

A Study on the Brand Characteristics According to Trends in the Children's Apparel Market

Han, Gyung-Hee

Instructor, Dept. of Fashion Coordination, Suwon Women's College

Abstract

Despite the decrease in the number of children due to low birth rate, the domestic children's apparel market has been achieving steady growth as family income is rising thanks to more opportunities for working women, parents spend more on their children, and they prefer brand products that make their children look special. In addition, the market is suffering from hard competition as large enterprises have joined the race.

The present study purposed to survey the children's apparel market in Korea, which is in a transitional period, and to contribute to the development of the market with Korean brands.

For this purpose, we analyzed the characteristics of children's apparel brands in the 21st century based on the current state of the domestic children's apparel market and, based on the findings, forecasted the future trend of children's apparel brands, suggested improvements for expected problems, proposed standards for coping with changes such as diversification, high quality and differentiation in the children's apparel market, and provided consumers with information on how to purchase products.

According to the result of analyzing the characteristics of children's apparel brands in the 21st century, brands are categorized largely into four types – life cultural brands, functional product brands, character brands and brands advancing to China.

Life cultural brands equipped with all necessities for children are expanding, and with the deepening social problems of environmental pollution and the reduction of the child population, functional products made of environment-friendly materials are spreading widely, targeting infants and children. Furthermore, for extending age targets and diversifying products, children's apparel is using characters. The use of characters is expected to have a considerable effect on the growth of brands because children are more subjective as consumers than before and they are more easily persuaded with characters. Domestic children's apparel brands advancing to China have a high expectation of success in overcoming the limitation of the local market that has reached its peak and growing into global brands.

Korean apparel makers are struggling to overcome the depressed domestic market, to recover consumers' consumption, to cope with market opening, to pursue high value of sensibility and to expand the seniors' market, etc. In this situation, future trends of children's apparel brands will be the expansion of family brands, brand totalization, quality price, niche market (pre-teen market), etc. In response to these trends, we made the following suggestions for improvement.

1. Children's apparel brands are evolving into family brands as well as into total brands through voluming. Today, however, apparel makers are advancing to the children's apparel market with the concept of adults' apparel and, as a result, children's apparel is merely adults' apparel of reduced size, having problems in design, color and materials. Thus, apparel makers must develop design considering the wide range of size and the characteristics of children's apparel, strengthen sourcing abilities to create revenues, and make thorough survey of customers to find common denominators between adults' apparel and children's apparel considering that characteristic that the target class is different from the buyer class. Furthermore, they must make active investments in human resources, develop outstanding products through advanced planning and design, and support marketing techniques and management systems to stores.

2. As the declining birth rate will continue to have a negative effect on the market, it may be difficult to expand the market size but there is still a margin for growth through high-sensibility and high-quality products. The competitiveness of brands is determined by their market shares. Accordingly, concepts should be specialized according to lifestyle, customers' diverse needs should be satisfied, and cross-coordination should be achieved within a brand.

3. Considering Korean parents who do not spare investment in their children despite shrinking consumption, functional products must be high value-added goods that can enhance efficiency. However, in the current situation of the infants' apparel industry where a textile manufacturer supply its products to multiple brands, it is difficult to develop unique products only based on materials. Thus, it is considered urgent to appeal to consumers not by relying on materials only but by finding methods of applying their own characters to children's dress.

Key Words : fashion industry, children's apparel market, taste, quality Price

I . Introduction

In the contemporary fashion industry, Korean consumers' clothes purchase pattern is changing according to their desires influenced by fashion information distributed through various cable channels and the trend of internationalization. In addition, demands for sensibility in the society are creating new

markets and apparel manufacturers are responding to such demands flexibly by displaying products in channels frequently visited by customers. Particularly in the domestic children's apparel market, parents' willingness to invest for their children has been enhanced as the economic power of each family has increased because women

have more opportunities for working while the number of children decreased due to low birth rate. As a result, parents are more inclined to buy brands that can make their children look unique. For this reason, the kid industry targeting children is growing steadily, and large enterprises are joining in competition for the children's apparel market. This trend is increasing demands for high-quality and high-price elegant items and expanding the market size.

