

A STUDY OF THE PRESENT STATUS
OF THE DALLAS
WOMEN'S APPAREL MARKET

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ABSTRACT

A STUDY OF THE PRESENT STATUS OF THE DALLAS WOMEN'S APPAREL MARKET

by Jeanne Marie Golly

Representing an initial effort toward analysis of the regional markets of the national apparel industry, this is a descriptive study of the present status of the Dallas Women's Apparel Market. A selected group of representatives active in the Dallas Market was chosen to respond to four structured interview schedules designed to reveal factual information concerning: first, the development and general organization of the Dallas Women's Apparel Market, and second, such aspects as the structure and operation of manufacturing firms, types of apparel produced, the presentation and distribution of Dallas-manufactured apparel, promotional activities, and the extent of the market. Opinions and viewpoints relative to future developments, expansion, and foreseeable changes in the market were also solicited from the respondents.

Manufacturers, designers, retailers, promotional directors, and educators indicated that the contribution of the Dallas Market to the national apparel industry lies mainly in the designing and manufacturing of distinctive, fashionable, medium-priced apparel well-suited

to the Southwestern way of life. Members of the sample consider Dallas the third largest fashion market in the nation, important more for its production of fashion apparel with the distinctive "Dallas-Look" than for its volume of production or innovation of fashion trends.

Manufacturing firms in Dallas presently utilize the "inside-shop" method of production, own one or two subsidiary plants, and employ between one and two hundred workers relatively free from unionization.

Designers derive inspiration and ideas for adaptation from a variety of sources and create designs by sketching, pattern-making, and draping fabrics.

Dallas firms currently produce a predominance of one-piece and two-piece dresses and two-piece and three-piece suits; manufacturers are producing as much dressy and evening and holiday apparel as casual sportswear and streetwear. Dallas designers and manufacturers participate in four seasonal markets and their own Transitional market.

Frequent and early scheduling of market showings, specialized facilities of two apparel marts, and extensive use of advertising and promotional media characterize the Dallas Market. Specialty shops are the primary retail outlets, but department and chain stores also serve as distributors of Dallas apparel. The wide geographic extent of the Dallas Market has given it important national as well as regional stature.

The culture, way of life, and climate of the Southwestern area, and general fashion trends have been identified as important factors which influence designs coming out of the Dallas Market. In the opinion of the representatives questioned, Dallas is unique in its production of apparel with a distinctive use of color and fabric, styling, and silhouette: the "Dallas-Look."

Predictions for the future of the Dallas Market include upgrading apparel through styling, pricing, workmanship, and fabrics. An increasing number of firms are expected to enter the market as present firms expand and new firms take advantage of the relatively union-free labor force. Dallas manufacturers and designers predict the development of a stronger regional market with a growth potential described as "limitless."

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by

Jeanne Marie Golly

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CHAPTER I

INTRODUCTION

Statement of the Problem

Dallas, Texas,--an energetic, prosperous, modern city, possessing a citizenry more cosmopolitan than that of most other Texas communities--has been acclaimed the "fashion center of the Southwest."¹ Dallas has experienced rapid expansion as a production and distribution center of women's apparel in the United States. Dallas manufacturers realized the success of their market, from its beginning in 1914, is dependent upon their ability to design and manufacture clothes in harmony with the needs, surroundings, activities, and personalities of people in the Southwest.² Awareness of these factors on the part of the manufacturers has made the Dallas Market a dynamic, multimillion dollar industry creating,

¹Workers of the Writer's Program of the Work Projects Administration in the State of Texas. Texas: A Guide to the Lone Star State. (New York: Hastings House, 1949), p. 231.

²Joseph Scheines (ed.), Apparel Engineering and Needles Trades Handbook (New York: Kogos International Corporation, 1960), p. 3.

manufacturing, and distributing Texas fashions to consumers all over the world.³ Dallas ranked among the twelve leading women's apparel markets since 1939.⁴ A strong nucleus of fashion apparel manufacturers in Dallas is now recognized as contributing to the development of one of the three most important market centers in the country.⁵

The concern of this study is to present a description of the contemporary Dallas Women's Apparel Market with reference to such aspects as the structure and organization of firms, types of lines designed and manufactured, distribution and promotional activities, the geographical extent, and the significance of the Dallas Market.

Review of the Literature

Comparatively little research attention has been given to women's apparel markets in the garment industry of the United States. An early investigation completed

³Tira W. Griffin, "A Survey of Selected Regional Apparel Markets Producing Women's and Misses' Apparel" (Unpublished Master's thesis, Michigan State University, 1949), p. 3.

⁴Margaret Adams, "Public Relations Activities as a Contributing Factor to the Growth and Development of the Dallas Fashion Market " (Unpublished Master's thesis, Department of Home Economics, The University of Texas, 1958), p. 1.

⁵Dallas Chamber of Commerce, Dallas, Vol. 44, No. 2 (April, 1965), p. 19.

by Griffin comprised a broad treatment of selected regional markets producing women's and misses' apparel. The Griffin survey included many garment-producing centers; each was handled in a general manner because of the number involved.⁶

Other authors have intensively examined individual market centers. Hall based his study on women's apparel production in the New York Metropolitan Region. Noting a decline in the New York market, Hall attempted to identify the major forces tending to lessen the dominance of this market center.⁷ The apparel manufacturing and marketing facilities established in California were summarized by Charles S. Goodman. Goodman speculated about factors which have brought about the development of new market centers which attract buyers on a nation-wide basis, yet are remote from the existing wholesale market.⁸ In the rapidly developing Florida economy, the role of the women's apparel manufacturing industry has become a topic of increasing significance, especially since the industry may be able to profit by associating with Florida's reputation as a fashionable resort area.

⁶Griffin, op. cit., p. 1.

⁷Max Hall (ed.), Made in New York (Cambridge, Mass.: Harvard University Press, 1959), p. 4.

⁸Charles S. Goodman, "The Location of Fashion Industries with Special Reference to the California Apparel Market," Michigan Business Studies, Vol. X, No. 2 (Ann Arbor, Michigan: University of Michigan Press, 1959), p. 1.

The women's apparel industry in Florida was examined by Hersker, who sought to describe its nature and to determine the most profitable course for its future development.⁹ A recent investigation by Bourne analyzed the development of the fashion apparel industry in Alabama.¹⁰ Research completed by Schuler¹¹ and Rust¹² illustrated the significant role apparel production plays in the yearly total manufacturing output in the State of Texas. Johnson, in describing the women's outerwear industry in Texas, traced the decline of New York as a production center in the women's apparel industry, the rise of regional production centers, and the development of Dallas as a prominent regional women's apparel market.¹³

Lowell R. Gano underscored the outstanding position the Dallas Women's Apparel Market has commanded during the last two decades when he described the national and

⁹Barry Jay Hersker, "The Women's Apparel Manufacturing Industry in Florida" (Unpublished Doctoral dissertation, The University of Florida, 1962).

¹⁰Judith Mayton Bourne, "An Analysis of the Development of the Fashion Industry in Alabama, 1949-1962" (Unpublished Master's thesis, Auburn University, Auburn, Alabama, 1962), p. 1.

¹¹Anne K. Schuler, "Work Clothing in Texas," Texas Business Review, Vol. 29, No. 5 (May 1955).

¹²Joe Carroll Rust, "The Texas Apparel Industry," Texas Business Review, Vol. 34, No. 1 (January 1960).

¹³Elton Davis Johnson, "Women's Outerwear Industry in Texas" (Unpublished Doctoral dissertation, The University of Texas, Austin, 1954), p. 34.

international character of the market in 1947.¹⁴ Another study conducted by Adams investigated public relations activities as a contributing factor to the growth and development of the Dallas fashion market.¹⁵

Summary

Few studies of women's apparel markets in the United States have been made. However, writers such as Hall, Griffin, Goodman, Hersken, and Bourne, as well as Adams, Johnson, and Gano agree that regional women's apparel markets are a significant part of the garment industry in the United States.

The production and distribution of women's apparel in Dallas is an important factor in the national retail market's total annual sales of \$1.9 billion.¹⁶

¹⁴Lowell R. Gano, "The Women's and Misses' Apparel Industry in Dallas, Texas" (Unpublished Master's thesis, Southern Methodist University, Dallas, 1949), p. 87.

¹⁵Adams, op. cit., p. 16.

¹⁶Dallas Chamber of Commerce, op. cit., p. 18.

CHAPTER II

METHODOLOGY

Selection of the Method

Several data procurement devices used by researchers in similar studies were analyzed. After careful study, the direct interview technique was chosen for this survey. According to Selltitz, the direct interview (technique) offers a better opportunity for the interviewer to maintain complete control of the content areas of the interview by setting up the framework and redirecting the interviewee's responses to keep them within the desired structure.¹ Surveys conducted by personal interviews have an additional advantage over surveys conducted by mailed questionnaires in that complicated questionnaires requiring extended written responses are appropriate only for subjects with a considerable amount of education. Selltitz further stated that the interview is the more appropriate technique for revealing information about complex, emotionally-laden subjects or for probing the sentiments which may underlie an expressed opinion.²

¹Claire Selltitz, Marie Jahoda, Morton Deutsch, and Stuart W. Cook, Research Methods in Social Relations (New York: Holt, Rinehart and Winston, 1963), p. 242.

²Ibid.

Development of the Instrument

In developing the instrument, consideration was given to the utilization of fixed-alternative questions where the responses of the subject were limited to stated alternatives. The use of this type of question was abandoned, however, in favor of open-end questions which were designed to permit a free response from the subject rather than one limited to stated alternatives. As Selltiz pointed out, the distinguishing characteristic of open-end questions is that they merely raise an issue but do not provide or suggest any structure for the respondent's reply; the respondent is given the opportunity to answer in his own terms and in his own frame of reference.³

Four structured interview schedules were developed for this study; each schedule contained specific questions for manufacturers, designers, retailers, promotional directors, and educators, as well as general questions for comparison purposes. In the development of the instrument, a number of colleagues were informally interviewed to determine whether or not the interpretation of the questions by the respondents was the same as that which was intended by the researcher. The completed interview schedules which are included in Appendix A were modified several times in order to convey the intended interpretation.

³Ibid., p. 257.

The Pretest

The purposes of the pretest were to provide a base of experience for the researcher, to test the interview technique for effectiveness, to test the interpretations the respondents might have of the various questions, and to see whether or not the length of the interview was within the attention span of the respondents. The interview schedules were pretested by administering them to two retailers, a designer-manufacturer, and an advertising specialist in East Lansing, Michigan. As a result of the pretest, minor changes were made in the instrument in order to allow for the approximate length of time necessary for answering the questions. The instrument for data collection and the interview technique were judged to be quite satisfactory for the research requirements.

Reliability and Validity

The reliability of any test refers to and depends upon the extent to which repeated administrations to the sample population will yield the same results. The reliability of the instrument was not determined; the main disadvantages to a test of reliability were imposed by the elements of time and distance.

The validity of an instrument or test refers to and depends upon "the degree to which a measurement

procedure measures what it purports to measure.⁴ As a result of the pretest, it was assumed that the test was valid.

Selection and Description of the Sample

The sample for the study was drawn from Dallas, the second largest metropolitan area of Texas.⁵ Dallas leads the Southwest and ranks high nationally in wholesale and retail trade, banking, insurance, and per capita income.⁶ The city's population in 1960 was 679,684 inhabitants.⁷

A selected group, 39 adults who are active in the Dallas Women's Apparel Market, was chosen by purposive sampling technique to participate in this study. According to Selltitz, the basic assumption behind purposive sampling is that with good judgment and an appropriate strategy one can hand-pick the cases to be included in the sample and thus develop samples which are satisfactory in relation to one's needs.⁸ The researcher interviewed 16 manufacturers, 11 designers, two retailers, six promotional directors, and four educators. Part I of the

⁴Marie Jahoda, Morton Deutsch, and Stuart W. Cook, Research Methods in Social Relations (New York: The Dryden Press, 1951), p. 109.

⁵Elton M. Scott, Texas Today (Norman, Okla.: Harlow Publishing Corporation, 1963), p. 209.

⁶Ibid., p. 210.

⁷United States Bureau of the Census, Eighteenth Census of the United States: 1960. Population, Vol. 1.

⁸Selltiz, op. cit., p. 520.

interview schedule was administered to the entire group. Part II was used as a basis for interviews with manufacturers. Parts III, IV, and V were administered to designers, retailers, and promotional directors, respectively.

Method of Analysis

For the purposes of this study, the process of analysis included coding the interview replies and tabulating the data. Such an analysis provided the basis for a description of the present state of the Dallas Market.

Definition of Terms

To achieve a better understanding of the Dallas Women's Apparel Market, the investigator defined selected terms used in the study.

The term apparel refers to clothing and other manufactured articles produced for women and misses. The apparel industry includes the group of firms concerned with factory made outerwear manufactured from textile fabrics and materials.⁹

In the apparel industry, style refers to the silhouette, fabric, color, decoration, trim, or accessories

⁹U.S. Bureau of the Census. 1963 Census of Manufacturers. Preliminary Report, Area Series: Texas.

used at a particular time, identified with a particular group of people.¹⁰ In the widest meaning of the term, style extends to every phase of life.¹¹ In this study style is used in its broader scope as well as in terms of the narrower definition applied to apparel.

Many definitions of fashion have been formulated in accordance with needs of interpretation and usage. One inclusive definition might be stated:

Fashion is the characteristic expression or taste in clothing which is accepted and shared by the majority of people at a particular time and is subject to ceaseless change within the bounds of custom over a period of time. ¹²

The term fashion merchandise refers specifically to women's outer apparel such as coats, suits, dresses, shoes, millinery. The term applies with particular emphasis to merchandise in which the fashion element is a predominate characteristic and in which change is so rapid that it is imperative to keep up with these fashion changes.¹³

¹⁰Bernice G. Chambers, Fashion Fundamentals (New York: Prentice Hall, Inc., 1947), p. 1.

¹¹Helen E. Meicklejohn, "Dresses--The Impact of Fashion on a Business," in Walton Hamilton, Price and Policies (New York and London: McGraw-Hill Book Co., Inc., 1938), p. 304.

¹²Elinor Roth Nugent, "The Relationship of Fashion in Women's Dress to Selected Aspects of Social Change from 1850-1950" (Unpublished Doctoral dissertation; Louisiana State University and Agricultural and Mechanical College, Baton Rouge, 1962), p. 17.

¹³Goodman, op. cit., p. 5.

Market refers to the manufacturers in each category of apparel;¹⁴ regional market refers to the apparel manufacturers in a particular geographic region. Southwest refers to the area of the United States which includes the states of Arizona, New Mexico, Oklahoma, and Texas.

As a result of the separation of functions in the garment industry, three types of employers must be delineated. A manufacturer operates an "inside-shop" type of production; that is, in addition to buying fabric and selling the finished garments, he runs his own production plant in which his workers cut and sew the fabric into apparel.¹⁵ A jobber buys the fabric, designs, and sells the garments; he does not actually manufacture apparel.¹⁶ The jobber has a showroom and a cutting room, but sends fabric to "outside-shops" to be sewed into apparel. The man who runs the "outside-shop" is the contractor.¹⁷ He

¹⁴Mary B. Picken, The Fashion Dictionary (New York: Funk and Wagnalls Co., 1957), p. 220.

¹⁵Hall, op. cit., p. 26.

¹⁶Ibid.

