

A SURVEY OF SELECTED REGIONAL
APPAREL MARKETS PRODUCING
WOMEN'S AND MISSES' APPAREL

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**A SURVEY OF SELECTED REGIONAL APPAREL MARKETS PRODUCING
WOMEN'S AND MISSES' APPAREL**

By

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I. INTRODUCTION

A. PURPOSE

This study of the main regional apparel markets of the United States developed from a combined personal and professional interest of the author in the apparel industry. Although she has not had any practical experience in the industry, it is her desire to work in some aspect of this trade on her return to New Zealand. Because of this, she felt that a study of the garment industry in America, however superficial, would be of considerable value in helping her obtain an overall picture. Several types of statistical surveys were suggested, and considered by the investigator but were rejected on the advice of several people connected with the industry who felt that such information would probably not only be difficult to obtain but also unreliable. The author was advised to make a survey of the regional apparel markets and study their organization and operation in contrast-distinction to the industry in New Zealand. This suggestion was carried out and forms the basis for the investigation and this report. No comparison with the industry in New Zealand has, however, been attempted. On the other hand, the survey of the regional apparel markets was quite extensive, as it was her intention to visit as many of these markets as possible during three months. The scope and limitations of the survey will now be defined.

B. SCOPE

This study was limited to a historical survey of the organization and development of selected regional markets, and the promotional

activities within these individual markets. Because local market associations and related organizations are responsible, to a large extent, for much of the development of the regional markets, it was decided to contact them whenever possible. In the different markets exist schools of design working in close cooperation with the manufacturers, and appearing to set an important trend. The investigation included visiting as many of them as possible.

The following regional markets Chicago, Dallas, St. Louis, Kansas City, Houston, Los Angeles, San Francisco and Cleveland were visited. Time did not permit personal investigation of the Twin Cities, Milwaukee, Boston, Philadelphia, and the Pacific Northwest markets, although they are included in reporting this study. For several reasons no attempt was made to visit the New York market. This market is so extensive and important that it could not possibly have been satisfactorily covered during the short time which would have been available in New York. A survey of the New York market alone would constitute a comprehensive study. Furthermore, there is much more published material available about the New York market than any other. Finally, it is generally considered to be not only the parent market but so much larger and different from the regional markets, that valid comparisons could not be made.

The reader may consider that this survey is too ambitious, and no doubt this is true. Before beginning this investigation, it was realized that a great deal of irrelevant material would be gathered which would be of doubtful value for a thesis, but it was felt that most of it would increase the general knowledge of the investigator concerning the industry.

Perhaps a more detailed study of a single market would have resulted in a report of greater value as a study of that particular market, and perhaps of greater value to the author. However, as this survey was made primarily for personal reasons, it was felt that a general coverage of a number of the more promotionally minded markets would be of greater interest. The investigator felt, that only by visiting the markets she would get any understanding of the characteristics of the different markets, and an appreciation of the many factors which make possible America's unchallenged leadership in mass production of fashion goods.

C. PROCEDURE

Before commencing this investigation, written requests for personal interviews were sent to men and women engaged in the field of fashion in the markets to be visited. Regional directors of the Fashion Group, in every instance, proved to be extremely helpful to the investigator for they arranged other contacts and interviews; and gave abundant information about their particular market, as well as, information on the activities of the Fashion Group as an organization. The author feels deeply indebted to the Fashion Group directors and the many members of this organization who assisted, both directly and indirectly, in the collection of much of the material obtained in this survey and discussed in this report. The publicity directors or executive officers of the local market associations who were previously contacted were likewise cooperative and willing to help in every possible way. In practically every market visited leading manufacturers were contacted through these two groups and personal interviews arranged.

The investigator also carried a number of personal letters of introduction to manufacturers in different markets. Thus it was possible to visit many manufacturing plants and secure interviews with numerous people in the industry whom it would otherwise have been difficult to contact. Arrangements were also made for visiting Schools of Design that work cooperatively with the industry in various markets. Here as elsewhere the investigator was most cordially received.

On actually arriving in the city the market association was generally contacted first, an appointment having been made, in many cases, prior to arrival. Information concerning the work of the association was obtained, news releases, statistical reports and promotional material were given or made available to the investigator. Naturally the amount of material on hand varied with the different markets. The local associations arranged for visits to the leading manufacturing firms in the city. Interviews were generally arranged with executives in different positions within the industry such as production manager, designer, owner or publicity director. Because of this, it was not possible to use predetermined questions or questionnaire and the interview method of investigation was used and proved a satisfactory technique. By using this method the executive told what he thought most significant about his organization and the market. The investigator sometimes failed to get certain desired information. However, this approach did lead to an easier and more informal interview, enabling the author to get more personal reactions, and a feeling of what actually did make that particular market characteristically what it was.

Probably more publicity directors were interviewed than any other type of executive because they necessarily have a general knowledge of the market, and are best informed on promotional activities. The fact that people in different positions in the industry were interviewed was perhaps the most satisfactory approach for this type of investigation, and the author feels that it gave her an insight into the garment industry which could not possibly have been obtained otherwise. Early in the investigation the author was fortunate enough to be conducted through a St. Louis dress factory by the production manager, who explained with considerable detail the production of a garment by modern scientific methods. Others in this market also gave unsparingly, of both time and information, in an attempt to develop the background knowledge of the investigator. Several of these interviews in St. Louis proved to be of great value and the author is indeed grateful for the assistance and encouragement she was given while visiting this market. After covering the St. Louis market she contacted other markets with greater confidence and with a feeling that she had a more fundamental knowledge of the industry.

The time spent in the various markets was very limited, a fact which made it impossible to make use of many opportunities offered for additional interviews et cetera, which would have been of value. It was unfortunate that interviews were frequently timed so closely that they often had to be curtailed in order to keep the next appointment. In every case considerable interest in the project was shown, and many expressed a desire to give further assistance, which might be needed in reporting the study.

Having made this preliminary investigation, it was then necessary to determine what information should be incorporated in the report, for it was neither feasible nor possible to include all aspects the investigation had provided. This report, therefore, constitutes a brief analysis of the women's apparel industry in selected regional markets and includes a review of:

- 1) their development and general organization
- 2) an evaluation of their relative importance to the industry
- 3) a comparison of the character and volume of production in these markets
- 4) promotional activities in the separate markets
- 5) an evaluation of local market associations, trade and fashion publications, retail buyers, and organized fashion and educational groups on market development
- 6) an evaluation of the influence of organized labor on the development and future of the apparel industry.