The present study purposed to understand the trend of the domestic children's apparel market which is in a transitional period, by investigating and analyzing the current state of the market. In addition, this study analyzed opportunities and threats to contribute the development of children's apparel market in Korea through creating new markets out of competition.

As for the contents of research, we classified the marketing characteristics of domestic children's apparel brands according to lifestyle based on the results of analyzing the trends of children's apparel market in Korea during the period from 2001 to 2005, and based on the findings, forecasted the future trend of children's apparel brands, made suggestions for solving expected problems, proposed standards for coping with changes such as diversification, high quality and differentiation in the children's apparel market, and provided consumers with information on how to purchase products.

II. Theoretical background

1. Children's apparel and its development process

From ancient times to the Middle Ages and the Renaissance, children's clothes had been just adults' one of reduced size without consideration of children's activities and attitudes. Children's characteristics according to their age and developmental stage were ignored and parents dressed their children with clothes of the same color and style as adults¹⁾.

By the influence of the enlightenment movement led by Jean Jacque Rousseau in the 18th century who said, "Children must also be respected as a personal being," however, people came to have a new attitude toward children. As a result, dress style unique to children appeared, distinguished from adults' one.²⁾

The origin of Ready-made clothes for children was Louis Borgenicht in 1880 who began to sell aprons made by his wife. As he made a measurement table for aprons and achieved success, apparel of reasonable price began to substitute for expensive tailor-made one and children's apparel began to be mass-produced.³⁾

From the 19th century children's apparel became diversified and evolved into one suitable for children, and from 1914 mass-production system was completed.⁴⁾ However, the full-scale development of ready-made clothes for children began in the late 19th century, later than that for adults' dress, and got on the track in the 20th century. From that time on, the unique characteristics of children's apparel were recognized and the style of children's dress manufactured began to reflect consumers' tastes.⁵⁾

The children's apparel industry in Korea began in the form of ready-made clothes in

the mid-1950s and the number of children's apparel manufacturers increased in the 1960s, surrounding traditional markets. It was from around 1970s that manufacturing factories in the form of enterprise began to be erected.⁶⁾ The concept of design was introduced and measurements were standardized in the 1980s and, as a result, people's perception on children's dress was changed. In the 1990s, brands were sub-divided and diversified by price and age.⁷⁾ Finally, the children's dress industry came to play an important role in activating the apparel industry.

Children's apparel has significant influences on their character formation through their growth from birth to childhood, adolescence and adulthood. Experiences that children obtain from wearing clothes in their babyhood affect their sensible abilities, cognitive development, character formation and social behavior.⁸⁾

The definition of infants and children by age is different among scholars but in Korea childhood defined by the Education Act is the age for attending the elementary school, namely,

the period from 6 to 12 when children experiences rapid physical, social and emotional development. In general, children at the age of 1~3 are regarded as 'infant', those at 3~6 as 'toddler' and those at 7~12, namely, the school age as 'child'.⁹⁾

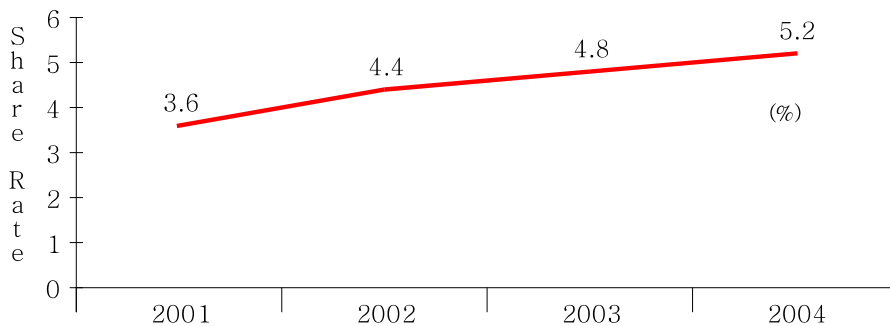
2. Children's apparel market in Korea

1) Size of children's apparel market

In this research, we investigated the market of children at the age of 0~13, dividing it to infants' apparel (0~3) and children's apparel (4~13) markets.