¹⁷Ibid.

is charged with the responsibility of hiring production workers and sewing the fabric into garments. He manufactures to specification, never takes title to the goods, and is in no way involved with the marketing of apparel. In some cases, however, what is ostensibly an independent contractor shop is in reality a subsidiary, owned by a jobber or manufacturer.¹⁸

Importance of the Study

There is reason to believe that, because of the lack of studies on regional women's apparel markets, there is a need for investigations of this type. Griffin concluded as a result of her exploration of a number of regional women's apparel markets that "a more detailed study of a single market would have resulted in a report of greater value. . . ."¹⁹ Griffin also suggested that an intensive examination of an individual market would be of importance to education, business, and industry. Because of the growing prominence of the Dallas Market, an analysis of the status of the production of women's apparel in Dallas should make a significant contribution to a body of knowledge of regional women's apparel

¹⁸Ibid.

¹⁹Griffin, op. cit., p. 31.

markets. The research also may serve as a basis from which other studies may be patterned, leading to comparative studies of regional markets.

CHAPTER III

HISTORICAL GROWTH AND DEVELOPMENT OF THE DALLAS MARKET

Dallas was first settled in 1841 at a ford across the Trinity River.¹ With the completion of two railroads, the availability of transportation made the city the most important distribution center of Texas. Dallas was the concentration point for materials shipped south or east, and the outfitting point for passengers going west. The railroads also brought increased traffic in buffalo hides and leather goods, and an influx of cotton buyers into the city.² Discoveries of oil in the great East Texas field stimulated further development. By 1896, the wholesale and jobbing business of the city totaled \$30,000,000.³ Dallas had become a vast warehouse from which hundreds of "drummers" set forth to cover the market.

Historical literature cites the passing of a city ordinance in 1875 as having laid the groundwork for the

¹Elton M. Scott, Texas Today (Norman, Okla.: Harlow Publishing Corporation, 1963), p. 209.

²Texas Fashion Creators, "From Wagon Trains to Evening Trains Dallas Came Up to Third in Fashion" (December 1, 1962), p. 1.

³Ibid., p. 2.

manufacture of apparel in later years.⁴ This ordinance exempted from taxation all manufacturing plants established within twelve months, having machinery not costing less than \$10,000, and employing as many as 30 hands.

The first ready-to-wear jobbing house in Texas was established in 1907 by the late August Lorch, founder of the present-day Lorch-Westway Corporation. This "one-horse peddler," as he billed himself, promoted such items as "double-breasted bearskin coats with fancy frogs and available in all colors."⁵ It was reported in 1909 that 400 buyers had registered at the Spring Merchants Meeting in Dallas.⁶ In that same year one manufacturer of work clothing exceeded the \$1,000,000 mark in volume of sales.⁷

By the time the wholesale house of Higginbotham-Bailey-Logan (now Higginbotham-Bailey) was founded in 1914, Dallas had become "the business center of the Southwest."⁸ The city continued to grow as an apparel manufacturing-distributing center, although little apparel

⁴"History of Dallas Apparel Market," Dallas, Vol. 44, No. 4 (Dallas: Dallas Chamber of Commerce, April, 1965), p. 30.

⁵Ibid.

⁶Texas Fashion Creators, op. cit., p. 2.

⁷Ibid.

⁸Ibid., p. 3.

was actually manufactured before the 1920's. The firm of Higginbotham-Bailey-Logan began manufacturing men's work clothing in 1919; the continued growth of the industry prompted this same firm to begin designing and manufacturing "wash dresses" in 1921.⁹

On Thanksgiving Day, 1925, Lester Lief and partner, E. G. Wadel, moved their two-year old Marcy Lee Manufacturing Company from Tyler to Dallas.¹⁰ This firm, which has grown into one of the largest dress manufacturing companies in the South, is often cited as a symbol of the excellent working conditions which have contributed in no small measure to the success of Dallas as a fashion market.

The enterprising August Lorch began manufacturing dresses in 1927 in an effort to help alleviate the difficulties local buyers were having with eastern manufacturers who were duplicating "confined lines" to sell to other jobbing houses.¹¹ Lorch's first dresses were lavishly trimmed housedresses similar to the type other

⁹"History of Dallas Apparel Market," op. cit.

¹⁰Texas Fashion Creators, op. cit., p. 3.

¹¹Ibid., p. 4.

pioneers in the area were producing. Asbury Millinery began wholesale distribution of millinery in 1929; this was the first entry of accessories into the market picture.¹² By 1929 there were 13 manufacturers of women's outerwear in Dallas.¹³

The first style show for retail buyers was staged by the Style Show Association, an organization composed of apparel manufacturers and jobbers in the Dallas area. The show was financed by the members of the association, and was held in the old Opera House at Main and St. Paul streets. By 1929 this group was utilizing Fair Park Auditorium for its market shows.¹⁴

The Roaring Twenties proved to be a golden era for Dallas as industry, finance, and trade flourished; however, the apparel industry did not expand noticeably until the mid-thirties. Newcomers such as the Green Brothers, Nardis of Dallas, Kohen-Ligon-Folz, and Donovan Manufacturing Company (now Donovan-Galvani) joined the apparel manufacturing group at that time.¹⁵

¹²Ibid.

¹³Margaret Adams, "Public Relations Activities as a Contributing Factor to the Growth and Development of the Dallas Fashion Market" (Unpublished Master's thesis, Department of Home Economics, The University of Texas, 1959), p. 3.

¹⁴Texas Fashion Creators, op. cit., p. 3.

¹⁵Ibid.

Frank H. Kidd wrote in 1931:

Dallas has become the established market place of the Southwest. The advantages that made Dallas a great market place in the past are still here and are continuing to build the market in even greater proportion. These are a natural centrally located position, easily accessible without waste of time or money, to the entire area of four states; low freight rates as compared with those from markets of the north and east, overnight delivery to almost any point in the territory; a complete market, providing all the items necessary for the retailer to stock his entire store, from threshing machines to thread, fur coats to fancy notions.¹⁶

E. F. Anderson reported in 1936 that the Dallas Market was exceeding the boundaries of the Southwest:

Growth of the Dallas market plus unusual interest in the Centennial Exposition have brought inquiries indicating that the market has extended its borders beyond the Southwest. Every firm in the market has developed its plans for the season in keeping with the unparalleled interest evidenced from points as distant as Wyoming and New Jersey. ¹⁷

With the approach of the Texas Centennial Exposition in 1936, manufacturers' representatives were asked to relinquish their hotel room exhibits during the exposition because it was feared that Dallas hotels would be overtaxed. The salesmen moved their displays to Fort Worth hotels. Buyers were forced to visit manufacturers' and wholesalers' showrooms in Dallas, and then travel to Fort Worth to see

¹⁶ Frank H. Kidd, "The Fall Market," Dallas (June, 1931), p. 5.

¹⁷ E. F. Anderson, "Record Attendance Expected at Fall Market," Southwest Business (August 1936), p. 9.

the hotel sample rooms. This split market, although not satisfactory, continued until the early 1950's. The women's and children's apparel market was then returned to Dallas.

Many unsatisfactory labor conditions in concentrated industrial areas throughout the United States caused small garment-makers to seek refuge in the Dallas area. By 1939 there were 26 manufacturers of women's outerwear in the city,¹⁸ and the industry had an annual sales volume of \$18,000,000.¹⁹

Although "wash dresses" were in great favor during the twenties and thirties, Dallas manufacturers had already recognized the importance of the fashion element to the sale of their goods:

Today the wash dress is in the best of society as far as fashion is concerned. Dallas manufacturers of wash dresses were particularly alert during the decade past. Other cities were manufacturing wash dresses in great volume. If Dallas was to compete with the more distant manufacturer outside of Dallas' own territory, it had to be on a basis of fashion.²⁰

Designers were translating Southern cotton fabric into the sportswear that was soon to become the signature of Dallas-made fashions.

¹⁸Adams, op. cit.

¹⁹Texas Fashion Creators, op. cit., p. 4.

²⁰"Fashionably Speaking," Southwest Business (January 1937), p. 5.

That the climate of the Southwest demands different weight fabrics than are used in other parts of the nation was undeniable from the beginning of the markets' history. An article from Southwest Business made this observation in 1937:

The Southwest's 12,000,000 citizens have a different mode of living from their Northern, Eastern, Old South or Pacific Coast cousins. The climate induces a greater degree of outdoor living than most regions enjoy; the habits and occupations of the people are different; their tastes are rooted in a newer, bolder, freer, tradition than the older sections of the country.²¹

The Dallas women's apparel industry rapidly expanded with the coming of World War II. Retail buyers from all over the United States brought increased national recognition to Dallas manufacturers. During the 1940's these buyers grew more and more dependent upon Dallas as their market for fresh, originally-styled fashions.

The Dallas Fashion and Sportswear Center was founded in June of 1942 by Lester Lorch, president of Lorch Manufacturing Company and son of the founder.²² This new organization was formulated within the Manufacturers' and Wholesalers' Association of the Dallas Chamber of Commerce. The Center's first style show was

²¹Ibid.

²²Texas Fashion Creators, op. cit., p. 5.

presented during market week at the Columbian Club on July 21st, 1942.²³ At this time the group launched a national publicity campaign designed to promote Dallas fashions in every major city of the United States.

In November of 1944, again under the leadership of Lester Lorch, the Dallas Fashion and Sportswear Center established a School of Design at Southern Methodist University in Dallas. The Center financed the program for the first class and provided scholarships for 14 students; the scholarship arrangement was continued over a period of years. Administrators at the University were pleased with the accomplishments of this new department and took over the financial responsibilities of the School of Design in July of 1949.²⁴

The Dallas Fashion and Sportswear Center engaged a full-time secretary-manager in 1947.²⁵ Plans also were made for the Center to operate outside the framework of the Chamber of Commerce.

In 1946, the volume of sales in Dallas amounted to 1.2 percent of the national total, and Dallas was eighth

²³Ibid.

²⁴Ibid., p. 6.

²⁵Ibid.

in national rank.²⁶ There were 46 manufacturers of women's apparel in Dallas by 1946. Graydon Heartsill of the Dallas Times Herald wrote:

The fact is that in 5,000 towns and cities of the forty-eight states and five foreign countries more than \$160,000,000 is spent annually in 25,000 retail stores for clothing bedecked with made-in Dallas labels.²⁷

The Market Planning Service, a division of the National Credit Office, reported four nationally advertised brands of women's outerwear manufactured in Dallas in 1946.²⁸ An investigation by Gano was summarized:

In December, 1947, 6 manufacturers were selling in 40 or more states, 7 in 30-39 states, 3 in 20-29 states, 1 in 10-19 states, 3 in 1-9 states, and 10 had export accounts.²⁹

By 1950, the Dallas women's apparel industry was producing a sales volume of \$60 million, providing jobs for 10,000 people, and purchasing 60,000,000 yards of fabric annually.³⁰ The June 3, 1950, issue of Business Week magazine toasted the Dallas Market as a major fashion market in these words:

²⁶ Adams, op. cit., p. 3.

²⁷ Graydon Heartsill, "Dallas Apparel Manufacturing History," reprinted from The Daily Times Herald (Dallas, Texas), August 28, 1949.

²⁸ Market Planning Service, The Dress Industry (New York: National Credit Office, Inc., 1948), p. 35.

²⁹ Gano, op. cit., p. 87.

³⁰ Texas Fashion Creators, op. cit., p. 7.

Fashion is in the air in Dallas. Something of the Texas way of living, and the color and frankness of the West, gives Dallas styles a fresh note. The Dallas stores are noted for fashion zeal. Dallas women are known for their grooming and clothes consciousness. This communicates itself to the manufacturing groups. . . . With wartime impetus, local fashion flair, and longtime role as Southwest regional distributing hub, Dallas has witnessed amazing growth of the garment industry.³¹

In 1951, 1.5 percent of the national sales were completed in Dallas.³² In that same year, fashion editors from all over America were invited to attend Dallas' first annual Press Week. From its inception, Press Week news stories of Dallas fashions have created increasing awareness of the flourishing fashion industry in Dallas. To augment publicity efforts, semi-annual press previews were launched before the May and October market showings for local and regional fashion editors so that news stories for Dallas lines would be concentrated during market periods. The success of the Press Week showings is illustrated by a 1951 news release of the Holiday market which noted buyers from 13 states in attendance.³³ A 1955 account of the Fall market noted the participation of buyers from 24 states.³⁴

³¹Business Week (June 3, 1950), p. 19.

³²Adams, op. cit., p. 3.

³³"Buyers From Thirteen States Attend Holiday Market," Dallas (Dallas: Dallas Chamber of Commerce, September, 1951), p. 65.

³⁴"Buyers From Twenty-four States Attend Fall Market," Dallas (Dallas: Dallas Chamber of Commerce, June, 1955), p. 20.

In 1955, 1.7 percent of the national sales were made in Dallas, representing a rank of sixth place both in volume of sales and in number of factories.³⁵ The Market Planning Service reported that in 1955 Dallas had 66 factories and an annual sales volume of \$48,292,000.³⁶ In 27 years, the number of firms had increased by 53, an increase of more than 400 percent.

The Dallas Fashion and Sportswear Center changed its name in 1958 to The Dallas Fashion Manufacturers Association.³⁷ At this time the Association purchased and began publishing the Dallas Fashion and Sportswear magazine. The circulation of the magazine reached more than 7500 within a year's time, and the magazine was soon reaching every major store in every major city in the United States.³⁸

Adams, in an investigation completed in 1958, cited the following factors as contributory to the development of Dallas as a fashion market center:

³⁵ Adams, op. cit., p. 1.

³⁶ Ibid., p. 3.

³⁷ Texas Fashion Creators, op. cit., p. 7.

³⁸ Ibid.

1. Demand for a larger wardrobe by American women as the result of cultural changes.
2. Demand for more fashionable clothing by American women.
3. Acceptance of the cotton dress as a fashionable garment.
4. Depression buying habits.
5. Increased middle income market, and its demand for medium-priced clothing.
6. World War II buying habits.
7. Changes in clothing preference as a result of World War II and the Hollywood influence.
8. The climate of the Southwest.
9. The wealth of Texas.
10. The transportation facilities to and from Dallas.
11. The complete market facilities of Dallas.
12. The retail stores of Dallas which comprise comparative shopping facilities for retail buyers. 39

Adams concluded that the public relations activities in the Dallas Market were a major contributing factor to its growth and development.⁴⁰ According to a report on the Arts in Dallas, the artistic and cultural achievements of the City of Dallas have greatly supported the growth of the apparel industry there.⁴¹

The name of the Dallas Fashion Manufacturers Association was changed to The Texas Fashion Creators Association in 1961 to accommodate its members from out of Dallas.⁴² This change of policy brought the Association's membership up to 44 firms.⁴³ The magazine of the association was renamed Texas Fashions.

³⁹Adams, op. cit., p. 15-16.

⁴⁰Ibid., p. 72.

⁴¹"A Report on the Arts in Dallas," Dallas, Vol. 44, No. 4, op. cit., p. 44.

⁴²Texas Fashion Creators, op. cit., p. 8.

⁴³Ibid.

Many nationwide promotional events for the Dallas manufacturers were scheduled during 1962. The Texas Fashion Creators Association staged special "Fashion Fair" showings in Dallas and New York for store executives. The association also participated in "Salutes to Texas Fashions," presented by national retail stores.⁴⁴ The Today show of NBC television featured Dallas-manufactured apparel as it presented the Texas fashion story to listeners from coast-to-coast.⁴⁵ E. I. du Pont de Nemours and Company elected to feature Dallas-manufactured fashions at an evening celebration for 3000 retailers in October of 1962. For this event, 89 garments utilizing du Pont fibers were selected as the basis for a colorful, imaginatively presented musical fashion show entitled, "The Sound of Texas Fashions."⁴⁶

More recently, textile mills such as Reeves Brothers, Cohn-Hall-Marx, and Spring Mills have staged special national promotions using Dallas fashions.⁴⁷

The women's apparel industry in Dallas has continued to grow steadily. The industry currently supports the

⁴⁴Ibid., p. 9.