In an effort to gather more material, especially on markets not visited, the author wrote to many different organizations. Response to these requests for information was satisfactory. Material was obtained from local Chamber of Commerce Associations, Field Service Offices of the United States Department of Commerce, and local market associations in the apparel centers. A great deal of material was obtained from the market issues of Women's Wear Daily, as well as, other trade publications and popular periodicals.

The procedure for this study also included library investigation. Visits to the apparel markets provided information concerning both published and unpublished studies and reports which subsequently proved invaluable. The Research Department of the International Ladies 'Garment Worker's Union, at New York, was most helpful in this respect.

As far as the author is aware no survey of the apparel industry has been made which approaches a study of the markets from a fashion and promotion viewpoint. Most of the studies which have been done are economic or educational in their analysis. The interest shown, and cooperation given by all members of the apparel industry with whom the author came in contact, was most encouraging throughout the investigation. Further studies in the field of apparel production and distribution by Textiles and Clothing majors at graduate level would undoubtedly have beneficial results for the individual, the college, and industry.

II. REVIEW OF LITERATURE

Very few studies have been made which constitute a comprehensive or objective survey of regional apparel markets, either individually or as a group. Comparatively little material has been published which is available to those outside of the trade. One of the reasons for this deficiency of material appears to be the rapid developments in the apparel industry during and since World War II. Throughout this period development and growth of the regional markets was phenomenal. In many instances retailers, consumers, and even some of the manufacturers within a particular market area, have been totally unaware of their market's importance, or stature in the industry. The growth of the regional markets has, however, not been entirely overlooked, and possibilities for their development have been closely studied by individuals and organized groups within the industry. Reports made by such groups are seldom published, but are generally available on request, and are distributed to those within the market who are interested in the development of the industry. In spite of the fact that this is a four and a half billion dollar a year industry, a part of the second largest industry in the United States, there is a surprisingly small amount of published information available. The American public perhaps is unaware of the tremendous growth of the apparel industry during the past fifty years and its significance in the American economy.

Since this report is to be a general account of the development and organization within selected regional apparel markets, as well as

a limited discussion of available statistical data, this review covers a rather wide range of literature. However, there is not a great deal of literature on any single aspect of the industry discussed in this report.

As far as the history and development of the industry as a whole is concerned, there are several excellent sources of information. After all a sufficiently long period of time has elapsed since its beginning for some literature to accumulate. For the New York market the literature available is relatively adequate because this market has been studied quite extensively.¹ The diversification of this market was dramatically revealed in the "The Golden Anniversary of Fashion Week" held in September 1948. Accompanied as it was twice daily by an outstanding fashion parade, it probably was a matter of surprise and pride to many Americans, for achievement in the establishment of such a great industry in a relatively short period of fifty years. The Official Jubilee Program² with its interesting account of the history and development of the New York apparel market must have made millions of Americans, as well as the author, more aware of its scope and prestige than they had ever been before. As a foreign student who had but recently visited numerous regional markets this spectacular event was most impressive.

1 Brew, Margaret L., American Clothing Consumption, 1897-1909, University of Chicago, 1944 (Unpublished Ph.D. dissertation). Crawford, Morris de Camp, The Ways of Fashion, New York, Fairchild Publication, 1948.
Nystrom, Paul, Economics of Fashion, New York, The Ronald Press, 1928.

2 Golden Anniversary of Fashion, New York, Official Publication of Mayor's Committee, 1948.

Closely allied with the growth of the garment industry in New York is the history of the International Ladies' Garment Workers' Union.¹ Some outstanding books have been published about the early struggles of the workers, and the reforms which have produced the industry of today. The Women's Garment Workers by Louis Levine is a history of the ILGWU¹, the story of--

".....The struggle of an industrial group, once economically weak and neglected, for the recognition of its rights and for the humanisation of the conditions under which it works and lives. It is one of the most poignant and dramatic chapters in the general story of the movement of American labor for higher life."²

This book relates the life of the garment workers, from the early "sweatshop" days, through the struggles of the union from 1900 to 1909, and developments since 1910. It is both the history of the union and the garment industry. Without the union there could have been no history of the garment industry, for its record of achievements--higher wages, reduced working hours, improved conditions, and persistent and far-sighted social and economic planning have made it possible for the worker to participate in shaping the direction the industry has followed.

Two other books, written for the ILGWU, are today considered classics in their field. The Needle Trades, by Joel Siedman³, similarly to Levine's book traces the rise of the garment workers and the development of the Union.

1 The International Ladies' Garment Workers' Union. It will hereafter be written as ILGWU.

2 Levine, Louis, The Women's Garment Workers, New York, B. W. Huebsch, 1924, p. vii.

3 Siedman, Joel, The Needle Trades, New York, Farrar & Rinehart, 1942.

The Tailor's Progress, by Benjamin Stolberg¹, is still another story of the union and the men who helped in its foundation and development to 1940.

Various pamphlets were published by the ILGWU in an attempt to publicize the union and also to make people more aware of the garment industry.² Surveys of the regional markets are made from time to time by the union in an attempt to learn how production may be improved and the volume output of the market increased. However, these reports have not been published. Several economic surveys of the garment industry have been carried out by union officials, and some exist in published form.³

Dresses, The Impact of Fashion on a Business by Helen Everett Meiklejohn⁴ has been reprinted by the ILGWU for distribution among its members because of its excellence. The article approaches the field from the economic angle, but it also covers several other aspects of the garment industry. It gives not only an excellent picture of conditions in the industry from its origin, but discusses fashion problems in relation to clothing manufacture at all levels, from designing to its ultimate distribution at retail.

1 Stolberg, Benjamin, Tailor's Progress, New York, Doubleday, Doran and Company, 1944.

2 See bibliography as listed under ILGWU Publications.

3 Among these are: Teper, Lazare, The Women's Garment Industry New York, Education Department, ILGWU, 1937; Daniels, W. Trends and Prospects, New York, Education Department, ILGWU, 1947.

4 Meiklejohn, Helen Everett, Dresses, The Impact of Fashion on a Business. Reprinted from Price and Price Policies by Walton Hamilton and Associates. New York, McGraw-Hill, 1938.

