



# the Flux Generation

Understanding the cultural influences on tweens, teens and all that falls between.

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any adult raising an adolescent can tell you it's tough to get a good read sometimes. And with nearly 54 million U.S. children ages 8 to 19, marketers targeting these lucrative consumers have the same problem: How do they attract this tween and teen demographic?

Raging hormones are enough of a challenge to navigate, but today's youth also are immersed in an intense, constantly changing, integrating and upgrading technological society. They have to keep up with a sophisticated, in-your-face pop culture, so it's no wonder today's average kid has a short attention span and, often, a volatile personality.

Global brands and national retail chains spend a lot of money to research what drives the purchase impulse in teens and tweens. And even though custom apparel decorators don't sell directly to these kids via retail, you can bet your bottom dollar that style-focused kids influence what T-shirts and uniforms are ordered by coaches and parents.

So, *Impressions* has collected some teen and tween market research for you. In the following pages, we present the low-down on teen/tween trends in a visual style your young end-users would recognize.

Here, we present some overview information, followed by details of The Market (p. 30), The Message (p. 32) and The Merchandise (p. 34).

*This information was compiled by contributing writer Danielle Cohen, and organized and presented by the Impressions staff.*

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"The printing market has shifted to more creative designs. Rather than just putting a company name in regular bold letters on a regular T-shirt, decorators are now using sublimation, discharging, crazy foil treatments and crazy embellishments. There are so many new ideas that the printing market is using and it's turning these tees into something everyone wants to wear."

— Alon Shafigi, CEO, Next Level Apparel

"Teens are really interested in discovery. I think that it is important to cater to the creativity of a young person interested in dressing 'cool,' and we offer a ton of clothing that is like nothing else on the market. Our designers are not so far away from their youth."

— Greg Selkoe, CEO, Karmaloop.com, a streetwear marketer

**tween:** (twīn) noun. A child between middle childhood and adolescence, usually between 8 and 12 years old. Neologism and marketing term to describe preadolescent. Linguistic blend of the words 'between' and 'teen.'

**tween girls:** (twīn gārlz) noun. Too old for toys, too young for boys.

## FLUX GEN?

Due to the rapid rate at which today's 8- to 18-year-olds react, adapt and move on to new technology, they've been dubbed "The Flux Gen" by GTR Consulting Corp., Sausalito, Calif., a market research firm that specializes in the teen/tween demographic. GTR issued a special Gtrend Report full of insight on these kids.

"These young adults have grown up in an environment of accelerated change where the evolution of technology has become the primary force behind popular culture," explains the 2006 report, based on a survey of 100 handpicked, trend-leading 14- to 18-year-olds. "Today's teens are more style-conscious than any other living generation. Style factor should be considered price of entry for any communication or product aimed at teens, especially as teens have become more visually 'literate.' Teens now expect more stimulation from communication to them, so in this case, seeing is believing."

"The trends I have followed have surfaced from friends and photography that I look at and music and the magazines that I'm interested in such as Vogue, Teen Vogue, Cosmo Girl and Seventeen."  
— Jordan "Ashleigh" Hausburg, 13, Ellijay, Ga.



"Teens expect 'the world' to be available at the touch of a button."

— Gtrend Report

## HARD-CORE GOES MAINSTREAM

When trucker garb went mainstream with the mesh cap rage a few years ago (think: Ashton Kutcher, Von Dutch and the frenzy that ensued), it was a natural progression for tattoo-inspired apparel and streetwear to follow suit. Especially with a little help from young Hollywood.

While streetwear typically is not associated with 'pop' celebrities or the norm, today's Tinsel Town chart-toppers have softened its edginess and brought the 'cultish' phenom to the forefront of the fashion industry. "There is definitely some crossover," says Greg Selkoe, CEO, Karmaloop.com. "The streetwear market is growing and becoming more mainstream." Case in point, Karmaloop.com's Style Salon link features images of streetwear on such teen idols as Laguna Beach, Calif.-bred sweetie Lauren Conrad from MTV's "The Hills" and superstar Katherine Heigl of "Grey's Anatomy" and "Knocked Up."