⁴⁵Ibid.

⁴⁶Ibid.

⁴⁷Ibid., p. 10.

fifth largest number of employees in the Dallas vicinity; of the industry's 12,000 total employees, 9500 are women.⁴⁸ The Dallas industry has a payroll in excess of \$37 million.⁴⁹ The Texas Fashion Creators Association currently has a membership of 48 firms.⁵⁰

Summary

The early women's apparel industry in Dallas, dating from 1914, was established primarily for the consumption of Southwesterners. The apparel industry kept pace with growth elsewhere, however, and by 1936 the market had exceeded the boundaries of the Southwest. During the late 1930's the Dallas Market had begun to attract outside buyers.

In the early years of the market, manufacturers produced wash dresses almost exclusively. By the mid-thirties, Dallas manufacturers turned their emphasis to the production of casual sportswear, separates, and one-piece dresses. These form the basis of the present industry.

Since the early forties, and continuing until the present, Dallas women's apparel production, as measured by employment, payrolls, and sales, has increased rapidly. Dallas women's apparel manufacturers have become

⁴⁸Ibid.

⁴⁹Ibid.

⁵⁰Dallas Chamber of Commerce, op. cit., Vol. 44, No. 4, p. 13.

sufficiently important to attract national buyers in increasing numbers.

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CHAPTER IV

THE MANUFACTURING FIRMS IN DALLAS

A study of the Dallas Women's Apparel Market involves an intensive examination of the manufacturers in the area. For purposes of clarification, the information presented in this chapter will be separated into two parts: the structure and organization of the manufacturing firms, and the designers in the manufacturing firms.

Included in the section on the structure of the firms are considerations of the establishment of the firms; ownership and financing; production and operations; and sources of materials, labor, and design talent.

The information pertaining to the designers in the manufacturing firms includes the experience, employment, and educational background of the designers; sources of design creations; and the structure and organization of design departments within the manufacturing firms.

Structure and Organization of the Manufacturing Firms

Establishment of firms

The 16 manufacturing firms participating in the study were asked for background information on the establishment of their firms. Compilation of data in Table 1 shows that although the number of firms

established has increased steadily, the period of greatest growth was from 1950 to 1959.

Table 1. Periods of firm establishment

Years	Firms Na
1900-1909	1
1910-1919	0
1920-1929	1
1930-1939	1
1940-1949	2
1950-1959	7
1960-1969	2
Total	14

^aTwo firms did not answer.

Each of the 16 manufacturers interviewed reported their firms were established as manufacturing operations and have continued to operate as manufacturing plants.

Ownership and financing

A question on page 12 of Appendix A regarding ownership of firms revealed the following: one firm under individual ownership; three firms under partnerships; 11 firms, over two-thirds of the sample, as closed corporations.

The nature of apparel manufacturing necessitates financial backing from various sources. Further questioning of Dallas manufacturers revealed that of the available methods of financing their operations, five of the manufacturers rely upon commercial banks. Two of the manufacturers rely upon factoring companies. Ten of the manufacturers, almost two-thirds of the sample, preferred not to answer this question.

Production and operation

Additional research explored the production of apparel in Dallas. A firm-by-firm analysis of the sample indicated all firms in the sample employ "inside-shop" manufacturing. Nine firms engage contractors upon occasion.

The number of production plants run by each of the firms is a distinguishing factor in operations. Six firms operate single production plants, and nine firms operate multiple units. Of these nine, four firms operate two production plants each, and three firms operate three production plants each. One of the largest firms in the sample operates four production plants, and another firm operates a total of six plants. One manufacturer did not indicate the number of plants his firm controlled.

On detailed examination of the location of production plants, supplementary information revealed only

one of the nine firms reporting multiple production plants operates subsidiary plants located in the City of Dallas. The remaining eight firms operate subsidiary plants located in small towns near Dallas. These towns include: Buie, Cleburn, Decatur, Gainesville, Greenville, Henderson, Hubbard, Kilgore, Mesquite, Mexia, Mt. Pleasant, Stephenville, West, Whitewright, and Wolfe City.

The number of manufacturing employees per establishment is a guide to the size of the firm. Table 2 shows five firms within the 100-199 category of numbers of manufacturing employees and three of the largest firms in the Dallas market reported the number of their employees in the category of 400-499 manufacturing employees.

Table 2. Number of production employees by firms

Production Employees N	Firms N ^a
20- 24	1
50- 74	2
100-199	5
200-299	1
300-399	1
400-499	3
500-599	1
Total	14

^aTwo firms did not answer.

Responses to a question regarding union affiliation of manufacturing employees in the Dallas women's apparel industry revealed that the greater portion of the industry is not unionized. Of 15 manufacturers, only one manufacturer reported that his plant is unionized. One manufacturer preferred to leave this question unanswered.

Research indicates that Dallas manufacturers employ several methods of wage payment. Eleven of the manufacturers interviewed, almost two-thirds of the sample, reported that their production employees are reimbursed for their work through payment by the piece, ten firms by hourly wages, one by the monthly wage payment basis. Three manufacturers did not answer the question regarding wage payment. Dallas manufacturers use various wage payment plans for different types of manufacturing employees and more than one type of payment within a firm.

Sources of materials, labor,
and design talent

As indicated by Table 3, materials for use in the manufacture of apparel in Dallas are not secured from sources located in the city itself, but principally from sources in New York, the Southwest, Texas, and other countries.

Table 3. Sources of labor, design talent, and materials by number of firms using sources

Locations	<u>Number of firms using sources</u>		
	Labor N ^a	Design Talent N ^b	Materials N
Dallas	14	9	0
New York	..	4	15
Texas, excluding Dallas	..	..	3
Southwest	..	..	3
Southeast	..	..	1
Los Angeles	..	1	..
Chicago	..	1	..
St. Louis	..	1	..
Import from abroad	..	..	11

^aTwo firms did not answer.

^bFour firms did not answer.

The Designers in the Manufacturing Firms

The designers associated with the women's apparel industry occupy an important position within the manufacturing firm. In this section, attention will be directed to the place of the designers in the firms located in Dallas. A group of designers was selected as representative of key people in the industry to be interviewed.

Experience and employment

The eleven designers comprising this part of the sample were questioned about their professional backgrounds. Relatively few of the designers in Dallas have been active in the industry for more than 25 years.

The designers also were questioned regarding the number of years they have been working with their present employers, though as shown in Table 4, no significant data were derived.

Table 4. Number of designers indicating experience and present employment by periods of years

Periods of years	<u>Number of Designers^a</u>	
	Experience	Present Employment
1- 4 Years	1	3
5- 9 Years	1	3
10-14 Years	2	2
15-19 Years	1	..
25-29 Years	3	..

^aThree designers did not answer.

Educational background

An examination of the designers' educational backgrounds revealed five designers had completed college requirements. Eight designers, about three-fourths of the total number of the sample, had special training in their profession.

Further investigation showed that a majority of the designers interviewed hold membership in their professional association. Seven designers are active members in the Dallas Fashion Group. The remaining four designers did not respond to the question.

Sources of design inspiration
and ideas

The designers interviewed mentioned many interesting sources of design inspiration and ideas:

Sources of Design Inspiration and Ideas:

	<u>Number of Mentions</u>
Art and fashion magazines and trade papers	7
Lengths of fabric	6
Fashion advertising services	4
Fashion shows	4
Other apparel markets	4
Merchandise in stores	3
Architecture	2
Social leaders	2
Travel	2
Social gatherings	1

The largest group of designers indicated they turn to art and fashion magazines and trade papers for their design inspiration. Six designers work with lengths of fabric for interesting design ideas.

Responses to the question, "Do you every copy or adapt designs from other sources?" show that eight of the

designers interviewed definitely do copy and adapt designs from other sources. Only one designer stated that he did not copy or adapt designs from other sources. Two designers did not respond to the question. Of those designers responding affirmatively to the question concerning design copy or adaptation, four sources were given:

Sources of Design Copy and Adaptation:

	<u>Number of Mentions</u>
Fashion advertising services	8
Former successful designs	7
High fashion merchandise in stores	7
News media	7

Dallas designers indicated they employ multiple methods of design creation:

Methods of Design Creation:

	<u>Number of Mentions</u>
Sketching	10
Draping fabric on dress form	9
Making and cutting patterns	5
Draping fabric on live model	4

Structure and organization of design departments

Questions were posed regarding the structure and organization of the design department within the manufacturing firm. Nine of the 11 designers interviewed indicated the existence of separate design departments directed by head designers. Two designers stated their firms do not include a separate design department.

More than half of the designers interviewed reported that each of their firms employs two designers. Three designers indicated that they are the only designers in their firms; and the remaining two designers stated that each of their firms employs three full-time designers.

From the selected group, eight designers indicated their firms do not employ a free-lance designer while three designers indicated their firms hire free-lance designers on occasion.

Only three of the designers interviewed design under their own names. The greater number, eight, produce under the names of the houses for which they work.

Summary

Most of the firms in the study were established in the decade of 1950. Founded as apparel manufacturing operations, each continues to operate in this capacity. A majority of the firms in the sample are owned by closed corporations. These firms rely upon commercial banks and factoring companies for financial backing.

A relatively large amount of the total product derived from the Dallas Women's Apparel Market is manufactured by the "inside-shop" method, as opposed to the extensive use of the jobber-contractor system. A majority of the manufacturers own one and two subsidiary production plants, usually located in small towns near Dallas.

Most of the manufacturers in the sample reported having between 100-199 production employees. Fourteen of the 16 manufacturers indicated that their employees have no union affiliation. The manufacturers in the sample use the hourly, piece, and monthly wage plans for their employees.

An examination of the Dallas manufacturers reveals that the manufacturers are most dependent upon Dallas and environs as sources of labor and design talent, and upon New York as source of materials.

Designers play vital roles within the Dallas women's apparel manufacturing firms. Only three of the designers interviewed have been active professionally for more than 25 years. The designers in the sample indicated that the number of years service to their present employers ranges from one to 14 years. Over half of the designers interviewed have completed high school, college, and special professional training. Seven of the 11 designers interviewed indicated they are active members of the Dallas Fashion Group.

Dallas designers derive design inspiration and ideas from many sources, including art and fashion magazines, trade papers, fabric, other apparel markets, fashion shows, and fashion advertising services. Most of the participants in the study indicated they do copy and adapt designs from other sources; the sources

mentioned include fashion advertising services, news media, former successful designs, and high fashion merchandise from prominent stores throughout the country. Research also revealed that Dallas designers use four main methods of design creation: sketching, draping fabric on dress forms, draping fabric on live models, and pattern-making.

Nine firms participating in the study have separate design departments within the structure of their organizations. These design departments are directed by head designers, do not utilize the services of freelance designers, and produce apparel under the name of the house rather than under the name of the designer.

CHAPTER V

TYPES OF APPAREL PRODUCED IN DALLAS

Dallas, as a manufacturing center, produces a variety of women's apparel to be marketed throughout the United States. The many different garments produced may be classified into categories according to types of design, price ranges, size and age ranges, and seasonal lines. Design types include two general classifications: structural and occasional. The consideration of price ranges concerns only the wholesale prices of garments. Age and size ranges are broad. Fall, Winter and Holiday, Spring, Summer, and Transitional seasonal lines identify characteristic wearing apparel manufactured in the Dallas Market.

Design Types

The many different types of garments produced by manufacturers and designers in Dallas have been classified into two general categories according to the form of the garment and suitability for purpose.

The structural design type relates to the use of lines and shapes achieved through the cut and manipulation of fabrics for garments of specific form.

Within the type of structural design, the garments produced by the ready-to-wear manufacturers have been classified as pants, slacks, and play togs; separates such as blouses and skirts; one-piece dresses; two-piece dresses; and two-piece and three-piece suits.

The occasional design type includes designs suitable for the occasion and "its purpose--school, street, business or formal occasion."¹ Occasional design has been used as a type for the design categories of casual sportswear, streetwear, dressy, and evening and holiday apparel.

The two design types categorized in this study express responses to the question, "What type of apparel do you design and manufacture?" The manufacturers and designers indicated the production of structural design types which were suited for many purposes and could be worn for a variety of occasions. Responses were separated for clarity, but at no time were the classifications considered to be mutually exclusive.

The structural design type

The number of designers and manufacturers producing wearing apparel of the categories within the

¹Marion S. Hillhouse, Dress Selection and Design (New York: The Macmillan Co., 1963), p. 31.

structural design type is presented in Table 5. Observation of the table points up the strength of the Dallas Market in the production of one-piece dresses and two-piece dresses.

Dallas has been an important producer of sports-wear, such as pants, slacks, and play togs; separates; and one-piece dresses since its beginning. In recent years, the Dallas Market retained its prominent position in the production of one-piece dresses, and achieved increasing attention because of its promotion of two-piece dresses and two-piece and three-piece suits. Moreover, this trend encouraged the establishment of new firms for the production of dresses and suits.

Table 5. Number of responses of designers and manufacturers who indicate production of structural design type wearing apparel

Structural Design Type	Responses of Designers N	Responses of Manufacturers N
Pants, slacks, and play togs	2	10
Separates	2	9
One-piece dresses	7	14
Two-piece dresses	7	13
Two-piece and three-piece suits	4	9

The occasional design type

Manufacturers and designers indicated the suitability of their women's apparel for occasional wear. Within the categories of casual sportswear, streetwear, dressy, and evening and holiday wear, the responses of the manufacturers indicated a slight emphasis upon streetwear and dressy clothes.

The direction toward which the Dallas Market is moving in the production of two-piece dresses and two-piece and three-piece suits also is manifest in the categories of occasional design apparel currently manufactured. Table 6 indicates as many designers and manufacturers producing dressy and evening and holiday apparel as casual and streetwear apparel. The data point to a trend toward producing more apparel within the dressy category than formerly.

Table 6. Number of responses of designers and manufacturers who indicate production of occasional design type wearing apparel

Occasional Design Type	Responses of Designers N	Responses of Manufacturers N
Casual sportswear	3	13
Streetwear	6	14
Dressy	..	15
Evening and holiday	4	12

Price

To specify the production of apparel in relation to price, it became necessary to classify Dallas-manufactured apparel into wholesale price range categories of \$1-9, \$10-19, \$20-29, \$30-39, \$40-49, and \$50 and over. Information compiled shows that the greatest concentration of apparel is produced in the \$10-19 and \$20-29 categories within the wholesale price range.

Table 7. Number of responses of designers and manufacturers who indicate production of wearing apparel within wholesale price categories

Wholesale Price	Responses of	Responses of
	Designers N	Manufacturers N
\$ 1- 9	4	8
\$10-19	5	12
\$20-29	5	12
\$30-39	4	9
\$40-49	2	9
\$50 and over	3	6

As Table 7 shows, the reputation of the Dallas Market lies in the production of medium-priced garments. Many manufacturers employ two or three designers, each of whom might specialize in a specific category within the wholesale price range. Moreover, several manufacturers customarily run the same design in two or

more categories within the price range, making appropriate changes in fabric, trimmings, and construction. In this way, manufacturers are able to cover the popular-priced, medium-priced, and better-priced markets.