An interesting survey of the New York clothing industry is the monograph Regional Plan of New York and its Environs, an Economic and Industrial Survey, by Selekman and others.¹ This report, made in 1925, is still considered valuable, although the garment industry in New York has, of course, changed considerably in the intervening twenty-five years. It covers not only the women's garment industry but also the men's wear and textile industries, and was one of nine industrial surveys made primarily for professional city planning. This particular survey aimed to serve the textile and clothing industries, as the facts brought out regarding trends in the industry would aid in arriving at sound decisions on factory location. This monograph gives a very detailed picture of the clothing industry in New York, and manufacturers' location trends within the city, particularly the tendency towards decentralization.

A very similar report was made by Mabel A. McGee. Her paper, Trends of Location in the Women's Clothing Industry², was based on the former monograph, but covers the trends in location in the Chicago industry.

A number of special market surveys have been made, but these are mainly economic in their approach, or designed for educational or vocational purposes. As most of these were written before 1939, they are not a source for a great deal of information for this particular report, although some do contain facts of interest and pertinence.

1 Selekman, B. M., Walter, H. R., Couper, W. J., The Clothing and Textile Industries in New York and its Environs. New York. 1925.

2 McGee, Mabel A., Trends of Location in the Women's Clothing Industry, Chicago, University of Chicago Press, 1930.

The organization within the markets has changed considerably since their publication, but they do provide a foundation on which to trace the developments which have taken place over the past ten years. More recent reports, however, are of infinitely greater value.

The Vocation Bureau, Cincinnati Public Schools, made a report on the clothing industry in that city in 1924.¹ This was an occupational study for school children. The Clothing Industry in Cleveland, a report written by Mildred M. Hickman, in 1938, was also an occupational study for teachers, placement officers and others interested in correlating school curricula with industry's needs.² In San Francisco, a report for a similar purpose was made in A Survey of the Garment Trades in San Francisco, by Emily Palmer³, for both the vocational education department and the industry. The object of this survey was to study the economic importance of the industry to the city, and to determine the educational requirements and teachable aspects of the trade. Labor supply was insufficient at this time, so an attempt was also made to determine whether wages and working conditions would justify encouraging and training workers for the industry.

The Economic Aspects of the Production of Men's Clothing, by Robert James Myers⁴, refers particularly to the Chicago market. Although

1 The Garment Industry in Cincinnati, The Vocation Bureau, Cincinnati Public Schools, 1924.

2 Hickman, Mildred M., The Clothing Industry in Cleveland, Cleveland Board of Education, 1938.

3 Palmer, Emily G., Survey of the Garment Trades in San Francisco, Berkeley, University of California, 1921.

4 Myers, Robert James, The Economic Aspects of the Production of Men's Clothing, (With particular reference to the industry in Chicago), Chicago, University of Chicago Libraries, 1937.

dealing with aspects in the men's wear industry, this dissertation contains valuable material. The Feasibility of Expansion of Clothing Manufacturing in Kansas¹ is a recent publication which aims to present economic reasons for the establishment of garment factories in different parts of the state. Other surveys have been made by both the local Chamber of Commerce Associations and local manufacturers associations. In several cases the reports have been distributed to manufacturers throughout the nation, in an attempt to interest them in locating their factories in certain cities. New Orleans and El Paso are two cities which have done this. Other reports have been prepared by the United States Department of Commerce and local market associations. All are available on request; some providing valuable information for the present report. There are undoubtedly similar investigations which have been carried out recently, but they are not yet published and available. An extensive economic survey, published in 1947, includes a chapter "Clothing, Accessories and Personal Care"² which analyzes clothing consumption and trends. It is recommended as a valuable analysis of changes in apparel consumption and factors influencing those changes.

A study was made, in 1943, of the St. Louis market by Blanche Gross. The Awakening of an Industry³ discusses the position of the market

1 Mollett, Clarence M., The Feasibility of Expansion of Clothing Manufacturing in Kansas, Lawrence, Kansas, University of Kansas Publications, 1948.

2 J. Frederic Dewhurst and Associates, Clothing, Accessories and Personal Care, in America's Needs and Resources, New York Twentieth Century Fund, 1947.

3 Gross, Blanche, The Awakening of an Industry, unpublished thesis, School of Business, Columbia University, New York, 1943.

before 1930, and changes which caused its conversion to the production of junior apparel. Special features which have helped to make this one of the most progressive markets in the country are also discussed. Miss Gross's father has been, for many years, president of the Associated Garment Industries of St. Louis, a manufacturers' association. As a result the author possessed first hand knowledge of conditions in this market.

An interesting report on the local market associations of Dallas, St. Louis, The Twin Cities, and Kansas City, was presented to the Wisconsin manufacturers by the Milwaukee Journal¹. This local newspaper, working with a small group of progressive manufacturers, made an extensive survey of the leading regional apparel markets. Mainly the promotional activities and outcomes were studied. The Milwaukee Journal spent several months on this research, actually sending reporters into the different markets to interview people vitally interested in that particular market. The study pointed up the diversification of the Wisconsin apparel industries and proposed a plan for the unification of these industries as a fashion market. No other similar report has been found, although several have probably been made as the different markets have organized their promotional activities. Such surveys often were carried out with the assistance of the Fairchild Publications, which are so intimately informed about individual apparel markets throughout the United States.

1 The Milwaukee Journal, A Proposal for the Development of a Milwaukee and Wisconsin Fashion Market, 1945.

Women's Wear Daily¹ which has for many years made an invaluable contribution to the industry, has been an excellent source of historical and current information for this study. This daily publication for the retail trade, does an outstanding day-by-day coverage of all phases of the clothing and textile industries. A file of these publications, from January 1942 to date, was available in the Michigan State College Library. These papers have been perused for information relevant to this investigation; particularly the promotional sections for the individual apparel markets. In these sections are to be found comprehensive accounts of the early history of a market, its development, promotional activities, labor conditions in the market, and often biographical notes on manufacturers. The local market associations, as well as the manufacturers, annually buy many pages of advertising in this publication. The amount of editorial space given in the market sections is determined by the total advertising space bought by the market. The number of issues in which any given market is featured annually is determined by the promotional program of that particular market.

