from the School of Architecture and Design-Fashion at RMIT University is the senior supervisor of this research. Should you need further information or any question and/or problems may arise concerning this research project, do not hesitate to contact them.

Mr. Mick Peel: 03 9925 3832 or mick.peel@rmit.edu.au

I would be most grateful if you were able to assist me with my research.

Kind regards,

Yukako Tomari

Mob.0433 273 207
Email: yukako.tomari@student.rmit.edu.au

Any complaints about your participation in this project may be directed to the Executive Officer, RMIT Human Research Ethics Committee, Research & Innovation, RMIT, GPO Box 2476V, Melbourne, 3001. Details of the complaints procedure are available at: http://www.rmit.edu.au/hr/hec/complaints
Plain Language Statement to be used in a research project involving human participation for Survey questionnaire.

Dear Sir/Madam

My name is Yukako Tomari. I am undertaking a Masters program in fashion in the School of Architecture and Design, Portfolio of Design and Social Context at RMIT University. The title of my research is An Investigation of the opportunities of gaining brand loyalty: the case of the Japanese fashion design company.

The significance of this research is to discover how the tween fashion market is able to obtain brand loyalty for new ranges from overseas on the Australian market. The emergence of the tween market is one of the latest marketing phenomena. Tween is a remarkable age group spanning various industries on a global scale. Even the fashion industry is not an exception.

This survey is aimed to investigate 'tween' fashion apparel products consumption, particularly for girl. It is aimed at with 'tween' parents as opposed to the view of their 'tween' children.

You will be required to answer 14 questions on issues about tween fashion and the fashion apparel products consumption.

The project is for the purpose of research and participation is absolutely voluntary. You are free to withdraw from the project at any time and to withdraw any unprocessed data previously supplied. The research outcomes may benefit the fashion industry in general and other fashion relevant business and may not be of direct benefit to you.

The privacy of the information you provide will be safeguarded and the security of the research data is assured during and after completion of the study. The data collected during the study may be published; however, reference to participants’ names and their companies and organizations will not be disclosed at any time.

Mr. Mick Peel from the School of Architecture and Design-Fashion at RMIT University is the senior supervisor of this research. Should you need further information or any question and/or problems may arise concerning this research project, do not hesitate to contact them.

Mr. Mick Peel: 03 9925 3692 or mick.peel@rmit.edu.au

Kind regards,

Yukako Tomari

Mob: 0433 273 207
Email: yukako.tomari@student.rmit.edu.au
Appendix 4

Tween fashion consumption survey

Thank you for taking part in this survey. This survey aims to investigate consumption of tween fashion apparel products. The participants are parents of tween-agers rather than tweens themselves.

Please note ‘tween’ in this survey refers ONLY to girls aged between 8 and 14 years.

1. What is your post code?

__________

2. How old is your tween?

_____ years old

3. How much would you spend on fashion apparel products (clothing and accessories) for your tween per month?

   a) __ Less than $50
   b) __ $50 ~ $100
   c) __ $100 ~ $150
   d) __ $150 ~ $200
   e) __ $200 ~ $250
   f) __ More than $250

4. How often do you go shopping for tween fashion apparel (clothing and accessories) products?

   a) __ Once a week
   b) __ 2-3 times a month
   c) __ Once a month
   d) __ Once a season
   e) __ Once a year
5. Where do you most often go shopping for your tween’s fashion apparel products (clothing and accessories)? Please choose two.
   
a) ___ Department store (e.g. Myer, David Jones)  
b) ___ Target  
c) ___ K-Mart  
d) ___ Boutique  
e) ___ Brand Store ___________________ (please specify)  
f) ___ Other _____________________ (please specify)

6. Is the place to go shopping your choice or your tween’s choice?  
   
a) ___ Parent’s/s’  b) ___ Tween’s

7. How much pocket money does your tween have per month?
   
a) ___ Less than $20  
b) ___ $21~$40  
c) ___ $41~$60  
d) ___ $61~$80  
e) ___ $81~$100  
f) ___ More than $100

8. What is the source of your tween’s pocket money? Please rank in order of significance.
   
a) ___ Monthly allowance  
b) ___ A present from family(including grandparents and relatives)  
c) ___ Earned through chores or other activities.  
d) ___ Other _____________________ (please specify)