Age

Dallas manufacturers and designers indicated their products were intended for persons ranging in age from children to women over 50 years. Other categories, which were used to classify the responses to questions regarding age, were teens 13-19 years of age and women 20-49 years of age.

Table 8. Number of responses of designers and manufacturers who indicate production of wearing apparel within age categories

Age	Responses of Designers N	Responses of Manufacturers N
Children	1	2
Teens 13-19 years of age	3	12
Women 20-49 years of age	11	16
Women over 50 years of age	6	5

The information presented in tabular form illustrates a predominance of Dallas-manufactured apparel being produced for women 20 to 49 years of age. This

conclusion is in line with previous appraisals of the Dallas Market.

Size

Dallas produces apparel for sizes ranging from that designated as Infants to Half-size $24\frac{1}{2}$. Six categories within the designated size range assisted the classification of Dallas-manufactured apparel. Information compiled by the researcher shows a predominance of apparel produced in the Misses size 8-20 category (Table 9). Fifteen of the manufacturers and nine of the designers interviewed produce apparel in the Misses sizes.

Table 9. Number of responses of designers and manufacturers who indicate the production of wearing apparel classified within the size categories

Size	Responses of Designers N	Responses of Manufacturers N
Infants, children, and subteens	2	2
Junior Petite sizes 3-11	2	4
Junior sizes 5-15	2	4
Misses Petite sizes 6-18	1	2
Misses sizes 8-20	9	15
Half-sizes $12\frac{1}{2}$ - $24\frac{1}{2}$	1	1

It may be concluded that the Dallas Market produces a variety of apparel. However, close examination of Table 9 shows a concentration of apparel in the Misses size category.

Seasonal Lines

Each year five different seasonal lines are presented by Dallas manufacturers to retail buyers at market showings. The seasonal lines traditionally are designated as Fall, Winter and Holiday, Spring, Summer, and Transitional. This study of the Dallas Market shows that all 16 manufacturers and 11 designers produce apparel for these five seasonal lines.

Findings reported in Table 10 illustrate the relative importance designers and manufacturers attach to each of the lines presented at market showings. The Fall line appears to be most outstanding, and the Spring line falls next in importance. Two of the designers interviewed considered the Transitional line most important, but nine of the manufacturers interviewed selected the Winter and Holiday or Summer lines as most important.

Further investigation reveals why the interviewees consider the various seasonal lines most important (Table 11). The greatest number of manufacturers, ten, consider the Fall line most important. The reason given by five

Table 10. Manufacturers' and designers' designation of most important seasonal line

Seasonal Lines	Designers N	Manufacturers N
Fall	4	8
Winter and Holiday	..	..
Spring	3	4
Summer	1	..
Transitional	2	1
All equally important	1	3
Totals	11	16

manufacturers is the greater dollar value invested in fabric and workmanship. Three considered it the major trend-setting line, one saw importance in the featuring of knits, and another the great back-to-school volume.

The responses of the designers were similar to those of the manufacturers in their selection of the most important seasonal line. As shown in Table 12, three of the designers interviewed considered the Fall line to be the most important because of its greater value in terms of dollars invested.

Table 11. Reasons given by manufacturers for selection of most important seasonal line

Reasons	Fall N	Spring N	Trans. N	Summer N	Winter and Holiday N
Costly fabrics and workmanship	5	..	..	..	..
Trend-setting line	3	..	..	..	..
Knits featured	1	..	..	..	..
Back-to-school volume	1	..	..	..	..
Easter	..	1	..	..	..
Greatest number of designs	..	1	..	1	..
People buy more	..	1	..	..	..
Southwestern climate	..	..	1	..	..
Totals	10	3	1	1	..

Table 12. Reasons given by designers for selection of most important seasonal line

Reasons	Fall N	Spring N	Trans. N	Summer N	Winter and Holiday N
Costly fabrics and workmanship	3	..	..	..	..
Biggest volume	2	1	..	..	..
Knits featured	1	..	1	..	..
Combines with Transitional line	1	1	..	..	..
Combines with Winter line	1	..	..	..	..
Totals	8	2	1	..	..

The Fall line has been shown by both groups to be the most important seasonal line because it is the most expensive, trend-setting line. Tables 11 and 12 show that the Spring line is next in importance, with the Transitional line following. No designers nor manufacturers considered the Winter and Holiday line as most important and only one manufacturer designated the Summer line as most important.

Summary

Dallas designers and manufacturers originally gained reputations through production of casual sportswear, separates, and one-piece dresses. Present market trends show, however, that Dallas women's apparel firms are producing more one-piece and two-piece dresses and two-piece and three-piece suits. As many dressy, evening and holiday designs are being produced as casual sportswear and streetwear.

Additional data indicate that medium-priced merchandise in the Misses size category dominates the Dallas women's apparel industry. All manufacturers and designers interviewed produce apparel for women from ages 20 to 49. A significant number of the firms also produce apparel for girls in their teens and women over 50 years of age.

Dallas manufacturers and designers participate in four seasonal markets and the Transitional market. The Fall and Spring lines are the most important markets; the Fall line, however, is the more expensive, trend-setting line.

CHAPTER VI

MARKETING THE APPAREL PRODUCED IN DALLAS

In its most general sense, merchandising refers to "buying and selling." Of great importance in the apparel industry, merchandising or some facet of it, takes place at all levels, from the production of fibers through the presentation in magazines, to the retailing of finished products. This chapter examines the specialized techniques in marketing women's apparel produced in Dallas.

Presentation and Distribution of Apparel

Traditionally, the producers of women's apparel have four basic selling seasonal lines: Fall, Winter and Holiday, Spring, and Summer. In recent years, Dallas manufacturers have added a fifth, the Transitional line, as a bridge between Summer and Fall lines. Several interviewees predicted growth of the Transitional line as the major market line in Dallas; another commented that the Transitional line, devoted almost exclusively to knits, affords his company its largest volume of production and sales.

One unique aspect of the Dallas market is the schedule of showings held earlier than in other markets. The Dallas showings are presented during the latter part

of January, March, May, August, and October. The March or early April dates are scheduled for the Transitional market.

Many of the 16 manufacturers in the sample reported informally that early timing of the market showings has made the Dallas Market successful. Retail buyers are frequently able to take advantage of climate and production fluctuations. In many instances these early schedules have placed Dallas in the role of test market for new trends in design, fabric, and color.

The selected manufacturers were asked to name the apparel markets throughout the nation in which they exhibit merchandise. As may be expected, the majority of manufacturers (15 out of 16) display their various seasonal lines in the Dallas Market (Table 13). About two-thirds of the sample participate in New York market showings, and over half display their merchandise in the Los Angeles market. Five manufacturers, representing almost one-third of the sample, mentioned showing their merchandise in five other relatively insignificant market centers: Charlotte, Houston, Little Rock, Memphis, New Orleans, Oklahoma City, Portland, and San Francisco. One manufacturer did not respond to the question.

Table 13. Number of manufacturers exhibiting in apparel markets

Apparel Market	Manufacturers Na
Dallas	15
New York	11
Los Angeles	9
Chicago	7
Atlanta	6
St. Louis	4
Miami	4
Seattle	1
Denver	1
Kansas City	1
Others	5

^aOne manufacturer did not indicate market showings.

The manufacturers were also questioned regarding their participation in specially-scheduled market showings. Eleven manufacturers indicated they participate in specially-scheduled market showings; two manufacturers indicated they do not participate in such showings. Three manufacturers did not respond to the question. Of the 11 manufacturers who responded affirmatively, all of them reported they participate in the regular Press Week showings sponsored by the Texas Fashion Creators Association.

An analysis of the distribution of Dallas-manufactured apparel from production plant to retailer shows that 15 manufacturers transport finished products directly to the retail outlets. None of the manufacturers indicated the use of a wholesale agent in their distribution system. The remaining member of the sample did not indicate the method used.

The producers of women's apparel in the sample were asked to identify the types of retail outlets utilized. Compilation of the data, Table 14, shows most manufacturers distribute merchandise to specialty shops or department stores.

Table 14. Number of manufacturers using types of retail outlets

Type of Retail Outlet	Manufacturers Na
Specialty Shops	15
Department Stores	14
Chain Stores	3
Mail-Order Houses	1
Discount Houses	0

^aOne manufacturer did not indicate type of outlet.

To determine the retailers' role in marketing Dallas-manufactured apparel, a fashion coordinator in an

outstanding Dallas specialty store and a buyer in a downtown department store were interviewed. Questioned about the types of Dallas-manufactured women's apparel sold in their stores, the two retailers responded that both stores sell items within the structural design type, as: pants, slacks, and play togs; one-piece dresses; two-piece dresses; and two-piece and three-piece suits. One retailer stocks separates which have been manufactured in Dallas. Both retailers reported they merchandise Dallas-manufactured apparel in all four occasional design type categories: casual sportswear, streetwear, dressy, and evening and holiday.

Responses to questions regarding the wholesale price range of Dallas-manufactured apparel purchased by the two retailers show that both retail outlets carry Dallas-manufactured apparel in the \$10-19, \$20-29, and \$30-39 categories. One retailer stocks Dallas-manufactured apparel in the \$40-49 category, and one retailer carries Dallas-manufactured apparel that wholesales for \$50 and over. Most of the merchandise purchased for these stores ranged from \$10 to \$39.

Both retailers indicated they stock Dallas-manufactured merchandise for a wide age range. They sell to the teenage category of 13-19 years, women in the range of 20-49 years, and also to women 50 years and over. The two retailers reported they carry Dallas-

manufactured merchandise in the size ranges of Junior, Misses Petite, and Misses.

Although both retailers reported their respective stores stock all five seasonal lines of Dallas-manufactured merchandise, their choice of most important seasonal line was not the same. One retailer selected the Fall line as the most important because it is the most expensive line produced. The second retailer selected the Spring line as the most important because manufacturers supply more merchandise and there is greater consumer demand for this line. Often times the Spring and Summer lines are combined for market showings because the two lines are so interchangeable.

The two retailers were asked to name the apparel market centers from which they purchase merchandise. Both retailers indicated the purchase of merchandise from market centers in both the United States and Europe. Retailers stated that they shopped "all over the world," but particularly in the United States. While one retailer indicated that her store closely shops the French, Spanish, and Italian buying markets, both retailers mentioned New York and Los Angeles in addition to the Dallas Market as sources of purchases.

To present an accurate description of their stores, the retailers were questioned regarding establishment and internal organization. Both stores

were established as specialty operations (one was originally a grocery and feed store). At the present time only one store has retained its specialty operation, while the other has branched out into department store operation. The ownership of both stores is of the closed corporation type. Seven branches of the two stores are located in Dallas and environs, and one store has branch operations in Fort Worth and Houston. Questioned regarding approximate volume of Dallas-manufactured apparel stocked in each store, one retailer indicated that his store buys about \$40,000 worth of wholesale Dallas-manufactured merchandise each year and has an approximate annual volume of sales of Dallas-manufactured women's apparel of \$1,000,000 - \$2,499,999. The other retailer preferred not to comment on either condition.

Promotional Activities

Promotional activities helped achieve the present status of the Dallas Market. Adams, in an investigation completed in 1958, concluded that the public relations activities in the Dallas Market contributed a major factor to its growth and development.¹

¹Margaret Adams, "Public Relations Activities as a Contributing Factor to the Growth and Development of the Dallas Fashion Market" (Unpublished Master's thesis, Department of Home Economics, The University of Texas, 1958), p. 72.

In response to the question "Do you use an advertising agency or public relations counselor to help you set up your advertising program?" (Appendix A, page 120) ten manufacturers indicated they utilize the services of professional advertising agencies. One manufacturer reported occasionally employing a free-lance artist to prepare art work. Five manufacturers indicated they do not utilize the services of professional advertising agencies.

The retailers participating in the interviews indicated they do not utilize the services of professional advertising agencies and public relations counselors. Both stores involved in this study have advertising and publicity departments within their own store organizations.

The manufacturers were questioned regarding the advertising media they utilize. Of the local advertising media available, three-fourths of the sample advertise in Texas Fashions, the official organ of the Texas Fashion Creators Association, and eleven manufacturers, almost two-thirds of the sample, advertise in Dallas newspapers.

National advertising media such as Vogue and Women's Wear Daily were mentioned by the manufacturers. Fashion magazines and newspapers published outside the Dallas area were used but less frequently.

Other types of advertising media employed by manufacturers included direct mail advertising and television. The variety of media utilized and the frequency of mention by manufacturers are shown in the following chart:

Advertising Media:	<u>Number of Mentions</u> ^a
Local Media	
<u>Texas Fashions</u>	12
Dallas newspapers	11
Direct mail advertising	8
Apparel Mart publications	2
Cooperative advertising with textile mills	2
National media	
<u>Vogue</u> magazine	10
Direct mail advertising	8
<u>Women's Wear Daily</u>	7
Newspapers published outside Dallas	7
Cooperative advertising with retail outlets outside Dallas	7
<u>Mademoiselle</u> magazine	5
<u>Seventeen</u> magazine	5
<u>Harper's Bazaar</u> magazine	3
Television	2
<u>American Fashion Association</u> magazine	1
<u>Charm</u> magazine	1
<u>Glamour</u> magazine	1
<u>New Yorker</u> magazine	1
<u>Town and Country</u> magazine	1

^aTwo manufacturers did not indicate advertising media.

The manufacturers tended to concentrate their advertising in one medium. Table 15 shows many used the national magazines although not the same magazine.

Table 15. Number of manufacturers concentrating upon different types of advertising media

Type of Advertising Media	Manufacturers N
Co-op ads with retail outlets	3
Direct mail advertising	2
<u>Seventeen</u> magazine	2
<u>Texas Fashions</u> magazine	2
<u>Vogue</u> magazine	2
<u>Harper's Bazaar</u> magazine	1
<u>Mademoiselle</u> magazine	1
<u>New Yorker</u> magazine	1
<u>Town and Country</u> magazine	1
<u>Women's Wear Daily</u>	1
Total	16

One prominent manufacturer, in commenting upon the importance of various advertising media, suggested that advertisements in Vogue magazine command the greatest amount of prestige, and that manufacturers advertise in the New Yorker in order to reach the eastern women. This manufacturer further pointed out that advertisements in Seventeen magazine reach the important late teenage

market, while advertisements in Mademoiselle reach the equally important college-age market.

The retailers participating in this study were questioned regarding the advertising media in which they promote Dallas-manufactured women's apparel. Both retailers indicated they utilize Dallas newspapers as advertising media. Other advertising media mentioned by one or the other of the retailers include direct mail advertising, radio, and cooperative magazine advertisements in national magazines as: Glamour, Harper's Bazaar, House and Garden, Life, New Yorker, Town and Country, and Vogue. Each retailer indicated an emphasis on advertisements in local Dallas newspapers more than any other media.

Additional research reveals that Dallas manufacturers have a variety of public relations activities. Twelve manufacturers participate in national and regional Press Week showings; 11 present fashion shows; and 11 stage trunk showings in retail stores. Six manufacturers customarily make personal appearances in retail stores to promote their apparel. The manufacturers' utilization of the various types of public relations activities are indicated in Table 16.

The retailers interviewed indicated participation in a variety of public relations activities which specifically promote Dallas-manufactured apparel. These retailers regularly stage fashion shows featuring Dallas apparel and present trunk showings in cooperation with

manufacturers. One retailer reported a store sponsorship of educational lectures and fashion clinics as part of its promotional program for Dallas-manufactured apparel.