The size of children's apparel market this year was 1094 billion won, 27.8% larger than that in the last year. The annual spending on clothes per child (0~13) increased from 66,300 won in 2001 to 199,600 won in 2003, tripled in two years¹⁰⁾.

The size of infants' apparel market (0~3) in this year was 304.7 billion won (2004), 4.9% larger than that in the last year. Although the infant population has been reduced because



<Figure 1> Market Share Rate in Children's Apparel

many families have just one child, the sales of infants' apparel has increased due to more spending per child and the rise of price. (Figure 1) shows changes in the size of children's apparel market. Since 2001, it has grown little by little without significant change in percentage at 4~5%. In 2001, its percentage was 3.6% and the amount of sales was 650.8 billion won but in the last year the market was expanded to 5.2% and 980.3 billion won, achieving a growth by 50.6% in sales¹¹⁾.

<Table 1> shows the market size of children's apparel based on the volume of consumption surveyed by Korea Federation of Textile Industries. As for children's apparel the market size for children at the age of 4~8 shrank to 421 billion won (2004), 22% smaller than that in the last year, and the market size for 9~13 expanded to 469.9 billion won (2004), 7.2% larger than that in the last year. The market size for 14~18 was 578.4 billion won (2004), 7% larger than that in the last year. In this way, the size of children's apparel market is achieving steady growth although the child population is decreasing, and the growth was particularly remarkable in the junior market.¹²⁾

<Table 2> shows the size of children's apparel consumption by distribution channel surveyed by Korea Federation of Textile Industries. The whole market size did not change much but the volume of consumption by distribution channel showed big differences.

The infants' apparel market (0~3) of around 300 billion won was reduced by 10.3% from 339.5 billion won in 2001 to 304.6 billion won in 2004. By distribution channel, the percentage of discount stores increased by 8%, showing the most remarkable growth, and the percentage of special stores and non-stores also increased by 3%. On the contrary, the percentage of traditional markets was 37% in 2001 but, decreasing every year, was reduced to 25% in 2004.

In case of children's apparel market (4~18), the whole market size is around 1.4 trillion won. By distribution channel, traditional markets occupied 32% in 2001 but their share decreased to 16% in 2004. The percentage of discount stores increased from 7% to 17% and special stores also achieved a growth by 4%. The sales of department stores in 2003 decreased by 21% compared to that in the previous year but they restored the original position in 2004, making a significant growth up to 43.7%.

<Table 1> Market size by age

(Unit: billion won)

Age	2001	2002	2003	2004	Growth rate(03/04)
0~3	339.6	333.3	290.4	304.6	4.9%
4~8	504.5	495.7	540.1	421.0	-22%
9~13	465.7	419.5	438.3	469.9	7.2%
14~18	508.2	546.5	494.4	578.4	17%
Total	1,818	1,795	1,763.2	1,773.9	-0.2%

<Table 2> Market size by distribution channel

(Unit: billion won)

Market		2001	2002	2003	2004	Growth rate	Percentage (2004)	Percentage (2005)
Size of infants' apparel market (0 ~ 3) by distribution channel	Department store	102	84.2	74.6	77.9	4.5%	26%	30%
	Discount store	32.6	53.9	49.2	55.9	13.5%	18%	10%
	Outlet	10.8	12.9	13.8	15.9	15.2%	5%	3%
	Special store	60.5	60.6	48.4	64.1	32.4%	21%	24%
	Traditional market	125.9	115.1	88.5	74.5	-15.8%	25%	32%
	Non-store	7.7	6.6	15.9	16.3	2.9%	5%	3%
	Total	339.5	333.3	290.4	304.6	4.9%	100%	100%
Size of children's apparel market (4 ~ 18) by distribution channel	Department store	462.2	419.2	329.3	473.2	43.7%	32%	31%
	Discount store	108.2	175	286.8	242.2	-15.5%	17%	7%
	Outlet	47.2	60.7	79.6	48.8	-38.7%	3%	3%
	Special store	348.4	401.7	442.2	403.4	-8.8%	28%	24%
	Traditional market	461.8	374.6	290.4	248.7	-14.3%	16%	32%
	Non-store	50.6	30.6	44.5	53.0	19.1%	4%	3%
	Total	1,478.4	1,461.8	1,472.8	1,469.3	-0.2%	100%	100%

2) Trend of the children's apparel market

Because of the increase of women's social activities, changes in economic condition, low marriage rate, etc., the birth rate has been decreasing continuously and, as a result, the volume of the children's apparel market is decreasing but the market value is increasing, showing bipolarization between top-quality brand products and low-priced real-worth products.