An outstanding annual publication, first issued in 1947, is Apparel Markets.² This periodical has proved most valuable for this paper, since to the knowledge of the author, no similar or as comprehensive an analysis of the markets has been published. These publications fill a very definite need in current literature on the apparel industry. Apparel Markets may be called a market data book for the

1 Women's Wear Daily, New York, Fairchild Publication.

2 Apparel Markets, New York, Kogus Publishing Company, 1947, 1948.

industry. It is considered by members of the trade to be the most helpful year book for the apparel industry ever published. All apparel markets in the United States are discussed; in fact, it may be regarded as an encyclopedia; for it deals with the history of the city and the market, the industries and apparel manufacturing, apparel associations and retailers, statistical and other pertinent information relative to the respective markets. The third edition of this periodical will be published in March, 1949. The first two issues differ. The first provides historical and statistical information which the publishers feel are reasonably accurate, being the data resulting from exhaustive investigation, analysis and reappraisal. The 1948 issue contains reports prepared by an executive officer from a leading local market organization. This material, in the opinion of the editors, is not always accurate or objective as each executive is tempted to emphasize the prestige of his market. This publication is unique in its field as the complete data it offers are not available in any other book or periodical. It is most effectively compiled. In 1947 this publication was awarded first prize for editorial achievement in merchandising and the best annual research publication. Both issues have served as a valuable source of current information. They are recommended to anyone interested in the clothing industry. The Kogus Publishing Company, responsible for Apparel Markets is well equipped for its task, since for many years it has published Apparel Manufacturer, a monthly magazine for the men's wear trade, and the Supplier's Register, a national directory of supplies.

Other statistical studies on the apparel industry have also been available. The Market Planning Service, a division of the National Credit Office Inc.,¹ is a non-profit organization which has, for several years, issued a series of booklets on the apparel industry. Annually, they compile statistical data on production and distribution in the different regional markets. Their data are valued although some critics within the industry feel that they are not entirely reliable, but do provide an excellent basis for comparison of the different markets. This office offers a continuous service to the industries it serves so that it is possible to obtain past and current reports.

Comprehensive and more reliable statistical reports are made approximately every ten years, by the United States Bureau of Census.² The last available Manufacturers Census, the Sixteenth Census, was made in 1939. The next census since was made in 1947. Unfortunately, the reports from this census are not available for inclusion in this paper. A comparison of the different apparel markets in the years 1939 and 1947, would add considerably to the value of this report. Another statistical analysis issued by the United States Department of Commerce are the Facts for Industry Series,³ quarterly publications on production within the different industries. Production figures by type of garment, manufacturing centers and price ranges are covered in these reports.

- 1 The Dress Industry, New York, Market Planning Service, A division of National Credit Office, Inc., 1947.
Women's Coat and Suit Industry, Market Planning Service, A division of National Credit Office, Inc., 1946; 1948 supplement.
- 2 Sixteenth Census of the United States, Manufacturers, Vol. II, Pt. I, 1939, U. S. Department of Commerce, Washington, D. C.
- 3 Facts for Industry, Bureau of the Census, Department of Commerce, Washington, D. C.

Because this report is a current one, other sources of information include business and trade periodicals. Sales Management, Business Week, Survey of Current Business, and others¹ have been used. Although these periodicals do not give a general survey of the different markets they do present current news about developments and problems confronting the garment industry. Several times a year Fortune² contains outstanding reports on some aspects of the apparel or textile industry. Articles have been written on the ILGWU, Seventh Avenue, the Los Angeles Market, American designers, and other feature articles of significant interest to industry and business. Considerable research goes into the preparation of articles published in this outstanding American periodical. Other periodicals such as Colliers, The Saturday Evening Post, Life³ and others, also publish feature articles about the industry or some specific apparel market or firm. Such articles are primarily of consumer interest, but they too have served as an additional source of information. It is often in such articles that the most recent information is to be obtained.

Before completing this review of literature, it is important to say something of the contribution Mabel Disher, has made to the garment industry with her recent book, American Factory Production of Women's Clothing.⁴ This book, written by an Englishwoman after extensive study of the women's apparel industry in the United States and Canada, is

1 For some specific articles see bibliography.

2 See bibliography.

3 For specific articles see bibliography.

4 Disher, Mabel, American Factory Production of Women's Clothing, London, Devereaux Publications, 1947.

considered by those in the industry as the most outstanding work yet published in this field. It consists mainly of discussions of production methods, factory equipment and industrial engineering techniques, although some other general aspects are also considered. It has not been used a great deal for this particular study because of its more technical approach, but it is to be highly recommended to all interested in any branch of apparel manufacturing. Acknowledgment of the value of this publication to the industry was summarized in the following statement made by a member of the Research Department of the ILGWU: "We are ashamed to admit that this book has been written by an Englishwoman." Miss Disher, who had several years experience in industry in England before coming to America to do this research, is vitally interested in the future of the garment industry, and expresses the desire that her work will encourage further research in all branches of the industry.

Undoubtedly there is much additional material on the apparel industry which has not been published. If this could be collected and edited, it would make a further contribution to a field inadequately supplied with literature.

III. REVIEW OF THE APPAREL INDUSTRY

A. ORGANIZATION OF INDUSTRY

Before commencing a discussion of the dress industry in the apparel markets of the United States, it is necessary to state what is generally understood by the term, "apparel industry". Also briefly discussed will be the sub-divisions and the general organization of the industry, and the different methods of production currently being used.

The 1939 census report describes the apparel industry, one of the country's largest and most vital industries, as follows:

"The cutting-up industries or needle trades produce clothing and other fabricated articles from purchased woven or knitted fabrics. All types of textiles are utilized, as well as leather, rubber, fur and other materials. Custom tailors and dressmakers, not apparently on a factory basis, are excluded from the scope of these industries. A substantial number of establishments in these industries work on a contract basis from materials owned by others. The manufacturer or jobber owns the materials, assigns the piece goods to a contract factory for fabrication, and sells the finished product."¹

The apparel industry may be broken down into many component parts, the first division being into the men's wear industry and the women's garment industry. These, in turn, are divided into various branches.