Table 16. Number of mentions of manufacturers' utilization of types of public relations activities

Type of Public Relations Activities	Manufacturers N
Press Week	12
Fashion shows	11
Trunk showings	11
Personal appearances in retail outlets	6
Promotions with textile mills	3
State fair promotions	2
Apparel Mart promotions	1
Educational meetings with sales personnel in retail outlets	1
Television	1
Texas Fashion Creators Association promotions	1

Regarding the contributions of newspaper writers and personnel of trade and professional organizations, information was obtained by questioning representatives of two Dallas newspapers, two trade associations, one professional association, one promotional agency, one advertising agency, and one modeling agency.

Both Dallas newspapers, the Dallas Morning News and the Dallas Times Herald, employ fashion editorial writers who publicize and promote all phases of the

Dallas Women's Apparel Market. These fashion editors cooperate with promotional organizations at the Dallas Apparel Mart, and write for the consuming public rather than for the trade. Bert Holmes, executive editor of the Dallas Times Herald, made this statement in an interview:

The press has played an important role in making Dallas a fashion center. They are aware of the importance of the industry and the public has accepted their evaluation.

Numerous promotional agencies assist in the presentation of Dallas as an apparel market. Fashion Features, Inc., a promotional agency contracted by the Apparel Mart to handle its publicity, serves as a guide for buyers and handler of fashion shows for each market showing. Fashion Models, Inc., a commercial advertising agency, trains models for Dallas Market needs and serves as a placement agency for models. Polly Johnson and Associates, a commercial advertising agency with offices in the Dallas Apparel Mart, does a certain amount of work for Dallas manufacturers.

The Dallas Textile Club, a trade association of textile manufacturers, strives to create and maintain a spirit of fellowship, friendship, and cooperation among textile salesmen, the firms they represent, and their customers. Effort is directed toward promoting and developing Dallas as a textile center.

The Texas Fashion Creators Association, a trade association of women's apparel manufacturers, seeks five goals:

To promote and advertise the Texas women's and children's apparel market to the retail trade and to the public.

To expand recognition of Texas as an outstanding fashion center.

To cultivate a better understanding of the importance of a consolidated Texas market in promotion activities.

To provide effective and economical group trade purchases and promotions.

To foster the highest standards of practice in manufacturing and selling.²

The Dallas Fashion Group, a non-commercial association of women engaged in fashion work, was formed to advance the principles of applied art in industry and to foster good taste in fashion. The Fashion Group, Inc., desires to encourage cooperation among those creating fashion merchandise. One of its functions is the dissemination of useful information to inspire a keener interest in the fashion industries.

Organizations represented by the promotional directors participate in a variety of promotional activities. The group of directors interviewed indicated in Table 17 a utilization of both local and national media for

²Brochure published by the Texas Fashion Creators Association.

advertising. The Dallas newspapers, the Dallas Morning News and the Dallas Times Herald, Texas Fashions magazine, and Women's Wear Daily were used more frequently than other media.

Table 17. Number of mentions of promotional directors' utilization of advertising media

Advertising Media	Promotional Directors N ^a
Local Media	
<u>Texas Fashions</u> magazine	3
Dallas newspapers	3
Dallas Chamber of Commerce publications	2
<u>Southwestern Retailer</u>	1
Textile Directory	1
National Media	
Buyers guides for Dallas Market showing	2
<u>American Fashions</u> magazine	1
<u>Daily News Record</u>	1
Direct mail advertisements to buyers	1
<u>Women's Wear Daily</u>	1

^aOne promotional director did not indicate advertising media.

The promotional directors were questioned about activities other than paid advertising from which they draw publicity. Most common publicity sources came from retail store promotions, educational programs, and fashion shows. Five organizations cooperate extensively with retail stores in promotions. Unique in Texas is the "Miss Wool of Texas" contest. The great variety of promotional activities available to the directors is presented in Table 18.

The promotional directors were further questioned regarding the sources from which they obtain their personnel. Five organizations draw employees from the journalism profession. Two organizations have restricted membership. Two organizations obtain employees from the apparel industry, and one organization secures personnel from the retailing profession.

All of the promotional directors require special training of their staff members. Five organizations require newspaper experience and four organizations require experience in the apparel industry; one organization requires experience in retailing; one in advertising; and another in art layouts.

Table 18. Number of mentions of promotional directors' utilization of promotional activities

Promotional Activity	Promotional Directors N ^a
Retail store promotions	5
Educational programs for colleges and universities	4
Fashion shows	4
Cooperative mailing places	2
Entertainment for buyers during market weeks	2
Operation of Dallas Museum of Fashion	1
Personnel placement	1
Promotions sponsored by Dallas Fashion Group	1
Promotions sponsored by Fashion Features, Inc.	1
Press Week sponsored by Texas Fashion Creators Association	1
Other special promotions sponsored by Texas Fashion Creators Association	1
"Miss Wool of Texas" Contest	1

^aTwo promotional directors did not indicate promotional activities.

Extent of the Market

The extent of an apparel market is measurable in terms of geographic spread, the number of production workers and their wages, and the total volume of production and sales. Supplementary reports and materials made it possible to obtain some information regarding the

total volume and value of the Dallas industry in the metropolitan area. The total number of production workers and the amount of their wages are also included as indicative of the extent of the Dallas industry.

Geographic extent

The manufacturers interviewed indicated that buyers from many parts of the United States and numerous areas outside this country are attracted to the Dallas Market. These sources of buyers are presented in Table 19.

Data gathered by the Dallas Chamber of Commerce show that 75 cities of the United States, excluding cities of Texas, were represented by manufacturers' salesmen at a recent Dallas Market showing. The map, Figure 1, illustrates the extent to which salesmen are sent from other areas of the country.³

Further research shows that 407 cities, excluding cities of Texas, were represented by retail store buyers at a recent Dallas Market showing. Texas alone was represented by 387 cities.⁴ (See Figure 2)

Volume of production and sales

The manufacturers willing to reveal volume of production and sales estimated the value of their manufactured products and sales. The annual wholesale value

³"Selling, Vital Element in Apparel Industry," Dallas, Vol. 44 (Dallas: Dallas Chamber of Commerce, April 1965), p. 26.

⁴Ibid.

Table 19. Number of mentions of the geographic extent of the Dallas manufacturers' source of buyers

Geographic Area	Manufacturers N
Within the U.S.A.	
All over the U.S.A.	16
U.S.A., excluding New England states	3
Hawaii	3
Puerto Rico	3
Concentration in South, Southwest, and Southeast	2
Alaska	1
Concentration in Southwest	1
Concentration in South, Southwest, Southeast, and Midwest	1
Outside the U.S.A.	
Mexico	4
South America	3
Canada	2
England	1
Common Market	1
Curacao	1
Western Germany	1

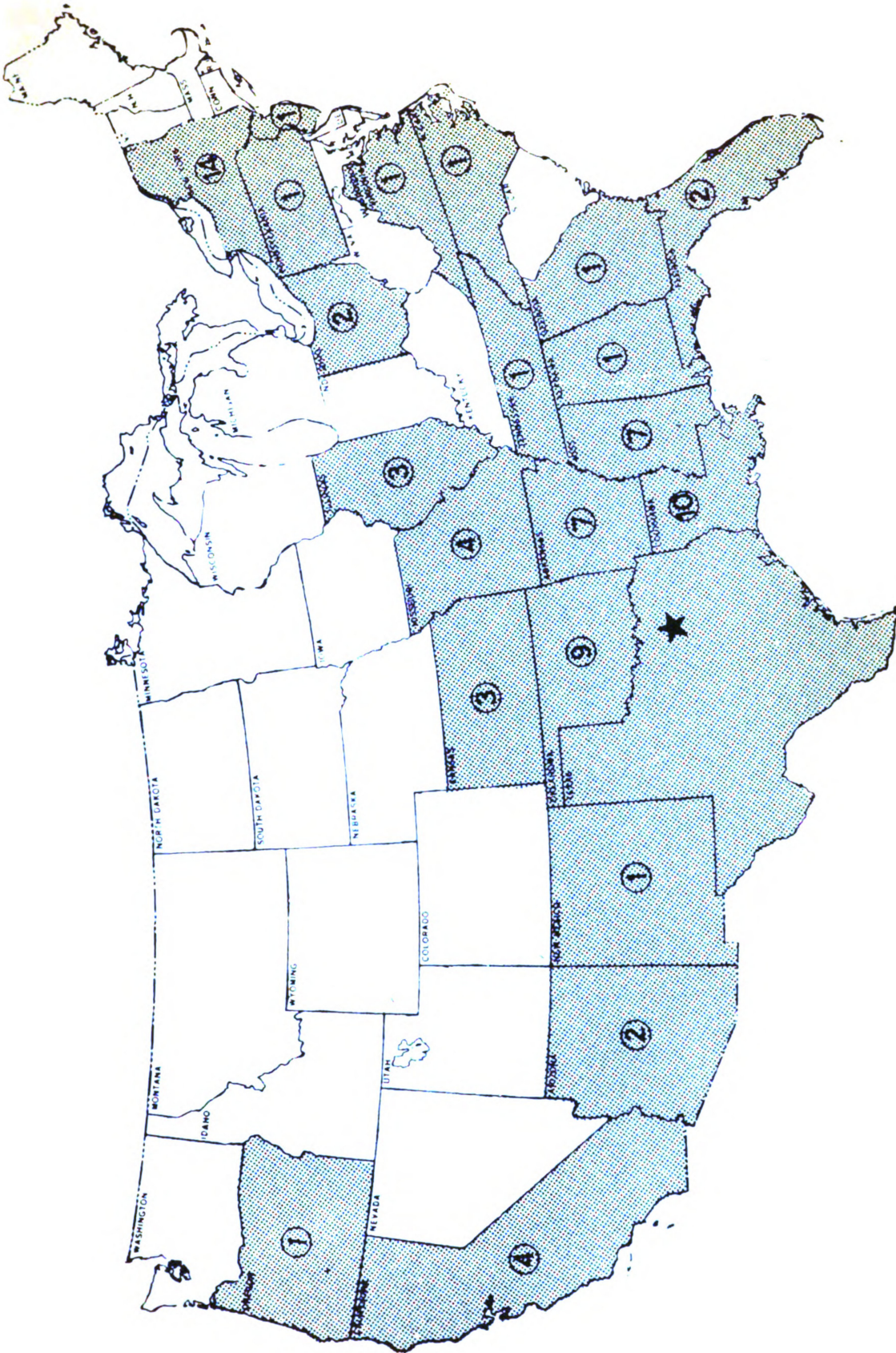


Figure 1. Number of cities, by state, excluding Texas, represented by manufacturers' salesmen at recent Dallas Market show

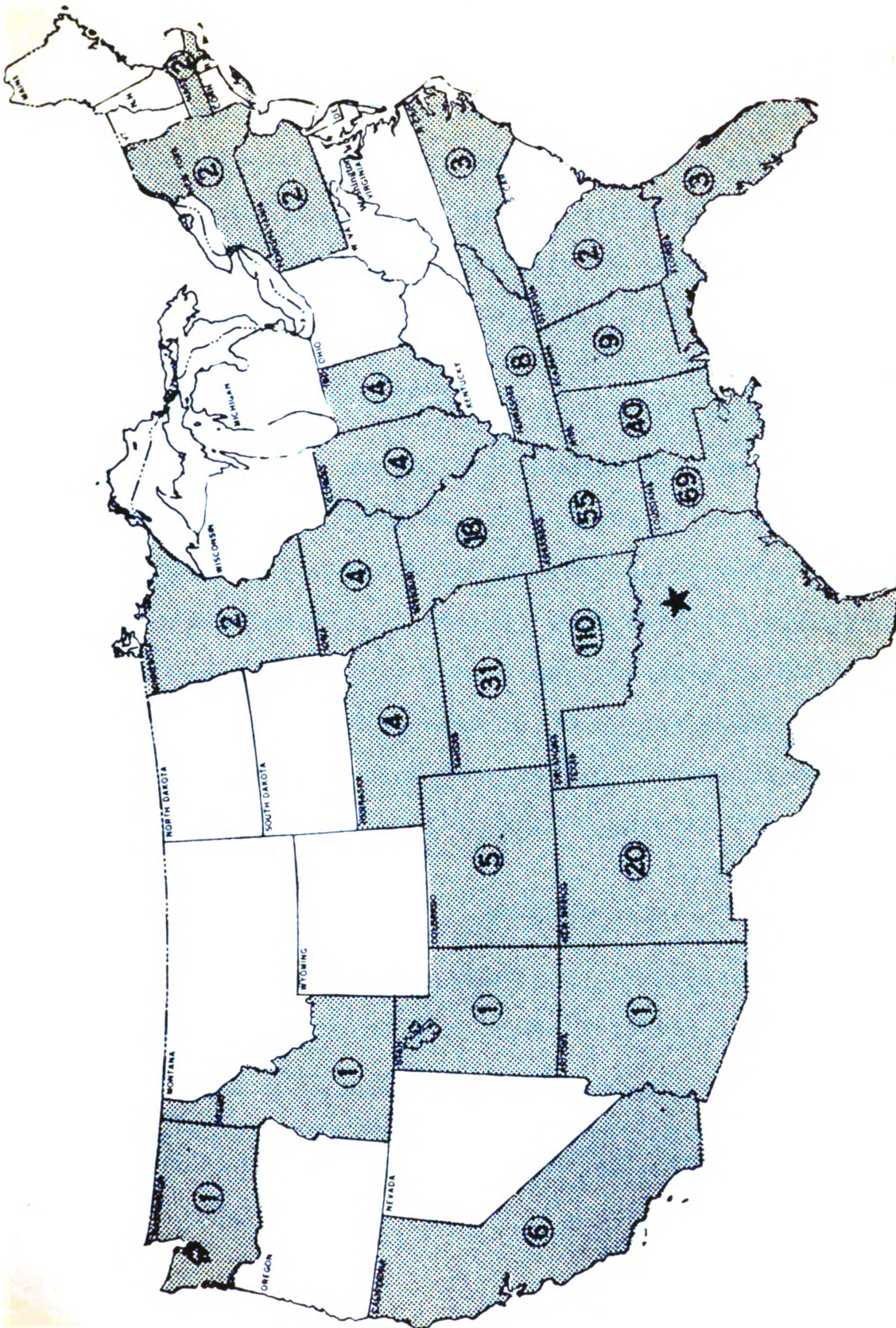


Figure 2. Number of cities, by state, excluding Texas, represented by retail store buyers at recent Dallas Market show

Note: Texas was represented by 387 cities.

of apparel produced by the seven manufacturers who provided an estimation ranged from \$100,000 to \$9,999,999. The total value of the products of the Dallas women's and misses' apparel industry was obtained from census data. The Preliminary Report of the 1963 Census of Manufacturers for the Area Series of Texas shows that the value added in that year by the manufacturers of the women's and misses' outerwear was \$49,580,000.⁵

Number of production workers
and wages

Additional general statistics for the Dallas metropolitan area show that out of a total of 97 establishments producing women's and misses' outerwear, 73 had 20 or more employees. In 1963 a total of 6,682 employees in the Dallas industry drew a payroll of \$23,826,000. Production workers numbered 5,796 of the 6,682 total employees. These workers represented a total of 11,825,000 man-hours and wages of \$18,229,000 for the year 1965.⁶

Summary

The marketing of women's apparel produced in Dallas resembles the marketing of women's apparel in other areas

⁵United States Bureau of the Census, 1963 Census of Manufacturers. Preliminary Report, Area Series: Texas.