<Table 3> shows new children's apparel brands by year. The number of new brands was 7 in 2001 and 19 in 2002, suggesting that interest in the children's apparel market

was heightened in the fashion industry from 2002. Brands launched in the first half of 2002 were 'Tiny Bay' and 'Basic Elle,' which were for discount stores, and those launched in the second half of 2002 were 'Rugrats,' 'Barbie,' 'Soljeny,' 'Ocean Sky,' etc., which aimed at discount stores and chain stores. This shows that distribution through discount stores was spotlighted in 2002 and many new brands were launched for discount stores. In addition, toddlers' brands emerged as major leaders in the children's apparel market beginning with 'Minimang,' 'Katamini' and 'Disney Small World' in 2002 and 'Moitz,' 'Motzmo' and 'Miki Club' in 2003. As market

<Table 3> New children's apparel brands by year¹³⁾

Season	No. of brands	New brands		
		Infants' apparel	Toddlers' apparel	Children's apparel
2001 S/S	4	Mink Mui		DKNY Kids, Tamihillfiger, Neoplastic
2001 F/W	3			Nine Kids, Nono, Young Versace
2002 S/S	6	Tiny Bay, Basic Elle	Omoroi	Top Blade, Budeulbudeuldog, Harry Porter
2002 F/W	13	Etwa, Primiejure	Rugrats, Putibato, Minimang, Katimini	Maruai, Ocean Sky, Joff Junior, Chikiduck, Miao, Barbie, Soljeny
2003 S/S	7	Bebeanshu, Alponso	Totoheros, Florian	Levis Kids, Jean Franco Pere, Michiko London Kids
2003 F/W	8		Disney Small World	Bean Pole Kids, Andre Kim Kids, Dior Baby, Quick Silver, Boys and Girls, CP Company Under Sixteen, JCB, Tuna
2004 S/S	12	Alloanlu	Moitz, Motzmo, Neko, Miki Club	Burberry Children, DKNY Kids, Junior City, Hour Que, Mashimaro, Cavalry, Angels, Trussardi Kids
2004 F/W	6		Heimbell	CK Jean Kids, King Cow, Eskada Kids, Airwalk Junior
2005 S/S	10		Osikosibikosi, Katamini, Tom & Jerry	Hangten Kids, Disney, Mashimaro, Barbie Style, McKids, Casarel, Yusol
2005 F/W	4		Motzmo	Levis Kids, Blue Tail, Chick

bipolarization was intensified in 2004, department stores concentrated on high-quality policies, launching high-price imported brands such as 'Burberry Children,' 'DKNY Kids,' 'Junior City,' 'Trussardi Kids' and 'CK Jean Kids'. This years as well, new brands for discount stores formed the main stream and, with increasing interest in the juniors' market, junior brands such as 'Junior City,' 'Blue Tail' and 'Levis Kids' were launched in the second half.

III. Classification by brand characteristics according to the trend of children's apparel market

One of the biggest characteristics of the children's apparel market is that buyers are different from actual users. Decisions to purchase children's clothes are made by parents but children exert significant influence on the decisions and they are not only users but also future buyers. Thus, children are future customers and give vicarious satisfaction

to their parents.

In addition, most of children's clothes showed increase in unit price and the percentage of children's apparel in the apparel market increased for three consecutive years but infants' apparel occupied the smallest part. In such a bipolarization phenomenon, competition among distribution channels are getting harder and online shopping malls in portals for children are making a good fight. Accordingly, the children's apparel market is moving toward the development of differentiated lines as well as line integration and expansion. In addition, various events, campaigns and education programs are provided as parts of service.

Thus, the present study classified current children's apparel brands according to their different marketing strategies in response to changes in consumers' lifestyle into four categories – infants' life and cultural brands, functional product brands, character brands and brands advancing to China. These brand categories were investigated closely considering the aspects of specialization, refinement and diversification, which are key factors in the change of the children's apparel market, as well as various aspects of distribution structure.