As only certain phases of the women's garment industry is to be discussed in this report, the description and breakdown of the component parts of the men's wear industry is not given. Women's wear is divided into several sections, the chief of these being women's and misses' outer apparel, which are further subdivided. It is perhaps of interest to cite again from the 1939 census the description of these separate industries

1 Sixteenth Census of the United States, op. cit. p. 396

in the women's and misses' outer clothing section in so far as they are pertinent to this paper:

....."Women's and misses' blouses and waists--made in inside factories, or by jobbers engaging contractors.--This industry, as constituted for census purposes embraces those establishments primarily engaged in the production for sale from their own materials, of women's and misses' blouses and waists.

"Women's and misses' blouses and waists--made in contract factories.--This industry embraces those establishments primarily engaged in the production on a contract basis, of women's and misses' blouses and waists from material owned by others.

"Women's and misses' dress (except house dresses)--made in inside factories or by jobbers engaging contractors.--Establishments classified in this industry embrace those primarily engaged in the production, for sale from their own materials, of silk, rayon, wool and cotton; dresses, made to sell by the piece and to retail above two dollars. Ensemble dresses of all materials are included in this industry. The manufacturer of house dresses to sell by the dozen and to retail for less than two dollars each are included in the industry 'House dresses, uniforms and aprons.'

"Women's and misses' dresses (except house dresses)--made in contract factories.--This industry embraces those establishments primarily engaged in the production on a contract basis from materials owned by others, of women's and misses' dresses from materials of silk, rayon, wool and cotton described for the regular factories above.

"House dresses, uniforms and aprons--made in inside factories or by jobbers engaging contractors.--Those establishments primarily engaged in the production for sale from their own materials, of house dresses chiefly of cotton fabric made to sell by the dozen and to retail under two dollars each, and in the production of nurses and maid's uniforms, aprons, smocks and hooovers are embraced by this industry.

"House dresses, uniforms and aprons made in contract shops. As constituted for census purposes this industry embraces those establishments primarily engaged in the production, on a contract basis from materials owned by others, of house dresses described above and nurses uniforms, aprons, smocks and hooovers."¹.....

It is extremely probable that the next census report, due to be published about the middle of 1949, will give slightly different definitions

1 *ibid.*, p. 431.

of these industries, because of the recent technical developments in the garment and textile industries. Many new fabrics must now be included in the types being used by both the dress and the house dress industry. Because of these changes and the effect of the war, it is difficult to differentiate clearly between the two industries. These two industries have become so closely intermingled that the dress industry, to the general consumer, covers the entire range of women's dresses and house dresses. Most manufacturers make several different types of garments, generally with dresses predominating, so it is often difficult to differentiate manufacturers of dresses from those of other types of apparel. The development of sportswear has further complicated this situation as many street dresses are sold under this category.

Helen Meiklejohn describes the dress industry in the following manner:

"The dress industry, as commonly defined, has as its chief product a one-piece dress for women, misses and juniors; but it is also responsible for the production of blouses, skirts, ensembles, and even such outer garments as are worn with afternoon and evening gowns, thus overlapping to a certain extent the cloak and suit trade. It does not include the "house dress" or the cotton wash dress made by the house dress industry. What might be termed an 'industrial fault line' separates the "dress industry proper" or the silk dress industry from the making of house dresses. The line is not clear-cut; but they are not actually two separate industries. Yet they may be differentiated, as they were by the National Industrial Recovery Act, under which there was a "dress manufacturing code" and a "cotton garment code", the latter including the manufacturers of the cheap house dress. Like most definitions, this one has been arrived at by the rough logic of working arrangements rather than by a priori considerations.

"The house dress has a lowly origin and was the last to leave home and submit to factory production. It is descended from 'the wrapper', or Mother Hubbard, which women donned in the morning and wore until the housework was done. Some years ago it appeared

that meals could be cooked and dishes washed in a dress suitable to the task, yet not bearing the special imprint of housework. The style of the house dress improved so greatly that it can now appear on the street, and at its best moments is quite indistinguishable from the dress made by the low-priced firms of the dress industry. The product of the two industries cannot always, therefore, be differentiated by style, though practicality is the dominant note of the house dress. Nor can they be designated by the material used, because house-dress manufacturers, though nine-tenths of their dresses are cotton, work also with silk, rayon, and jersey at certain times of the year. Despite these resemblances, the house-dress industry has distinguishing characteristics--a more highly mechanized production, a scattered location of its plants with four-fifths of them in small communities, a steadier and less seasonal demand for its product involving relatively low risk, a more unskilled type of work, and an absence of labor organization."¹

From these descriptions it may be seen that in covering only the dress industry apparently but a small part of the garment industry is being discussed. However, the dress trade is today the leading branch of the apparel industry, with the coat and suit industry following far behind in volume importance. Indeed, dresses account for almost fifty percent of volume production in the women's apparel industry.

B. METHODS OF PRODUCTION

It will be of interest to the reader to have some understanding of the production methods used today, because these have changed considerably since the early days in the industry. The very first methods used for the manufacture of clothing was either by contractors employing journeymen tailors during their off-season, or by sending garment pieces to the homes of women workers. In the beginning, the entire garment was made by one worker; and this required skilled labor, at this time in sufficient supply. With an increased demand for clothing at the time of the

¹ Meiklejohn, H., op. cit. p. 301-302.

Civil War and the greater ease of manufacture due to the invention of the sewing machine, more unskilled labor was employed. At first the "family" system was introduced by the German contractors who employed the women of the family for the sewing. This was responsible for the later introduction of women into the industry, almost to the exclusion of men. The "task" system soon developed under the Jewish contractors and with it some of the greatest evils in the history of the apparel industry.

"The industry became infested with hordes of contractors, sub-contractors and jobbers -- commercial parasites who kept the trade in a state of demoralization."¹

Most of the early manufacturers were German Jews, who gradually built up their businesses between 1860 and 1880. At first manufacturing plants were relatively large and employed several hundred workers. These factories later came to be known as "inside shops", many still remaining in business at the present time. In such factories the clothing manufacturer purchased his own materials and supplies, and planned the production and distribution of the finished product after its manufacture in his own factories. The other system which has also existed in the industry since this time is the "outside shop" where garments are made by the contractor or sub-contractor for the jobber who supplies the materials and designs. These "outside shops" greatly increased in the late 1890's until the trend to decentralize altered it to a certain extent. In New York the system grew rapidly. Contracting houses were smaller than "inside shops", especially in New York where often no more than thirty machines were operated. Today manufacturers frequently own

1 Stolberg, op. cit., p. 3.

factories and employ one or more contractors either permanently or at seasonal peak periods. In some markets contracting does not exist and this is said to give stability to the market. In New York, there are union laws restricting the number of contractors who may be employed by a manufacturer; an attempt to overcome some evils of the system so prevalent in the early years of the industry.