⁶Ibid.

and other large markets such as New York City and Los Angeles. The Dallas industry is unique, however, in the early schedule of market showings which enable retail buyers to take advantage of climate and production fluctuations. Early showings have placed Dallas in the role of a test market for new trends in design, fabric, and color. In addition to their own market showings, Dallas manufacturers exhibit in a number of both regularly and specially scheduled showings throughout the country. The more important showings are those held in New York City, Los Angeles, Chicago, Atlanta, St. Louis, and Miami.

To distribute their products Dallas manufacturers transport merchandise directly to retail outlets without going through a wholesale agent. Specialty shops are the primary retail outlets for the majority of Dallas manufacturers, with department stores and chain stores serving as important distribution outlets as well.

The retailers in the sample indicated that they merchandise Dallas-manufactured apparel in all categories within the structural design type and the occasional design type at prices from \$10 to \$50 and over. The retailers sell Dallas-manufactured merchandise in the age range of 13 years to 50 years and over; in the size range of Junior, Misses, and Misses Petite; and in all five seasonal lines. Dallas retailers purchase merchandise

from market centers all over the United States as well as all over the world.

Responses of the members of the interviewed group show that specific advertising and promotions continually highlight Dallas fashions. Advertising and promotional media in which manufacturers, retailers, and promotional directors participate have been successful and effective tools in promoting the Dallas industry and in building a strong regional market. Buyers also carry the Dallas fashion story into Mexico, Puerto Rico, South America, Canada, England, and Western Germany.

The geographic extent of the Dallas Market is far reaching; the popularity of Dallas-manufactured apparel has risen within the past few years to build the strength of the market in volume of production and sales and in fashion importance. The Dallas Women's Apparel Market has attained important national as well as regional stature.

CHAPTER VII

SIGNIFICANCE OF THE DALLAS MARKET

Dallas is now recognized as an important market center in the United States. The achievement of this position has been accomplished during a period marked by a decentralization of the national industry and an accompanying development of regional markets. The success of the Dallas Women's Apparel Market may be attributed to its members' ability to produce designs and lines of apparel distinctive and expressive of the preferences of the Southwestern area, to present and distribute products broadly, and to make a significant contribution to the industry as a whole.

In an effort to determine the distinctive qualities of Dallas-manufactured apparel and the unique characteristics of the Dallas Market, the 39 representatives in the sample, including manufacturers, designers, retailers, promotional directors, and educators, were asked to respond to a series of questions which would reflect their opinions and viewpoints. The questions concerned predominate design characteristics of Dallas-manufactured apparel and the factors influencing these design characteristics. The questions also pursued unique facets of the presentation and promotion of the Dallas-

manufactured product. Questions were asked to determine the contribution of Dallas to the national apparel industry and opinions as to the potential of the manufacturing firms and future growth of the market.

Distinctive Characteristics of the Dallas Market

Dallas, as a regional market, offers women's and misses' apparel suited to the preferences of the women living in the area and expressive of the Southwest. There were varied opinions regarding the design characteristics which are unique to the Dallas-manufactured product.

Predominate design characteristics of the Dallas-manufactured product

Members of the sample were asked their opinions regarding the design characteristics of Dallas-manufactured wearing apparel. Replies to the question "What are the predominate design characteristics of women's and misses' apparel manufactured in Dallas?" (Appendix A, page 118) revealed an awareness of the importance of the use of color and fabrics, casualness and simplicity, fit, styling, and silhouette, but lacked specific designation of design characteristics. Their replies included other factors such as lines of apparel, wearability, price, and workmanship.

The sample, consisting of manufacturers, designers, retailers, promotional directors, and educators, responded with statements which designated "use of color" as the

most predominate of the design characteristics of apparel shown in Table 20. Comments such as "vibrant, bright

Table 20. Number of mentions of the predominate design characteristics of Dallas-manufactured products as indicated by manufacturers, designers, retailers, promotional directors, and educators

Predominate Design Characteristics	Manuf. N ^a	Des. N ^b	Ret. N	Pro. Dir. N	Educ. N	Total N
Use of color	12	8	2	6	5	33
Use of fabrics	10	7	4	6	3	30
Fit	7	6	2	6	2	23
Types of apparel	6	3	12	2	2	23
Simplicity	5	4	..	4	3	16
Casualness	4	3	2	3	2	14
Styling	5	1	1	2	2	11
Silhouette	3	3	2	..	3	10
Wearability	2	..	..	..	4	6
Workmanship	3	..	1	1	..	5
Price	2	1	..	1	..	4
Versatility	1	..	..	1	1	3
Other comments	4	1	..	..	..	5

^aTwo manufacturers did not answer.

^bTwo designers did not answer.

colors;" "conservative colors;" "distinctive flair in the use of color;" "subdued colors;" and "bright, clear colors" were recorded for this category.

The category designated as "use of fabrics" received the second highest number of mentions by members of the sample. Comments such as "interesting textures and patterns;" "use of knitted fabrics;" "use of soft, pliable fabrics;" and "elegance achieved through selection of fabrics" indicated the recognition of distinctive uses of fabrics.

The categories of "fit" and "types of apparel" received an equal number of mentions which ranked third in number of mentions by members of the sample. Characteristics such as "semi-fit" and "well-fitting" were included in the category of "fit." Comments regarding structural design type and occasional design type were included in the category of "types of apparel."

"Simplicity" and "casualness" are characteristics which were mentioned with considerable frequency.

The category of "styling" was the fourth most predominate group of design characteristics mentioned by members of the sample. Comments such as "good styling," "conservative styling," "tasteful styling," and "classic styling" were included in this category.

Comments such as "straight silhouette," "molded silhouette," "softly-tailored silhouette," and "natural and youthful silhouette" were placed in the category designated as "silhouette."

The category of "wearability of clothes" was the sixth most predominate group of design characteristics mentioned by members of the sample. Responses such as "comfortable clothes" were included in this category.

"Workmanship," indicating "good workmanship" and "quality workmanship" was mentioned five times by members of the sample.

Interviewees contributed such comments as "moderate price" and "conservative price" to the category of "price."

The category of "versatility," including "diversity of wardrobe" and "coordination," was mentioned three times.

Other responses which could not be classified were recorded. Three manufacturers mentioned that there were no identifiable predominate design characteristics in Dallas-manufactured apparel; they felt Dallas designers and manufacturers follow general fashion trends coming out of other market areas. One designer commented that Dallas apparel has "eye-appeal" and one manufacturer commented on the "easy-care" nature of Dallas-manufactured apparel.

To gain information regarding the significance of design qualities, members of the sample were further questioned regarding which categories of predominate design characteristics they considered more important

than the others. The category designated as the "use of color" received the highest number of mentions as the most predominate design characteristic of those summarized in Table 21. The category of "fit" ranked second in relative importance while the "use of fabrics" and "casualness" both ranked third.

Table 21. Number of mentions of the relative importance of predominant design characteristics as indicated by manufacturers, designers, retailers, promotional directors, and educators

Predominate Design Characteristics	Manuf. N	Des. N	Ret. N	Pro. Dir. N	Educ. N	Total N
Use of color	2	2	2	2	4	12
Fit	3	3	..	..	..	6
Use of fabrics	..	2	..	1	2	5
Casualness	1	2	..	2	..	5
Simplicity	1	1	..	1	1	4
Styling	1	1	..	..	..	2
Wearability	1	..	..	..	1	2
Versatility	1	..	..	1	..	2
Silhouette	..	1	..	..	..	1
Workmanship	1	..	..	..	..	1
Price	1	..	..	..	..	1
Types of apparel	..	..	..	..	..	..
Other comments	1	..	..	1	..	2

The category designated as "types of apparel" was not mentioned, but several other comments were recorded as replies to this question concerning the most predominate

design characteristics of Dallas-manufactured apparel. One manufacturer mentioned "a classic look with simple dignity" and one promotional director mentioned that Dallas-manufactured apparel is "easy to care for."

Composite opinions of members of the sample regarding the relative importance of the design characteristics indicated the following:

Predominate Design Characteristics:^a

	<u>Rank</u>	<u>Total Number of Mentions</u>
Use of color	First	12
Fit	Second	6
Use of fabrics	Third	5
Casualness		
Simplicity	Fourth	4
Styling	Fifth	2
Wearability		
Versatility		
Other comments		
Silhouette	Sixth	1
Workmanship		
Price		

^aThe category "types of apparel" was not mentioned.

Members of the sample were further questioned about factors they believed influence the predominate design characteristics coming out of the Dallas Market. Their responses were classified into nine categories as shown in Table 22.

Table 22. Number of mentions of factors influencing the designs of Dallas-manufactured products as indicated by manufacturers, designers, retailers, promotional directors, and educators

Influential Factors	Manuf. N	Des. N	Ret. N	Pro. Dir. N	Educ. N	Total N
Culture	17	8	3	6	2	36
General fashion trends	16	7	1	3	6	33
Way of life	15	6	1	7	1	30
Climate	13	6	2	5	3	29
Retail outlets	11	2	1	6	2	22
City and people of Dallas	5	7	1	3	2	18
Outside Dallas	1	4	1	..	1	7
Historic and geographic	..	..	..	4	1	5
General market characteristics	..	..	..	..	1	1

The category designated as "culture" received the greatest number of mentions from those who considered this an influential factor in design. The group contributed comments such as "culture of Dallas" and "culture of the Southwest." Members of the sample considered such conditions as "casual way of life," "need," "suburban living," "nautical sports," and "outdoor living" pertinent to the category of "way of life."

Fashion trends from areas other than Dallas were recognized as design influences. Thirty-three comments such as "designs coming out of the New York and Los Angeles markets" and "European fashion trends" indicated the importance of "general fashion trends."

The category designated as "climate" ranked as the fourth most important factor influencing designs coming out of Dallas. Respondents pointed out that the climate of the Southwest is influential in the selection of fabric used in the Dallas Market.

The influence of certain retail outlets was mentioned 22 times as being an important factor in the production of Dallas apparel. The retail outlets mentioned in this category were Neiman-Marcus, Frost Brothers, Sakowitz, chain stores, and the J.C. Penney Company.

Comments such as "fashion-minded women of Dallas;" "educated taste of Dallas women;" "Dallas is a mecca for young people;" "alert public in Dallas;" and "figure, size, and proportion of Dallas women" were recorded in the category designated as the "city and people of Dallas." These qualities seem to exercise great influence on designs produced in the Dallas Market.

Members of the sample felt that certain factors "outside Dallas" also have influenced designs produced in the Dallas Market. Conditions such as travel, fashion leaders, and tourists to Dallas were pertinent to this category.

Although closely related to the culture of this area, certain "historic and geographic influences" such as "Mexican-Spanish influences," "western-ranch influences," and "Indian influences" have exerted an effect upon the designing and production of Dallas apparel.

As may be expected, certain "general market characteristics" also have been important in the creation of designs coming out of the Dallas Market. These characteristics may be summarized as "integrity of Dallas manufacturers," "price structure of the Dallas Market," and "early timing of the Dallas Market." One educator considered the "demands of the consumer" to be of particular significance to the Dallas Market.

Presentation of the Dallas-manufactured product

The Dallas Market effectively employs several distinctive procedures in the presentation of its product. These procedures helped to build the enviable regional apparel market position Dallas holds today.

The Dallas Market shows, held five times each year in the Apparel Mart and Merchandise Mart, are major selling devices used by Dallas manufacturers. The two marts afford buyers the opportunity to see lines of Dallas manufacturers, as well as major manufacturers from other markets, under one roof. More than 7,200

retail store buyers from all over the country registered for the January, 1964, Summer Market Show.¹

The Merchandise Mart was the first of Dallas' mart facilities. Women's and children's apparel lines occupy a majority of its display rooms; however, its tenants also include "hard goods" manufacturers.

The new \$15 million Apparel Mart, designed specifically for the display of women's and children's apparel, opened in October, 1964, and immediately achieved international recognition for its unequalled market facilities.² With more than 1,000,000 square feet of floor space, the Apparel Mart has 1,250 display rooms fronting on four miles of corridors. All of the display rooms are fully manned for the four major and one minor market weeks during the year. Various special promotions concentrate on fill-in buying. A Great Hall in the center of the four-story structure can seat as many as 8,000 people for fashion shows and other similar events. The Apparel Mart also houses two smaller fashion theaters and the Dallas Historic Museum of Fashion.

The salesman functions as the major selling tool in the Dallas Market. He carries the new line to his

¹"Selling, Vital Element in Apparel Industry," Dallas (Dallas: Dallas Chamber of Commerce, April, 1965), p. 26.

²Ibid., p. 19.

customers weeks before scheduled showings and maintains daily contacts throughout his region. Reports of early reactions to the new line in his territory determine the ultimate production of a garment. The salesman has a major responsibility to keep retail store buyers coming back each season to the same manufacturer for new stock.

Manufacturers' salesmen also participate in local market shows within their territories. A prominent hotel, with lobby booths or hotel rooms utilized as display areas, serves as headquarters for the market show. These local area shows in such cities as Oklahoma City, Oklahoma; Amarillo, Texas; and Jackson, Mississippi, usually follow Dallas Market shows. Except for a few select calls made prior to the Dallas shows, the local show provides the first opportunity for the salesman to show his new line to local buyers. Area shows are diminishing somewhat in value because of the buyers' acceptance of the Dallas mart facilities.

Promotion of the Dallas-manufactured product

Dallas manufacturers also use distinctive sales and promotional tools to reach customers. The Texas Fashion Creators Association annually sponsors Press Week. At this event fashion editors from the newspapers of cities across the United States gather for previews

of manufacturers' lines. Ruth Wagner of the Washington Post wrote the following in the March 28, 1965, issue of her newspaper:

Dallas, Texas.--The story of fashion in Texas is the boom story of the whole Southwest. Fashion showings held here last week feature everything from budget priced play clothes to costumes retailing for several hundred dollars and beaded evening gowns tagged as high as \$1000. But only a few years ago, Dallas was known as the capital of housedress manufacture. Today, the cheap cotton housedress is unknown. In its place, Dallas ships out by the thousands, shifts, shirt-dresses, and sheaths all designer-styled or at least copied from recognized designers. At the moment, activity is high in dark-toned "transition cottons," destined to be seen not in the kitchen but on city streets.³

Advertisements capitalizing on the distinctive "Dallas-Look" appear regularly in Vogue, Harper's Bazaar, Mademoiselle, Glamour, Seventeen, the New Yorker, and other national magazines. Dallas manufacturers also furnish retail stores with advertising mats featuring their apparel. The mats to be reproduced in the retail store's local newspaper have space for the store name and retail price of the apparel. A number of Dallas apparel manufacturers have cooperative advertising plans, sharing the cost of newspaper space with the retail store.

³Ibid.

A fashion editor in the interviewed group commented that the success of the Dallas Market is a direct result of the strong support of the local newspapers. She believed the Dallas Market unique in this support; she observed lack of local newspaper support in the New York and Los Angeles markets.

In addition to the mentioned promotional activities, a number of manufacturers place attractive and colorful hang-tags on the merchandise. These tags identify the product as Dallas-manufactured and promote the distinctive qualities of the Dallas product.

Contribution of the Dallas Market to the National Industry

The trend toward a sharper delineation of the geographic and personal characteristics of the major regions of the United States has added impetus to the growth of regional markets.⁴ In turn, the diversity of cultures and tastes existent in the Dallas Market has enabled Dallas manufacturers to make unique contributions to the national apparel industry.