Likewise, getting inked is sharing the spotlight. Don Ed Hardy, dubbed "the grandfather of modern tattoo," has lent his name and art to designer Christian Audigier's Ed Hardy lifestyle brand, which has become a culture of street couture. (Audigier was the creative director at Von Dutch at its peak.)

"Designers such as Christian Audigier took T-shirts to the next level by creating loud, fun, vibrant designs that young Americans love," says Alon Shafigi, CEO, Next Level Apparel, Rancho Dominguez, Calif. "Prices on T-shirts are now even retailing for almost \$200 — and sometimes more. Designers give celebrities T-shirts to wear, and you will see new pictures all the time in magazines. Celebrities are spotted everywhere wearing high-couture T-shirts, and consumers, of course, are influenced by them."

In fact, rappers Lil' Wayne and T.I., hip-hop queen Fergie, teen sensations Lindsay Lohan and Britney Spears, and MTV's "The Hills" Heidi Montag and Spencer Pratt are among the young, influential famous faces celebrating the Ed Hardy brand on the company's Web site.

"Teens are becoming more creative with their online participation. Marketers can take this to heart and offer more ways for them to participate in the brand experience and share with other similarly interested teens," according to the report.

— D.C.

"The streetwear market is seeing lots of imagery of women, sneakers, a lot of abstract design and heavy prints, both screen printed and airbrushed."

— Greg Selkoe, CEO, Karmaloop.com

"Choice confers a semblance of control over their lives, affording a small degree of power over a world whose daunting complexity is fast becoming apparent to them."

— Gtrend Report

"The ubiquity of technology among teens has fused tech with fashion, prompting big-name designers such as Gucci, Christian Dior, Chanel and Karl Lagerfeld to enter the market by designing iPod accessories."

— Gtrend Report

# the Market

## DEMOGRAPHICS

### TWEENS (AGES 8 TO 12)

- 19.8 million
- Skews slightly male: 51% male, 49% female
- Racially diverse: 1 in 3 is non-white
  - White – 67%
  - Hispanic – 16%
  - African American – 13%
  - Asian – 5%

### TEENS (AGES 13 TO 19)

- 33.9 million
  - Skews slightly male: 51% male, 49% female
  - Racially diverse: 1 in 3 is non-white
    - White – 65%
    - Hispanic – 16%
    - African American – 16%
    - Asian - 1%
- Source: Alloy Media + Marketing

### Teens' projected spending for 2007: \$176 billion

— Source: "The TRU Study 2008" surveyed 1,710 teens ages 12 to 19

## WHERE TEENS LIVE

- Urban 29%
- Suburban 45%
- Rural 26%

— Source: "The TRU Study 2008" released Fall 2007 surveyed 1,710 teens ages 12 to 19

4.6 million American children ages 6 to 17 hold memberships in health clubs.

— GTrend Report

"In order to fit the image portrayed in the media, many teens have joined the fitness craze."

— GTrend Report

U.S. 10- to 19-year-old population: 42,215,186

— Source: U.S. Census Bureau, 2006 American Community Survey, updated Sept. 12, 2007

"The market is tired of seeing the regular boring 18 singles tee. It has taken a huge step forward into fashionable tees with incredible creative designs. Keychains stay in your pocket or purse. Pens are in your drawer or on desks. Calendars stay in the office. Not everyone wears hats. However, T-shirts are walking advertisements...everyone wears T-shirts."

— Alon Shafigi, CEO, Next Level Apparel

# the Message

"The combined efforts of magazines, television programs, MTV and models in teen stores have fabricated an image of what teens should be and look like. The only problem is that it's impossible for teens to live up to the expectations of this "MTVneer" ... There isn't a real teen on television. Dramas — and sitcoms — feature teens whose vocabulary, complexion, fashion sense and wise-cracking comedic timing well exceed their supposed years."

— Source: *Gtrend Report*

"Messages and products...must be wrapped in an engaging and interesting package, otherwise...teens will not see the messages being aimed at them."