This contracting system is responsible for much of the aversion on part of native born Americans to enter the needle trades. Immigrant labor prior to 1900 preferred to live and work as a national group and thereby became entangled in what became known as the "sweatshop" system. Such workers were most unskilled and were called, by their skilled countrymen, "Columbus tailors", meaning that they had just discovered America and the art of tailoring.¹ These "Columbus tailors" usually worked under the "task" system. The "task" system broke down the manufacture of the garment into several parts; basically the baster, operator and finisher. The contractor found this method was extremely profitable because it enabled him to exploit the worker.

In 1895 the "Boston system" was originated. In this method, very different from that previously discussed, each step in the construction of the garment was separated, and the operators were trained for one special and relatively small operation. This made possible the use of a great deal of unskilled female labor. The machine operators under this method became so efficient that the baster was no longer required. Unless larger numbers of people were employed, this method was found to be fairly ineffective, as the breakdown in the construction of the

1 *ibid.*, p. 7.

garment was often as many as 150 or more separate operations. This method, with certain modifications, has carried down through the years to become to be known as the "bundle system".

Today there are three main systems¹ used in the actual construction processes in dress manufacture. These are: 1. the "bundle" system, 2. the "straight-line" system, and 3. "progressive bundle" system.

The bundle system was perhaps the most prevalent since it has been in existence in a somewhat modified form since the beginnings of the industry. However, during World War II, straight-line production came into fairly prominent use, especially in the Mid-western factories working on large war contracts. The progressive bundle system is used a great deal today, as it is somewhat more adaptable than the straight-line method of production.

1. Bundle system:

In the bundle system the separate parts of the garment, after cutting are sub-divided into smaller piles of convenient size, each being tied into a bundle. These are distributed in the sewing room and passed from operator to operator in the course of the construction of the garment. Bundles are generally collected from the operators when they are finished. Occasionally the operator collects and returns them herself. This method has the advantage of a rest period and the fatigue

1 More detailed explanations of these methods of production may be found in Disher, M. L., op. cit., pp. 10-27, and "Production Planning and Control", pp. 28-60. "Systems of Shop Management in the Cotton Garment Industry", Monthly Labor Review, Washington, D. C., U. S. Department of Labor, June 1938, pp. 1299-1320.

of the workers is not as great as is found in factories using the straight line system. In the bundle system, the garment is subdivided into many parts, often more minutely than is necessary for the straight-line method.

2. Straight-line System:

The straight-line system, about which there is so much discussion today, originated in 1932 and was patented two years later. It was not generally used before 1942. It was first developed in a plant in Indiana. This method differs in a number of ways from the more familiar bundle system. A single part of the garment becomes the unit of work, although the final unit is the garment as in the complete garment method. The straight-line system requires a radical rearrangement of machines from the long straight rows used in most factories to short rows of one to three or four each, so that there is direct progress between the consecutive operators. The work for this method is broken down into the minutest subdivisions of operation so that greater speed is more readily attained by the operator, and less skill is required by the learner. This method demands careful time studies before a new style goes into production, so the correct number of operators may be assigned to each section of work and there is no delay in production. The garment must move in correct sequence and without hindrance from one operator to the next. The operator moves the finished work via automatic feed to the next operator who does not have to wait for the completion of the bundle. This process continues the length of the line until the garment is finished. Not all parts can be constructed on the line, as this slows

production; such sections are sewn off the line and supplied to the operators as needed. This method of production is especially adaptable to standardized types of clothing.

This method eliminates a great deal of handling and saves time for both management and labor in as much as the greatest amount of time is required in the bundling process. All handling operations, however, are not eliminated, although they are reduced to a minimum. The process in the straight-line system is easier for the operator and the distance the garment travels during its construction is considerably shortened. This means a great saving of time which is essential in a method such as this.

3. The Progressive Bundle System:

This system, which has been recently developed, is a modification of the straight-line system. It follows the same progression except that the bundle again becomes the unit of work, instead of the single garment or part of the garment. This type of production is more flexible and adaptable to style changes. It has borrowed many ideas from the line system, the chief one being the elimination of the foreman or his assistants handling the work. Machines are arranged in a logical sequence to permit this. In the straight-line system, which uses the single garment as the unit of production, any major or minor deviation from the plan has a paralyzing effect on production. Management has to be constantly on the alert to prevent interruptions in production, either through a breakdown of machinery or the inefficiency of any operator. The worker must at all times work at top speed in order to keep

the line moving in the progressive bundle system. The bundle system, on the other hand, lacks this incentive as in this method the bundle is handled by one operator until it is completed. The only real advantage of the progressive system over the older bundle system is that it saves management's time in handling bundles. This method is used by many well-known factories in the Mid-west and on the West Coast.

Under the bundle method wages are paid on a piece rate basis. In the straight-line system, all workers on the line produce the same number of garments so the operators are paid on an hourly basis but at different rates for different types of work. A bonus is generally paid if more than the standard number of dresses is produced in the day.

C. Steps in the Manufacture of a Garment

So far only the types of production methods used have been discussed. Nothing has been said of the actual processes through which a garment passes in its manufacture. No matter how small the factory, the following operations, with slight variations, are general in the industry.

The current line of garments is created by the designer, who generally works in the factory. In apparel markets close to New York, the designer frequently works in New York. Many more designs than are ultimately shown in the line are created by the designer, as not all designs are sufficiently good, or practical, for production purposes. Very often, many of these designs are copies of better dresses, or couturier designs which are adaptable to cheaper methods of production. From the designs submitted by the designer, the manufacturers, often with the advice of the fashion coordinator, choose the styles which are to make up the current line. These styles are then constructed by the sample maker, who

generally makes the entire garment. There are some factories especially in the Mid-west where the salesman's samples are made under regular factory methods, and methods of production and time studies are worked out for that particular garment. The pattern maker makes and grades the pattern for the different sizes required from the original sample.