In an effort to determine the contribution of the Dallas Market to the production of apparel in the United States, members of the sample were asked, "Do you think

⁴ Frances Corey, "Do You Hear the Grass Roots Grow?" Store, Vol. 47, No. 6 (June 1965), p. 22.

the Dallas Market makes a unique contribution to the United States' fashion industry?" Thirty-four affirmative responses were recorded; five members of the sample did not answer the question.

Those interviewees who responded affirmatively were further questioned as to the way in which the Dallas Market made a unique contribution to the fashion industry of the United States. Table 23 shows statements classified under "designs suited to the Southwestern way of life" were mentioned most frequently and placed in the position of major importance. Noteworthy comments included in this category are: "interpretation of color, style, texture, and fabric suited to the Southwestern way of life;" "clothes designed for the casual way of life of women in the Southwest;" and "clothes with the Southwestern look."

The category designated as "unique characteristics of the Dallas Market " received the second highest number of mentions. Comments classified in this category referred to the large volume of the market, its central location, its operation and structure, and its competitiveness with other major markets. Additional respondents mentioned the early showings in the Dallas Market, the quick delivery dates of manufacturers, Dallas as a test market for new looks and fabrics, and the great influence of national retail chains on the apparel manufactured in Dallas.

Table 23. Number of mentions of the contributions of the Dallas Market to the fashion industry of the United States as indicated by manufacturers, designers, retailers, promotional directors, and educators

Contributions of the Dallas Market	Manuf. N	Des. N	Ret. N	Pro. Dir. N	Educ. N	Total N
Designs suited to the Southwestern way of life	12	2	2	5	2	23
Unique characteristics of the Dallas Market	8	3	2	2	2	17
Workmanship	3	3	1	1	1	9
Price	1	1	..	3	2	7
Styling	2	2	..	1	1	6
Practicality	..	4	..	..	2	6
Types of apparel	3	1	..	1	..	5
Use of fabric	1	3	..	..	..	4
Wearability	1	2	..	..	1	4
Climate	1	1	1	..	..	3
Fit	1	1	..	..	..	2
Color	1	..	..	..	..	1

Several other categories were mentioned as contributing to the distinctiveness of the Dallas Market. "Workmanship," "styling," and "practicality" were noteworthy qualities of the apparel produced. Classified in the latter category were comments such as "practicality of design and fabric" and "easy-care apparel." The distinctive "types of apparel" produced in Dallas received five mentions by members of the sample.

Concerning the "use of fabric," descriptions such as "use of silks and cottons all year around" and "use of distinctive fabrics" were offered by the respondents. Comments of "easy-to-wear clothes" and "clothes with great freedom of movement" were classified with "wearability."

The factor of "climate" was mentioned three times by representatives in the sample, who contributed such comments as "Dallas fashions meet our climatic needs" and "the Dallas Market services areas of the country which can't find clothes adaptable to their climate."

Terms such as "well-fitting," "unique fit," and "brighter colors" described other characteristics of apparel in the Dallas Market.

According to members of the sample, the two most valuable contributions which the Dallas Market makes to the total national industry are the production of designs suited to the Southwestern way of life and the unique characteristics of the Dallas Market itself.

Influence of the Dallas Market upon education

The Dallas community increasingly senses that educational resources are vital to both the social and economic welfare of the city. Members of the sample were questioned regarding the influence of the Dallas apparel market on Texas colleges and universities. Twenty-nine affirmative responses were recorded

in answer to the question, "Does the Dallas Market have a direct influence upon the design and retailing courses offered in Texas colleges and universities?" (Appendix A, page 119).

Members of the sample responding affirmatively were asked for statements to specify influences of the market on educational opportunities in the area. References were made to cooperative design programs, and numerous other programs including those of production, retailing, and the apparel marts. A summary is presented in Table 24.

Table 24. Number of mentions of the influences of the Dallas Market upon the design and retailing courses offered in Texas colleges and universities as indicated by manufacturers, designers, retailers, promotional directors, and educators

Influences of the Dallas Market	Manuf. N	Des. N	Ret. N	Pro. Dir. N	Educ. N	Total N
Cooperative design programs	6	4	..	2	4	16
Production-related programs	4	3	..	3	3	13
Retail training programs	1	2	2	3	4	12
Apparel Mart programs	..	..	..	1	1	2
Other programs	4	3	1	3	2	13

Mention was made of the programs at the recently discontinued School of Design at Southern Methodist University, the cooperation of the Dallas Fashion Group with future designers, the employment of apprentice designers from Texas colleges and universities by manufacturers, as well as the encouragement by manufacturers for the training of good designers through the sponsorship of a design school.

"Production-related programs" refers to the series of educational programs on factory production techniques sponsored by the Texas Fashion Creators Association. Dallas manufacturers often host tours and lectures in their plants. One respondent pointed out that increased employment opportunities in the Dallas Market influence college level courses.

The responses of members of the sample indicated the existence of "retail training programs" in the Dallas Market. Students from Texas Woman's University have participated in retail field experiences within the Dallas Market area for a number of years. Texas Christian University students also participate in Dallas retail training programs, although to a lesser extent. Two mentions, one by a promotional director and one by an educator, indicate that students from various Texas colleges and universities participate in "Apparel Mart programs."

Additional comments classified as "other programs" revealed the scholarship program of the Dallas Fashion Group, the Dallas Historic Museum of Fashion which is maintained by the Dallas Fashion Group and housed in the Apparel Mart, and the educational programs of the Texas Fashion Creators Association, as well as the educational and community service work performed by various leading manufacturers in Dallas.

The Future of the Dallas Market

Predictions for the future of the Dallas Market were both visionary and practical. Automation already has brought computers to do billing, invoicing, and payrolls. Electronic eye-controlled fabric spreaders in cutting rooms eliminate much of the manual straightening of fabric on cutting tables. Photocopying machines replace the tedious hand-tracing and carbon copy method of duplicating patterns. Machines feed buttons from a hopper automatically onto the dress at appropriate intervals. Dallas women's apparel manufacturers were among the first to adopt and refine permanent press techniques.⁵ These and many other developments in the market point to change and expansion.

⁵Dallas Chamber of Commerce, op. cit., p. 25.

To determine the future of the Dallas Market, representatives in the sample were asked the question, "What is your opinion as to the future growth potential of the Dallas Market?" As may be expected, most of the respondents enthusiastically predicted limitless growth.

Comments supported expansion in two major areas, changes in the product and changes in the industry. Changes in the product were categorized as "styling," "price range," "workmanship," "types of apparel," and "use of fabric." Changes in the industry refer to "expansion of the market," "expansion of manufacturing firms," and "expansion of training facilities."

Changes in the product

A large segment of the sample predicted a trend toward changes in the styling of Dallas-manufactured apparel. An equally large segment of the sample referred to the "price range" of Dallas-manufactured apparel, although there was disagreement among respondents as to the price range changes. However, a larger number of mentions in Table 25 refer to the trend toward producing more expensive clothing, while a smaller number of mentions predict the manufacture of more lower-priced lines.

Table 25. Number of responses of manufacturers, designers, retailers, promotional directors, and educators in answer to the question, "What is your opinion as to the future growth potential of the Dallas Market?"

Factors of Future Growth Potential	Pro.					Total N
	Manuf. N	Des. N	Ret. N	Dir. N	Educ. N	
Changes in the Product						
Styling	8	5	2	5	2	22
Price range	7	5	2	4	3	21
Workmanship	5	3	2	4	2	16
Types of apparel	4	3	2	1	4	14
Use of fabric	2	1	2	3	2	10
Total						83
Changes in the Industry						
Expansion of the market	7	7	1	5	3	23
Expansion of manu- facturing firms	4	..	..	..	3	7
Expansion of train- ing facilities	1	..	..	..	..	1
Total						31

Changes in "workmanship" were noted; "better workmanship" was predicted. Comments classified as changes in "types of apparel" refer to the production of more suits and dressier garments, the continued predominance of casual daytime dresses, an expanded range of lines from which to choose, greater emphasis upon "western wear," and the expansion of couture lines.

Mention was also made of future use of better fabrics in garments for the Dallas Market.

Changes in the industry

The representatives of the Dallas Women's Apparel Market expressed different opinions regarding changes in the industry, but the majority felt there would be expansion of the market, expansion of the manufacturing firms, and expansion of training facilities. Thirty-one of the 39 representatives interviewed suggested there would be noteworthy changes in the industry in the future.

The largest number of mentions regarding changes in the industry were concerned with the expansion of the market. Interviewees made the following comments: "the new Apparel Mart will greatly increase business in the Dallas Market," "the Dallas Market is striving to be second in the nation in fashion leadership and volume of production," "growth of the Dallas Market will parallel growth of industry in the Southwest," "textile firms will continue to pour money into the market," "the Dallas Market will continue to be a more stable market than the New York and Los Angeles markets," "new resources and design talent are constantly coming into the market," and "the Dallas Market has a greater future than any other regional market in the country." One manufacturer predicted that the labor union will begin to enter the Dallas Market in the near future.

The second important change in the Dallas industry appears in the area of "expansion of manufacturing firms." The seven mentions in this category concern the prediction that present firms will expand and form new subsidiaries and some believed that Northern manufacturers, recognizing the importance of the Dallas Market, will bring new firms into the area.

Of lesser importance is the predicted expansion of "training facilities." One manufacturer noted the establishment of more trade and operator schools to meet growing production staff needs.

The future of the Dallas Market as indicated by the responses of the representatives is closely allied to changes in the product and changes in the industry. There were 83 comments relative to changes in the product and 31 comments regarding changes in the industry. Although there were frequent mentions of the expansion of various aspects of the market, the future of the Dallas Market, in the opinions of those questioned, lies in the distinctive apparel produced in Dallas.

Summary

The Dallas Women's Apparel Market as described by the 39 members of the sample is unique in its production of apparel with the distinctive "Dallas-Look." The predominate design characteristics appear to

be: unique use of color and fabric; distinctive fit, styling, and silhouette. Dallas designers and manufacturers achieved their reputation through production of simple, casual, semi-fitted, tastefully designed, and coordinated garments molded from distinctive fabrics. These producers of apparel are noted more for distinctive use of color than for exclusive use of either bright, sun-drenched colors or muted, conservative colors.

While general fashion trends in major United States and European markets must be recognized, the way of life in the Southwest and its climatic conditions greatly influence Dallas Market designs. Dallas designers and manufacturers often adapt, rather than copy fashion trends and design characteristics of other markets. They create apparel for the needs and demands of Southwestern women. That these characteristics meet the needs of women throughout the nation is apparent by the growth of retail chain store buying in the Dallas Market.

Dallas has distinctive procedures in the presentation and promotion of the Dallas-manufactured product. The frequency of Dallas Market shows, the facilities of two apparel marts, and extensive promotional activities make Dallas fashion showings of regional and national importance.

The Dallas Market contributes to the national apparel industry mainly in the designing and manufacturing of distinctive, fashionable, medium-priced apparel

well-suited to the Southwestern way of life. Representatives of the Dallas Market consider it the third largest fashion market in the nation, important more for its production of fashion apparel with the distinctive "Dallas-Look" than for its volume of production or innovation of fashion trends.

The contribution of the Dallas Market to higher education in Texas has been two-fold: the industry itself serves as a laboratory for students concerned with the designing, production, and marketing of apparel, and individual firms and organizations provide scholarships to stimulate further study in this field.

Members of the sample describe the future growth potential of the Dallas Market as "limitless." They predicted that upgrading in styling, pricing, workmanship, and use of fabrics will draw production away from sportswear to designer-type apparel. The interviewees expect an increasing number of firms to enter the market as present firms expand and form new subsidiaries. Northern manufacturers may establish new firms in Dallas because of the predominantly union-free labor force. With typical loyalty and enthusiasm, Dallas designers and manufacturers foresee their firms supporting a stronger regional market than now exists and achieving the position of the second largest fashion market in the nation.

CHAPTER VIII

SUMMARY AND RECOMMENDATIONS

Summary

The Dallas Women's Apparel Market, one of the regional markets which developed during the decentralization of the national industry, has become one of the strongest in the country. The contribution of the Dallas Market to the rapidly developing economy of Texas and the nation prompted this study which has two primary objectives: first, to review the development and general organization of the Dallas Women's Apparel Market, and second, to discover the present status of the Dallas Market regarding such aspects as the structure and operation of manufacturing firms, types of apparel produced, the presentation and distribution of apparel manufactured in Dallas, promotional activities, and the extent of the market. In order to accomplish these objectives it also was necessary to devote attention to the historic growth and development of the Dallas Market.

Information regarding the present status of the Dallas Market was obtained from a selected group of key persons knowledgeable and active in the Dallas Women's

Apparel Market. Four structured interview schedules were used for the collection of data from 16 manufacturers, 11 designers, two retailers, six promotional directors, and four educators. These key people were asked questions which revealed factual information and permitted the expression of opinions and viewpoints, especially concerning future developments, expansion, and foreseeable changes.

The interviews brought out many factors unique to the Dallas Market, and pointed to the contribution of the Dallas Market to the regional area and to the national industry.

The strength of the Dallas Market depends on manufacturing firms, similar in structure and operation to firms in other parts of the country, but with some distinguishing differences.

A majority of the firms participating in the study are small manufacturing establishments utilizing the "inside-shop" method of production. Many manufacturers own one or two subsidiary production plants generally located in small towns near Dallas. Research shows a relative absence of unionization in the present Dallas Market.

Manufacturers included in the sample depend principally upon Dallas and environs as sources of labor and design talent. Materials for the manufacture of apparel are imported from New York and abroad. The areas of Texas and the Southwest also are sources of supply.

Most firms participating in the study have separate design departments within their organizations directed by head designers. Research reveals that the average women's apparel firm in Dallas employs two designers, does not utilize the services of free-lance designers, and produces apparel under the name of the house rather than under the name of the designer.

Most designers employed by the Dallas manufacturing firms had special training in designing and were active professionally within a range of 10 to 25 years. The period of time spent with present employers was designated as less than 10 years by over half of the group interviewed.

Dallas designers indicated they derive design inspiration and ideas from the usual sources: art and fashion magazines, trade papers, fabric, other apparel markets, fashion shows, and fashion advertising services. Most designers use multiple methods of design creation. Dallas designers copy and adapt designs from other sources in their attempt to produce suitable apparel for the needs and demands of Southwestern women.

Although Dallas designers and manufacturers originally gained their reputations through the production of casual sportswear, separates, and one-piece dresses, firms participating in the study currently produce more one-piece and two-piece dresses and two-piece and three-piece suits. Dallas now produces as many dressy and

evening and holiday designs as casual sportswear and streetwear.

The production of medium-priced merchandise in the Misses size category is dominant in the Dallas Market. Dallas manufacturers participate in four seasonal market showings and the Transitional market showing bridging Summer and Fall lines. Investigation shows the Fall and Spring lines as the most important markets. The Fall line, however, is the more expensive, trend-setting line. The Transitional line, a recent addition, is becoming one of Dallas' most important.

The marketing of women's apparel manufactured in Dallas is similar to other markets, but Dallas has outstanding facilities for the presentation of the manufacturers' products. The Merchandise Mart and the new Apparel Mart furnish not only specifically designed display spaces and auditoriums for fashion shows, but also house a Dallas Historic Museum of Fashion.

Dallas firms present their products at early market showings which enable buyers to take advantage of climatic and production fluctuations. A schedule of early showings has placed Dallas in the role of a test market for new trends in design, fabric, and color.

Many firms exhibit in a number of market showings throughout the country in addition to the showings in

Dallas. In this way, Dallas firms have extended their sales and appeal over a wider area.