1. Infants' life and cultural brands

Despite decrease in the number of children due to the low birth rate, shopping malls for children are increasing and this suggests increasing demands for shopping spaces specialized for children and their parents. In

addition, like the partnership between Chocola and 'I.MOM' total care system,' which is an information and service business related to pregnancy, childbirth and child rearing operated for 10 years by Boryeong Group based on pharmaceutical industry, parents' preference for scientific and medically healthy brand images and, in response to the taste, we expect the expansion of children's life and cultural brands including 'fine brands for babies' and high-quality child-rearing services for mothers¹⁴⁾. Like 'Babies' House' run directly by Agabang was reopened under the new name 'Baby House,' we see the rise of 'one-stop shopping spaces' that provide every necessity for pregnant women and child-rearing and hot competition for higher services such as special consultants for shopping related to childbirth. As stores for children are getting popular like this, department stores and discount markets also set unique spaces for children, which are distinguished from existing brand stores. 'Bear Castle' with the concept of theme shopping combining a theme park and a shopping mall was opened in October 2004, and 'Okids' was opened as children's brand department store in February 2005. In addition, Lotte Department Store opened 'The Baby Care Shop' a skin care shop for infants run by Boryeong Medians at its main store and the Jamsil Branch in 2004, and its main store also opened 'Room Seven' a total shop for infants dealing with children's clothes as well as their bedding stuffs and furniture. Samsung Tesco Homeplus is selling clothes and goods for children at all of its branches and provides children's zone that integrates even playground facilities in one place.¹⁵⁾

2. Functional product brands

As the social problems of environmental pollution and the decrease of the child population are getting more serious, 'baby well-being' implies more 'care well-being' that emphasizes parents' protection of their children. This trend has brought forth functional products focused on 'infants.' Consumers appear to perceive functional products positively and not to consider the high price of functional products seriously in purchasing them.¹⁶⁾

Functional textiles under development are silver fiber, TASTEX, Crabyon fiber, soybean fiber, bamboo fiber, ginkgo fiber, corn fiber, milk fiber, organic cotton, etc. Recently Cheil Industries' 'Bean Pole Kids' announced products using organic agricultural materials¹⁷⁾, and Chocola announced items using natural soybean fiber such as newborn babies' blankets, mats and pillows and mobile dolls for baby carriages. In addition, recently, Fuzibo Korea began to import 'B.V.D' for juniors and kids and Intarsia launched 'Intarsia Kids Underwear' last year, jumping into the market of children's functional underwear. Products of 'Intarsia Kids Underwear' are differentiated from others in that they contain 'Insbio,' a new far infrared material in liquid state developed by Fuzi Spinning Company in Japan, to prevent atopic dermatitis, asthma, allergic rhinitis, etc.¹⁸⁾

Along with functional textiles, the domestic textile industry shows high interest in environment-friendly materials. Environment-friendly textiles include natural plant fibers using environment-friendly materials such as bamboo and corn, which have never been used as the materials of apparel. Recently,

small and medium textile manufacturers are supplying new items like paper fiber, organic cotton and non-colored cotton, creating new markets¹⁹⁾.

Despite depressed domestic economy, the sports and outdoor market has achieved a high growth thanks to the introduction of five-day-work-week system and the development of the leisure industry. Not just in Korea, the functional textile market is drawing attention throughout the world with the development of the sports and leisure industry. Recently, active sportswear, which has been exclusively for professional sports players, is popularized as a fashion among ordinary consumers. Accordingly, we expect a growth in demands for functional textiles.

3. Character Brand

In the recent fashion market, consumers are sensitive to fashion trend and brands are setting directions for differentiation. Children's apparel makers also intensifying their characters through expanding age targets and diversifying items. The potential for the development of character brands is high because they can make differences from other brands and accommodate various concepts and age targets through different interpretations of characters. Representative examples are 'Hello Kitty' and 'Foo' of 'Yoogyong' and 'AI Robot' of 'Seoyang Industrial'. To increase their sales, moreover, children's apparel companies adopt the strategy of enhancing familiarity to customers by introducing famous foreign characters with payment of royalties or reinforcing the utilization of their own characters. As children's subjectivity as a consumer gets

stronger than before, the use of characters may appeal to children and, consequently, affect the growth of brands.