Before actually going into production, every garment is carefully analyzed as to cost of production, and ways by which a similar effect could be more simply produced for mass production with the use of a minimum amount of fabric. The aim is always to simplify the pattern as much as possible. Some firms will encourage operators to suggest ways in which they feel the production could be made easier and more rapid. Often suggestions will come from the pattern cutting department for the adaptation of a machine which can be adjusted to a specific manufacturing process. This simplification and breakdown of the designer's sample is essential as these are created for effect rather than production. In planning how a pattern may most satisfactorily be made, the pattern department frequently aids the production department, since it estimates yardage and recommends sizing and the most economical method of laying the pattern for cutting. Often they recommend a style be dropped, if there is no way by which the yardage may be reduced satisfactorily. Basic patterns used for the grading and making of the patterns are revised each season. After the patterns are made a sample frock is constructed and checked with the original by the designer. The sample garment is then sent to the production department.

In the production department the final analysis of the cost of production is made. The garment is broken down into its component

operation steps and costed as to labor, fabric, findings, overhead, etcetera. If the production cost of the garment meets the requirements for its particular price range, it will go into production. If not within the required price range, the garment is altered if desirable and possible, or is dropped from the line. No manufacturer will include in his line a dress which does not fall within his usual price line, as it will not sell. This costing of garments down to the last detail developed during the war, when government regulations made it essential. Today, manufacturers continue this costing and production analysis as they find it an invaluable asset in production efficiency. It removes some of the risk from the erratic dress industry.

Once the garment has been passed by the production department, an operational analysis is carried out, and it then goes into production. The manufacturing processes are briefly listed in the following paragraphs.

The fabric is laid out by a cloth laying machine on long tables which often run the entire length of the factory. The fabric is piled many layers high, ranging from one hundred to two hundred or more depending on the fabric used. Colors alternate, or for plain fabrics a layer of tissue paper is placed between the fabric lengths.

The marker is placed on top of the lay, and the pattern pieces expertly cut by the operator with an electric cutting knife. The different pattern pieces are tied in bundles, and every piece of the garment is stapled with a card giving the style number, size, lay, etc. This is an essential safeguard against pieces of different lays being sewn together, as frequently the different bolts of fabric show slight

variations in color. A perforated card with a section for each manufacturing operation is attached to the bundle, each operator tearing off the appropriate section when she has completed her particular step in the manufacture of the dress.

The garment then goes into production. If the operator constructs the entire garment, the work is distributed with all garment pieces bundled together. More generally, in the regional markets, large section bundles are divided into smaller ones and distributed as such to the operators. One of the methods of production previously described is used in the construction of the garment.

After the garments have been constructed, they pass to the finishing department, where the hems are sewn, and buttons, hooks, eyes and other trimmings are attached. Some of these operations are performed by special machines, while others are finished by hand. All loose ends of thread are removed. The garment then passes to the pressing department and afterwards to the examining department. Here it is carefully checked for faults in construction, finish, or general appearance, being returned to the operator responsible if there is any defect. The garment finally passes to the shipping department where orders are assembled and dispatched.

Some manufacturers who own several factories in different locations make a genuine effort to obtain standard quality in production. This is, of course, difficult, but various ways have been devised to overcome this necessary disadvantage which developed with the use of contractors and decentralization of operations within the industry. If the manufacturer

makes several different types of garments such as skirts, slacks and jackets, a single garment may be made in its entirety in one of the manufacturing units. In other factories, random samples are brought in from a central department for checking quality of workmanship. A very rigid check is made for size, fit, finish, workmanship, use of correct trimming and other points. No garment goes into production, before the first samples have been thoroughly examined and passed by the production staff.

Some firms have various laboratory tests carried out on the fabrics used in their garments. Labels are supplied for the finished garments only, if the information has been certified by these tests.

This then is a brief summary of the processes through which a garment passes in manufacture and something about the methods used in its production. Job descriptions of the many processes involved, and a discussion of many types of machines used, might clarify certain operations; but the scope of this paper does not permit. The author would refer the reader for further information on these subjects to the following: American Production of Women's Clothing¹, and Job Descriptions for the Garment Industry.²

1 Disher, M. L., op. cit.

2 The Job Analysis and Information Section, Division of Standards and Research, Job Descriptions for the Garment Manufacturing Industry, Washington, D. C., U. S. Government Printing Office, 1941.

IV. HISTORY OF THE AMERICAN CLOTHING INDUSTRY

A. ORIGIN AND EARLY DEVELOPMENT OF THE INDUSTRY

A brief survey of the early development and history of the garment industry in America is relevant to this study. In as much as there is a relatively large amount of material available to the student, only a brief summary is to be included. M. D. Crawford, in his book, The Ways of Fashion¹, divides the history of the ready-to-wear industry into three periods: the American pioneer period, which begins with colonial times and ends with the rise of the German-Jewish control about 1880; the industrial factory era of tailored garments, a period of the last twenty years of the nineteenth century; and the period of the Russian and Polish Jew and the Italian, beginning about 1890 with the "sweatshop" to the amazing development of Seventh Avenue. A fourth period could easily be added which traces the development of the increasingly important regional markets in the past twenty-five years. More or less following these chronological divisions, a brief history of the industry follows.

During the early period of garment manufacturing in America, clothing was generally made in the homes by the women in the family or by itinerant tailors or dressmakers. Before the American Revolution, all better clothing was imported, first from London, but later directly from Paris. Due to the comparative enormous wealth in the United States between the years 1812 and 1830, a fashion interest began to develop. In 1820 the garment industry was first considered important enough to be mentioned in the census of that year, even though at this time it

1 Crawford, op. cit., p. 89-128.

was still a hand craft. It was not until the invention of the sewing machine by Elias Howe, in the early 1850's, that the garment industry showed any signs of developing into the tremendous industry it is today. This development led to further breakdown and specialization in production, which made possible both cheaper and increased production. This meant the ready-to-wear industry could be brought to a price which could compete with the second hand clothing trade which had sprung up at this time. Quoting from the comprehensive discussion by Brew:

"The advent of the sewing machine had a far reaching effect on the apparel industry so that today it is all but impossible to assess its true value to the world. It made possible the production of clothing in larger quantities than anything previously known so that it reduced the disparity in the clothing of the rich and the poor, and this made possible a general rise in the level of living. There was a greater growth or rate of progress in mens' wear than women's due, no doubt, to the greater uniformity of style."¹

Here indeed is the secret of the growth of the garment industry. Since the invention of the sewing machine there have been many improvements and developments, not only in the sewing machine itself, but also in special machines which increase and improve production. Many firms today use machines adapted to special purposes by their own mechanics to meet their own particular requirements. The invention of the electrical cutting knife at the end of the nineteenth century and later the mechanization of pressing processes greatly affected production methods. Since these three basic developments, mechanical developments have been mainly in refinement of machinery for increased efficiency in production.