9. What does your tween primarily spend their money on?
   
a) ___ Food  
b) ___ Magazines/Books  
c) ___ Fashion apparel products  
d) ___ Stationery  
e) ___ Cosmetics  
f) ___ Other _____________________ (please specify)
10. Is your tween interested in fashion?
   a) __ YES                b) __ NO

11. What do you find most influences your tween’s fashion preferences? Select one only.
   a) __ TV
   b) __ Magazines
   c) __ Internet
   d) __ Friends
   e) __ Siblings
   f) __ Parent/s
   g) __ Other __________________________ (please specify)

12. Does your tween have a particular favourite fashion label?
   a) __ YES                b) __ NO

   If Yes, which label is it?
   a) __ Rip curl
   b) __ Billabong
   c) __ Target brand
   d) __ Total girl
   e) __ Bardot girl
   f) __ SUPRE
   g) __ Ruby girl
   h) __ Other ________________________

   What is the main attraction of the label? Please choose two only.
   a) __ Design
   b) __ Brand’s name value
   c) __ Friend’s influence
   d) __ Quality
   e) __ Price
   f) __ Other ________________________

13. Do you prefer a specific brand for your tween?
   a) __ YES                b) __ NO
If Yes, which label is it?

a) __ Rip curl
b) __ Billabong
c) __ Target brand
d) __ Total girl
e) __ Bardot girl
f) __ SUPRE
g) __ Ruby girl
h) __ Other ____________________

What is the main reason why you like the label?

a) __ Design
b) __ Brand’s name value
c) __ Friend’s influence
d) __ Quality
e) __ Price
f) __ Other ____________________

14. What three factors do you consider to be most important when purchasing your tween’s fashion apparel products?
(Please rank from 1-3 with 1 being most important)

a) __ Price
b) __ Design/Style
c) __ Fit/Comfort
d) __ Function
e) __ Colour
f) __ Brand
g) __ Quality
h) __ Size
i) __ Fabric
j) __ Your tween’s preference
k) __ Other ( ___________________ )
Appendix 5

Interview Plan

Relating solely to the Australian tween fashion industry, the topics for the interviews will be:

1. Position and branding in the current market.
2. Sources of style and design.
3. Current design processes and marketing strategies.
5. Relationship between brand and customer.
6. Opportunities and barriers for international brands in the Australian market.
7. Prospects of market expansion.

Potential questions for interviews:

1. Describe the Australian tween fashion industry, in particular in Melbourne. Who is leading in this industry?

2. How do you go about understanding the Australian tween consumer?

3. What are the factors that influence product design decision?

4. Where do you look for relevant trend and market information? In what way do these factors impact on marketing decisions and is there a hierarchy inherent in these factors?

5. What is currently driving brand change and innovation in the children’s wear industry?

6. In your opinion, is the tween market a viable and lucrative segment worthy of pursuit? Why or why not.

7. What recent initiatives have you made to establish brand loyalty with tweens? What have been the strengths and weakness in the recent situation of brand loyalty?
8. How is it possible to create effective line of communication with consumers to foster brand loyalty? What role do brand values or other factors play in tween brand loyalty?

9. What are the opportunities for introducing successful overseas tween brands to Australia?

10. What do you think is the long-term viability of the Australian tween fashion market?
## Appendix 6

### Table of survey participants’ postcode

<table>
<thead>
<tr>
<th>Postcode</th>
<th>Suburbs</th>
<th>Number of participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>3006</td>
<td>Southbank</td>
<td>2</td>
</tr>
<tr>
<td>3021</td>
<td>Albanvale/Kealba/Kings Park/St.Albans</td>
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<tr>
<td>3025</td>
<td>Altona North</td>
<td>1</td>
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<tr>
<td>3028</td>
<td>Seabrook/ Larverton /Altona Meadows</td>
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<td>3029</td>
<td>Hopper crossing/Tarneit/Truganina</td>
<td>5</td>
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<tr>
<td>3030</td>
<td>Derrimut/Point Cook/Werribee</td>
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<tr>
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<td>North Melbourne/Hotham Hill</td>
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<td>Carlton/Carlton South</td>
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<tr>
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<td>Northland Centre/Preston/Preston South/Regent West</td>
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<td>3802</td>
<td>Endeavour Hills</td>
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