4. Brands advancing to China

Many of domestic children's apparel brands are actively advancing to China to overcome the limitation of the local market that has reached its peak and to grow into global brands. They are exerting great efforts to get into the huge children's apparel market in China in diverse forms including direct investment, licensing and partnership.<Table 4> shows the current state of children's apparel

brands that have advanced to China. Some children's apparel brands active in attacking the Chinese market are Agabang, E-Land Kids, OURQ, etc., which opened Chinese branch offices. In particular, E-Land Kids and Agabang solidified their position in China with their items of high-quality image brands. Because the number of children's apparel makers is small compared to the large size and rapid growth of the children's apparel market in China, domestic brands advancing to China have a high possibility of success. Moreover, because most of children's apparel manufactured in China is low-priced and poor in design and quality, fine and elegant Korean brands of medium and high price are considered competitive.

<Table 4> Children's apparel brands advanced to China²⁰⁾

Brand name	Coz Coz	Agabang	Tom Kids	E-Land Kids	Hour Que
Company name	Tops Apparel	Agabang	Tomboy	E-Land World	Gloria Trading
Representative	Hwang Ju-ha, Kim Yeong-ho	Park Ung-ho	Choi Hyeong-seok	Kim Hyeon-su	Lee Eun-su
Year of launching in Korea	1991	1979	1984	-	Spring 2004
Year of launching in China	1994	1998	2002	2003	Autumn 2004
Business type	Partnership	Direct investment	Both direct investment and partnership	Direct investment	Direct investment
Target age	3~9	0~4 and parents expecting new babies	5~11	5~13	7~15
Price	Middle high	Middle high	Middle high	Middle high	Middle
Distribution network in 2005	Hong Kong, 4 stores at hotels	China: 102 stores at department stores and special stores	China: 7 stores mainly at department stores	China: 35 stores mainly at department stores	China: around 50 stores mainly at department stores

<Table 4> continue

Brand name	Ocean Sky	Premiejure	Pippi	Andre Kim Kids	Mashimaro
Company name	GSGM	EFE	Duson 21	Maju International	C Mind
Representative	Lee Jin-sun	Lim Yong-bin	Jeong Seok-myeong	Lee Jeong-woo	Choi Seung-ho
Year of launching in Korea	2002	2001	1980	2003	Spring 2005
Year of launching in China	2004	2005	2002	2005	Autumn 2005
Business type	Both direct investment and partnership	License	License	Stores under direct management	License
Target age	7~15	0~5 and parents expecting new babies	5~13	4~3	3~13
Price	Middle high	Middle high	Middle	High	Middle
Distribution network in 2005	China: 50 stores mainly at GSGM family malls	China: 20 stores mainly at department stores	Taiwan: 10 stores at department stores and 17 road shops	China: Harbin <Korea Center> First and only store	China: Aim at 150 stores at department stores and road shops

IV. Forecasts of future trends in children's apparel brands

Recently the number of children is decreasing but parents' affection for and expectation from their children are increasing and, as a result, their spending for children is also increasing. In addition, demand for high-quality and high-price products is steadily rising in the children's apparel market and this trend has intensified bipolarization between high-price products at department stores and low-price and middle-price ones at discount stores and chain stores. In such environment, what is required is not the security of distribution

networks but the specialization and diversification of distribution channels for strengthening product planning power and system. Thus, we examined the current state of changing children's apparel market from different angles and, based on the findings, forecast future trends of children's apparel brands as follows.

1. Expansion of family brands

There are increasing number of stores of

family brands that exhibit both adults' apparel and children's apparel together and gain synergy effect in their sales. Adults' apparel companies count the line of children items first in line extension because it is easy to extend their lines and advance to the market utilizing their brand values. While dress of medium-price volume casual or license concept was at the center of children's apparel launching in the past, line extension based on high-price market brands is the main stream today. This suggests that market changes are led by the creation of new revenues utilizing the asset of existing customers and increases in consumers' needs resulting from the elevated family value.