The Dallas Women's Apparel Market has attained important regional and national stature partly because of the far-reaching geographic extent of the market. Buyers and fashion editors carry the Dallas fashion story to many parts of the United States as well as into Mexico, Puerto Rico, South America, Canada, England, and Western Germany. The Dallas showings attract buyers from all parts of this country, Hawaii, and Alaska. However, many manufacturers tend to concentrate their sales in the Southern, Southwestern, and Southeastern regions of the United States.

Manufacturers in Dallas send their products directly to retail outlets. Specialty shops are primary retail outlets for the majority of Dallas producers, although department stores and chain stores also perform important functions of distribution.

The retailers interviewed reported they merchandise Dallas-manufactured apparel in all categories within the structural and occasional design types, at prices from \$10 to \$50 and over. These retailers sell Dallas-manufactured merchandise in the size range of Junior, Misses, and Misses Petites in all five seasonal lines. The retailers interviewed for the sample purchase merchandise

from market centers all over the United States as well as in other parts of the world.

Distinctive procedures in the promotion of Dallas-manufactured apparel have contributed greatly to the growth and development of the Dallas Market. Manufacturing firms and retailers, assisted by writers and personnel of promotional organizations, utilize an extensive variety of public relations activities to promote Dallas as both a local and a national apparel market. Numerous organizations, such as the Texas Fashion Creators Association and the Dallas Fashion Group, specifically foster and promote the apparel market in Dallas.

The Dallas Market makes a significant contribution to the apparel industry, according to representatives comprising the sample, through the production of distinctively designed outerwear and through the presentation and promotion of apparel with the "Dallas-Look." Dallas products are characterized by unique use of color and fabrics, and by distinctive fit, styling, and silhouette.

Original designing, as well as skillful adaptation of general fashion trends, has created apparel meeting the needs and demands of Southwestern women with respect to culture, way of life in the Southwest, and climatic conditions. The growth of retail chain store buying in the Dallas Market reflects the successful, widespread acceptance of the "Dallas-Look" in women's outerwear.

The findings of this study reveal that the major contribution of the Dallas Market is the design and manufacture of distinctive, medium-priced apparel well-suited to the Southwestern way of life. The Dallas Market, considered as one of the most important fashion markets in the nation, is known more for its production of fashion apparel with the distinctive "Dallas-Look" than for its volume of production or innovation of fashion trends.

According to members of the sample, future activities in the Dallas Market will be characterized by production specialization of designer-type apparel and saleability enhanced by the distinctive "Dallas-Look." An increasing number of firms are expected to enter the market, with the majority of manufacturers seeking to produce moderate to better priced apparel not associated with radical fashion innovation.

The most significant growth in women's apparel production in Dallas has occurred in recent years. The future of the Dallas Market is difficult to forecast; however, if current favorable conditions, including the relative absence of unionization, continue, there is every reason to believe that substantial growth will continue.

Recommendations

The Dallas Women's Apparel Market study is an initial effort toward an analysis of the regional markets of the national apparel industry. Further studies of other regional markets of importance would lead to an appraisal of not only those regional markets, but an evaluation of their part in the national apparel industry.

Replication of this exploratory study involving other significant apparel markets would contribute to a body of existing knowledge. Further study utilizing a larger sample population would provide opportunity for more conclusive analysis of the various apparel market functions.

Replication of this study utilizing a higher structured interview schedule or questionnaire and fixed-alternative questions would provide information to help assess the position and value of the regional markets.

Finally, further research leading to comparative studies of regional markets and their part in the national apparel industry would result in a report of great value to education, business, and industry.

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APPENDIX A

APPENDIX A

Interview Schedule for Dallas Women's Apparel Market Study^a

PART I

The fact that Dallas has become a leading market for women's apparel has prompted a study of the present status of the Dallas Women's Apparel Market. Because of your position of influence and responsibility in the market, I think you could contribute much valuable information about the Dallas Market. I would very much appreciate your cooperation in the research.

I am going to begin by asking a few general questions about the women's apparel market in Dallas.

1. What do you think influences designs produced in the market? _____

In what ways? _____

Do you feel that these influences have added to the scope and prestige of the market? _____

Do you feel that one of the factors might have greater influence than the others?

___ No

___ Yes If yes, which one, and in what way? _____

2. What are the predominate design characteristics of women's apparel manufactured in the Dallas Market? _____

Is there one design characteristic which is more important than the others?

___ No

___ Yes If yes, which one, and in what way? _____

^aAppendix A is reduced from original interview schedule which allowed adequate space for recording responses.

3. Do you think the Dallas Market makes a unique contribution to the United States fashion industry?

___ No

___ Yes If yes, in what way? _____

4. Does the Dallas Market have a direct influence on the design and retailing courses offered in Texas colleges and universities?

___ No

___ Yes If yes, in what way? _____

5. What is your opinion as to the future growth potential of the Dallas Market? _____

PART II

Now I would like to get more specific and ask you some questions about your own firm.

6. What type of apparel do you design and manufacture?
By this I mean structural design type, occasional design type, price range, age range, size range, seasonal lines?

Which seasonal line is most important? Why? _____

7. I would like to know something about the scope of your operation. Where do you send your apparel? From what areas, including national and international, do you draw buyers? _____

8. I would like to know a little about your over-all advertising program. In which advertising media do you participate, both locally and nationally?

Do you emphasize any one medium more than the others?

___ No

___ Yes If yes, which one, and in what way? _____

9. Are there any other activities such as exhibits or style shows from which you draw publicity? _____

10. Do you use an advertising agency or public relations counselor to help you set up your advertising program?
____ No
____ Yes If yes, in what way? _____
11. In which associations, both local and national does your firm hold membership? (American Fashion Assoc., Dallas Manufacturers' Assoc., Dallas Fashion Creators Assoc., Dallas Fashion Group, Dallas Textile Club, National Fashion Exhibitors of America) _____

I have a brief two-page check sheet of some procedural information that I need for my analysis of the Dallas Market. These are factors related to the production and marketing operations of your firm. Do you have time to complete the sheet now, or is there someone else to whom you could refer me who might have time to help me with it?

Background Information on Production and Marketing Operations

- | | |
|--|---|
| 1. Name of firm: _____ | 4. Present type of operation:
____ Manufacturer
____ Jobber
____ Contractor
____ Wholesaler |
| 2. Date of establishment of firm: _____ | |
| 3. Type of operation established:
____ Manufacturer
____ Jobber
____ Contractor
____ Wholesaler
____ Other (please specify) | 5. If manufacturer, which method of production:
____ Inside-shop
____ Jobber-contractor |

6. Present ownership of firm:
- ☐ Individual
 - ☐ Partnership
 - ☐ Closed corporation
 - ☐ Open corporation
 - ☐ Other (please specify)
7. Method of financing:
- ☐ Commercial banks
 - ☐ Jobbers
 - ☐ Contractors
 - ☐ Factoring companies
 - ☐ Textile manufacturers
 - ☐ Other (please specify)
8. Source of materials:
- ☐ Dallas
 - ☐ Texas
 - ☐ Regional
 - ☐ New York
 - ☐ Import materials
 - ☐ Other (please specify)
9. Number of production plants: _____
10. Location of production plants:
- ☐ Dallas
 - ☐ Ft. Worth
 - ☐ Austin
 - ☐ San Antonio
 - ☐ Houston
 - ☐ Other (please specify)
11. Number of production employees: _____
12. Method of wage payment:
- ☐ Hourly
 - ☐ Piece
13. Union affiliation:
- ☐ Yes
 - ☐ No
14. Source of labor supply:
- ☐ Local labor
 - ☐ From Mexico
 - ☐ Other (please specify)
15. Source of design talent:
- ☐ Local
 - ☐ New York
 - ☐ Other fashion centers (please specify)
16. In which apparel trade centers do you exhibit your merchandise?
- ☐ Dallas
 - ☐ New York
 - ☐ Chicago
 - ☐ St. Louis
 - ☐ Los Angeles
 - ☐ Miami
 - ☐ Other (please specify)
17. Do you exhibit your apparel at any special market showings?
- ☐ No
 - ☐ Yes If yes, please specify _____

- | | |
|---|---|
| <p>18. Which distribution channel does your firm utilize?</p> <p>☐ Direct factory-to-retailer</p> <p>☐ Factory to wholesaler for resale</p> | <p>20. Approximate wholesale value of these garments:</p> <p>☐ Under \$100,000</p> <p>☐ \$ 100,000- 249,999</p> <p>☐ \$ 250,000- 499,999</p> <p>☐ \$ 500,000- 999,999</p> <p>☐ \$1,000,000-2,499,999</p> <p>☐ \$2,500,000-4,999,999</p> <p>☐ \$5,000,000-9,999,999</p> <p>☐ \$10,000,000-24,999,999</p> |
| <p>19. Which types of retail outlets does your firm utilize?</p> <p>☐ Department stores</p> <p>☐ Chain stores</p> <p>☐ Discount houses</p> <p>☐ Mail-order houses</p> <p>☐ Specialty shops</p> | |

PART III

Now I would like to get more specific and ask you some questions about your own work.

6. How many years have you worked as a professional designer? _____
7. How many years have you designed with this firm? _____
8. In general, what educational requirements have designers in this firm completed?
- ☐ High School
- ☐ College
- ☐ Special Training. If special training, what does this training involve? _____
9. What type of women's apparel do you design? By this I mean structural design type, occasional design type, type, price range, size range, age range, seasonal lines. _____
- Which seasonal line is most important? Why? _____
- How many garments make up one collection? _____
- Do you design for a specific geographic region?
- ☐ No
- ☐ Yes If yes, which one? _____

10. I would like to have information on factors concerning the organization of the design department in this firm. For example, is it a separate design department within the firm?

☐ No

☐ Yes

Who directs it? _____

How many designers are employed by this firm? _____

Does the firm ever utilize the services of freelance designers?

☐ No

☐ Yes

Do you design under your own name or the name of the house?

☐ Own name

☐ House

Any other information pertinent to the design department: _____

11. Where do you get your inspiration, your ideas, for designs? (Other fashion centers, art and fashion magazines, lengths of fabric) _____

Do you ever copy or adapt designs from other sources?

☐ No

☐ Yes If yes, from which sources? _____

12. What method of design creation do you use?

☐ Sketching (finished sketch, quick line drawing, croquis)

☐ Draping fabric on dress form

☐ Draping fabric on live model

☐ Other (please describe) _____

13. In which associations do you hold membership, on both the local and national levels? _____

PART IV

Now I would like to get more specific and ask you some questions about your own store.

6. What type of Dallas-manufactured apparel do you sell in your store? By this, I mean such factors as structural design type, occasional design type, price range, size range, age range, seasonal lines. _____

Which seasonal line is most important? Why? _____

7. I would like to know something about the scope of your operation. Where do you buy the women's apparel you sell in your store? From which apparel trade centers, including national and international, do you purchase merchandise? _____

8. I would like to know a little about your over-all advertising program. In which advertising media do you promote Dallas fashions, both locally and nationally? _____

Do you emphasize any one medium more than the other?

___ No

___ Yes If yes, which one, and in what way? _____

9. Are there any other activities such as exhibits or style shows in which you promote Dallas fashions?

___ No

___ Yes If yes, please describe _____

10. Do you use an advertising agency or public relations counselor to help you set up your advertising program?

___ No

___ Yes If yes, in what way? _____

11. In which Dallas fashions promotional associations does your store hold membership? (Include national and local associations) _____

I have a brief one page check sheet of some procedural information which I need for my analysis. These are factors related to the general background and development of your store. Do you have time to complete the sheet now, or is there someone else to whom you could refer me who might have time to help me with it?

BACKGROUND INFORMATION

- | | |
|---|---|
| <p>1. Name of store: _____</p> <p>2. Date of establishment of store: _____</p> <p>3. Type of store established:</p> <p>____ Department Store</p> <p>____ Specialty Shop</p> <p>____ Chain Store</p> <p>____ Discount House</p> <p>____ Mail-order House</p> <p>4. Present type of store:</p> <p>____ Department Store</p> <p>____ Specialty Shop</p> <p>____ Chain Store</p> <p>____ Discount House</p> <p>____ Mail-order House</p> <p>5. Present ownership of store:</p> <p>____ Individual</p> <p>____ Partnership</p> <p>____ Closed corporation</p> <p>____ Open corporation</p> | <p>6. Are there other branches of this store?</p> <p>____ No</p> <p>____ Yes If yes, where?</p> <p>_____</p> <p>7. What is the approximate volume of Dallas-manufactured women's apparel that you stock in your store?</p> <p>_____</p> <p>8. What is this store's approximate annual volume of sales of Dallas-manufactured women's apparel?</p> <p>____ Under \$100,000</p> <p>____ \$ 100,000- 249,999</p> <p>____ \$ 250,000- 499,999</p> <p>____ \$ 500,000- 999,999</p> <p>____ \$ 1,000,000- 2,499,999</p> <p>____ \$ 2,500,000- 4,999,999</p> <p>____ \$ 5,000,000- 9,999,999</p> <p>____ \$10,000,000-24,999,999</p> |
|---|---|

PART V

I would like to get more specific and ask you some questions about your own work.

6. What groups or individuals are involved in your organization? How long have you been organized? _____
7. What are the functions of your organization? How does it operate? Who directs it? _____
8. I would like to know a little about your over-all advertising program. In which advertising media do you participate, both locally and nationally? _____
Do you emphasize any one medium more than the others?
____ No
____ Yes If yes, which one, and in what way? _____
9. Are there any other activities such as exhibits or style shows from which you draw publicity? _____
10. Do you use an advertising agency or public relations counselor to help you set up your advertising program?
____ No
____ Yes If yes, in what way? _____
11. From what source do you get your personnel? _____
Do you require special training of your staff members?
____ No
____ Yes If yes, what does this training involve? _____
12. In which associations that promote Dallas fashions are you affiliated? (both local and national)

APPENDIX B

APPENDIX B

February 20, 1965

Dear

The fact that Dallas has become a leading market for women's apparel has prompted a study of the present status of the Dallas Women's Apparel Market. Because of your position of influence and responsibility in the Dallas Market, the information you may contribute regarding the production and marketing of Dallas fashions will be a valuable part of the research.

I am a Master's degree candidate in the Department of Textiles, Clothing and Related Arts at Michigan State University and have chosen to write my thesis on the Dallas Women's Apparel Market. My home is San Antonio, Texas. I was graduated from The University of Texas in 1963 with a Bachelor of Science degree in Home Economics. You may be acquainted with two of my former professors, Mrs. Anna Marie Caswell and Mrs. Tracy Aycock. They are assisting me with my research, as are Dr. Edna Brandau from Texas Christian University and Dr. Bethel Caster from Texas Woman's University.

I am planning to be in Dallas March 10-28th to collect data. I would like to have a conference with you sometime during this period, at your convenience. May I contact your office for an appointment when I arrive in Dallas?

Thank you for your consideration. I am looking forward to talking with you in March.

Sincerely,

Jeanne Golly

APPENDIX C

APPENDIX C

List of Cooperating Firms

Charles Dickey
Cupaoli-Leeds
Donovan-Galvani
Herman Marcus, Inc.
Howard Wolf
Jean Thomson
Jennifer Jr.
Justin-McCarty
Lorch-Westway Corp.
Miller-Randazzo
Nardis of Dallas
McKell's Sportswear
Page Boy, Inc.
Parkland of Dallas
Sue Ann Mfg. Co.
Clifton Wilhite

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