— *Gtrend Report*

## TEENS FAVORITE MAGAZINES BY GENDER

### BOYS:

- *Sports Illustrated* 18%
- *Game Informer* 9%
- *ESPN The Magazine* 7%
- *TIME* 5%
- *Nintendo Power* 4%
- *Maxim* 4%
- *Popular Science* 4%
- *Game Pro* 3%
- *Vibe* 3%
- *People* 3%
- *Electronic* 3%
- *Sports Illustrated for Kids* 3%
- *PC Gamer* 3%
- *National Geographic* 3%

### GIRLS

- *Seventeen* 29%
- *CosmoGirl* 14%
- *People* 12%
- *Teen Vogue* 8%
- *Teen* 6%
- *Vogue* 6%
- *J14* 4%
- *Teen People* 4%
- *TIME* 3%
- *Vibe* 3%
- *Nickelodeon* 3%
- *Glamour* 3%
- *Us Weekly* 2%

— "The TRU Study 2008 – Spring Update"

## TOP WEB SITES VISITED

- MySpace 46%
- Facebook 24%
- YouTube 19%
- Yahoo 19%
- Google 16%
- Hotmail 8%

— "The TRU Study 2008 – Spring Update" surveyed 859 teens ages 12 to 19

"[Teens] have become active 'Ego Anglers,' seeking approval from their immediate peer group and the larger teen society made accessible by the Web. Blogs are one of teens' favorite spots to fish for compliments."

— *Gtrend Report*

"Personally, I read all of the fashion and trashy magazines so I get my fashion sense from celebrities. I rip out pictures of fashion ads or celebrities wearing really cute clothing and go through them to see what I like before I go shopping. By seeing celebrities in certain styles of clothing, I am influenced to dress like them and buy something that looks similar because I liked their style."

— Melissa Goldstein, 14, Hartsdale, N.Y.

28% of online teens blog; 35% of teen girls blog; 20% of teen boys blog.

— Pew Internet and American Life Project

# the Merchandise

The decorated apparel industry is well aware of how universal personalization has become in recent years. And in relation to the tween and teen markets, it is a critical option in helping to shape their identities. According to the Gtrend Report, "While customization has grown in popularity, it remains critical to teens that they not stand too far out from the mainstream. They may shop at the same stores, but mix and match the clothing in a different way." Zuri, a 17-year-old participant in the Gtrend Report's study indicated, "No one admits to wanting to be like someone else. It's more like, 'I am so cool because I am so unique, yet I am going to shop where unique person 89 shops, but get it in a different color.'"

Jordan "Ashleigh" Hausburg, 13, Ellijay, Ga., says she is influenced by pop culture, but likes to be unique. "Sometimes, I will use other people's [style] ideas and change them to fit me." This is a common practice in one U.S. high school where Converse sneakers are the latest trend. "Almost everyone has a pair, and they wear them with anything," says Alexandra, 16, a participant in the Gtrend Report's market research study. "Sometimes people buy them to match their outfits, and sometimes people wear colors that do not match on purpose. Some people put funky shoelaces in them so that their pair will be different than everyone else's. Also, people sometimes draw on them or have people sign them." ▲

## CHAIN CLOTHING STORES SHOPPED IN PAST 12 MONTHS

- Old Navy 35%
- American Eagle 29%
- Aeropostale 23%
- Hollister 20%
- Gap 19%
- Abercrombie and Fitch 19%
- Victoria's Secret 18%
- Hot Topic 16%
- Forever 21 15%
- PacSun 14%

— "The TRU Study 2008 – Spring Update" surveyed 859 teens ages 12 to 19

## AFFORDABLE

Teens are interested in getting the best deal. Their disposable income is limited and, in this economy, becoming more limited. They look online, go to multiple stores, etc. Retailers must make it easy for them to find the bargain. — Gary Rudman, President, GTR Consulting



NATALIE AND MATT RUDISILL, owners, Appalachian Imprints, Morganton, N.C., embroidered the name of a 13-year-old from their town onto a pair of hot pink high-top 'Cons.

93% of teens use the Internet; 55% of online teens have profiles.

— Pew Internet and American Life Project, a non-partisan, non-profit research center that examines the social impact of the Internet

## SPENDING POWER

### TWEENS:

- Forecasted to influence \$150 billion of parents' money in 2007
- Will spend up to \$51 billion annually of their own money

### TEENS

- Will spend up to \$179 billion of their own money
- Alloy Media and Marketing