2. Brand totalization

Infants' apparel manufacturers are advancing to the toddlers' market through enlarging product size and diversifying item lines²¹⁾. This is understood that they aim to improve profitability by joining the toddler's market while reducing the weight of baby clothes and childbirth necessities in response to the decreasing birth rate. Keeping pace with such a trend, department stores are also removing zone divisions between infants, toddlers and children. Now customers' needs are sub-divided not by 'age' but by 'taste' for higher customer satisfaction and long-lasting relations. Each brand must meet customers' needs by offering sub-divided tastes of differentiated concept. For this reason, infants' apparel makers are increasing total brands, which expand their production lines to juniors'.

3. Quality price

Consumers want to purchase brands and to be respected in doing their shopping even at a discount market. Thus, even at discount stores of children's apparel, brand royalty, quality and community are important factors for the qualitative and quantitative growth of the quality price market. Thus, it is considered necessary to reinforce service such as customer management and promotive marketing through CRM.

4. Niche markets (pre-teen markets)

As the established markets fail to play their roles due to oversupply and economic recession, the children's apparel business are attacking turning their eyes to niche markets to overcome the bad business condition. A niche market is the market for pre-teens who are a new group of consumers in the apparel industry. Pre-teens refer to children at the age of around 10²²⁾. They are sensitive to fashion trend and have subjective consumption desire and substantial purchasing power but the fashion market for this class has been empty mainly because their consumption behaviors have not been understood clearly. The pre-teen market occupied 13% of the entire apparel market last year and over 60% of pre-teen customers appeared to select their clothes by themselves²³⁾. Thus it is necessary to measure the accurate body size and consumption behavior of pre-teens who go through violent changes in body and mind and to develop brands that give them a homogeneous identity.

V. Conclusions and suggestions

With economic growth and the increase of nuclear families, parents' expectation for children is getting higher and consumers tastes for fashion are being diversified in response to environmental changes such as free import. In addition, Korean apparel makers are struggling to overcome the depressed domestic market, to recover consumers' consumption, to pursue high value of sensibility and to expand the seniors' market, etc. In the current situation of the domestic apparel industry, the present study analyzed the characteristics of children's apparel brands in the 21st century. The results of the analysis are as follows and, in addition, we make a number of suggestions for improvement.

1. Children's apparel brands are evolving into family brands as well as into total brands through voluming. It is because family-centered lifestyle will be prevalent further with the introduction of the five-day-work-week system. Today, however, apparel makers are advancing to the children's apparel market with the concept of adults' apparel, overestimating their brand value. With the concept of adults' apparel, they have limitations in attracting new customers and may fail to reflect various styles, fittings and color variations required for children's apparel. It is true that barriers to the children's apparel market is low but the market has unique features distinguished from the markets for other classes of consumers. A prerequisite to the line extension of adults' apparel is that lines for children's items must reflect children's style and have strong points to

compete with other children's apparel brands. Moreover, apparel makers must develop design considering the wide range of size and the characteristics of children's apparel, strengthen sourcing abilities to create revenues, and make thorough survey of customers to find common denominators between adults' apparel and children's apparel considering that characteristic that the target class is different from the buyer class. Furthermore, they must make active investments in human resources, develop outstanding products through advanced planning and design, and support marketing techniques and management systems to stores.

2. As the declining birth rate will continue to have a negative effect on the market, it may be difficult to expand the market size but there is still a margin for growth through high-sensibility and high-quality products. The competitiveness of brands is determined by their market shares. Apparel makers should concentrate not only on stability but also on trendiness attracting the eyes of young generation's parents and strong brand images through product planning. Accordingly, concepts should be specialized according to lifestyle, customers' diverse needs should be satisfied, and cross-coordination should be achieved within a brand.

3. Considering Korean parents who do not spare investment in their children despite shrinking consumption, functional products must be high value-added goods that can enhance efficiency. However, in the current situation of the infants' apparel industry where a textile manufacturer supply its products to

multiple brands, it is difficult to develop unique products only based on materials. Thus, product planners should try to appeal to consumers not by relying on materials only but by finding methods of applying their own characters to children's dress.

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