1 Brew, op. cit., p. 123.

Between 1825 and 1830 the first factories began manufacturing men's wear, for sailors putting into the eastern sea-ports. These factories which sprang up in New Bedford and Boston, were not factories in the true sense of the word, as the work was generally completed by women in their own homes. This clothing was generally of very poor quality and came to be known as "slops". In spite of the poor way in which these garments were made and sized, they met with definite success, and gradually garment factories were established in towns along the coast. Two other factors also contributed to the growth of the ready-to-wear industry. Simple clothing had to be supplied for the negro help in the South, as the plantation owners found that their time could be used to better advantage than in making clothing. This trade with the South led to the development of the shirt industry, as the planters would invariably enclose an order for several shirts for themselves which instead of being custom made, as expected, were manufactured. However, they were made considerably better than the cheap clothing supplied for the negro workers. This trade soon developed into a thriving industry which continued to grow between the years 1840 to 1861. Manufacturers in Memphis, New Orleans, Cincinnati, and St. Louis absorbed most of this trade. The general trend westward likewise had a tremendous effect on the garment industry. This movement was stimulated by the discovery of gold in California in 1849. This demand was constant, for there was a long period when there were no women on the west coast to make clothing; so the miners had to have either second hand or ready made clothing.

The Civil War of 1860 to 1865 caused even more extensive developments in the industry, as during this time there was a great demand for uniforms, and after the war civilian demand added further stimulus. During the Civil War thousands of measurements were taken and compiled, so that sizing became more standardized, and production more efficient. Industrial development was, however, inhibited by the depression in 1873, causing many failures in the industry. Garments manufactured were still poor in quality, although the depression did bring about some improvement. Other depressions have had a similar effect.

The nineteenth century saw the development of a great middle class, especially in the United States. This, and the rise of the white collar workers, and increased social life created a desire for low cost clothing with a good appearance. At the same time many thousands of Europeans immigrating to the United States also increased the demand for cheap clothing. Transportation and communications improved in America and many new industries and professions sprang up. All these factors had a great influence on the ready-to-wear industry with the greatest development taking place between the years 1860 and 1880.¹

It was in the 1870's that the first garment factories began to spring up in the Mid-west, the most important of these markets being Chicago. Markets were also operating in Philadelphia, Baltimore, Cleveland and Cincinnati. Markets gradually appeared west and south of Chicago in rural areas, which, at this time, were frontiers for the newly opened western states.

1 Brew, op. cit.

The women's garment industry, beginning with the foundation of the coat and suit industry, was first recognized as a growing industry in 1840, when cloaks and mantillas were being manufactured in considerable quantity to meet the greatly increased demand. Twenty years later, the census lists 188 manufacturers, 5,379 workers, and a total volume production of \$7,181,039. Most of these factories were located in Boston and New York.¹

By this time the main part of the women's garment industry was engaged in the covering of hoop skirts. Factories at this time resembled steel works rather than a garment factory. There was not a great deal of growth in the industry before 1880 to 1900 when coats and suits began to develop into an important factor. By 1895 dresses and shirt-waists were beginning to be made in the factories, and within the next twenty-five years had become an important branch of the industry. This industry really grew out of the wrapper and wash dress industry, which began at the turn of the century.

World War I had a marked influence on women's clothing. Women's activities increased, resulting in increased demand for ready-to-wear. Manufacturing was necessarily greatly curtailed during the war years, but in the following years factories were flooded with orders, as wages were high and there was free spending. Sales soared to volumes not previously imagined possible. As is always the situation in such cases, there was a rapid rise in prices but as production exceeded demand the industry found itself with too many manufacturers. This was the first real setback received by the industry since its inception. Mary

1 Taper, L., op. cit. p. 10.

manufacturing firms went out of business and were not, as in normal times, replaced by new and ambitious manufacturers.

It was the designing of the one piece dress by Vionnet, the Parisian designer, in 1918, which gave greatest impetus to the American dress industry. Indeed, it may almost be said to have created the dress industry overnight. The simplicity of this garment greatly facilitated production and reduced the problems involved in the manufacture of women's garments which previously were more intricate in design. The one piece dress was readily adaptable to mass production. From this time on mass production of clothing has become more scientific, and technological developments in this industry since 1918 have resulted in an industry which today is a part of the second largest industry in the United States.

B. THE IMPORTANCE OF IMMIGRANT LABOR AND THE ILGWU.

A great deal of the credit for the development of the ready-to-wear industry should rightly be given to the Jewish immigrants from Russia and Germany, as well as the Italians, who flocked to America during the last thirty years of the nineteenth century. Among these immigrants were many highly skilled tailors as well as unskilled workers. The clothing industry offered work to these immigrants but they worked under sweatshop conditions and were "herded" together with people of their own nationality. The entry of these people into the industry laid the foundation for the course it was to follow. The industry grew rapidly with their arrival, for they were readily absorbed into the sweatshops, which were frequently owned by an immigrant worker who had

saved enough to set up his own small contracting business. The "task" system soon developed, the team of three often working eighteen or more hours per day, in an attempt to finish the work required by the contractor. Taking advantage of the lack of organization among the workers the contractor cut wages for the slightest reason. This "task" system spread as competition increased between contractors, and soon manufacturers were able to set their own prices. Almost unbelievable tales of deplorable working conditions in the industry are typical of this era. Similar conditions characterized all other established garment centers of the United States.

The contracting system had an inhibiting effect on the development of the industry. The only solution seemed to lie in the organization of the workers. Towards the end of the nineteenth century the women's garment workers began their first attempts to organize, and today, their union, the ILGWU, founded in 1900, is one of the wealthiest and perhaps the most powerful in the country. From this time on, the development of the garment trades is closely allied with the history of the ILGWU. To follow this in detail would be beyond the scope of this paper, but a brief survey of its development follows.¹

At the turn of the twentieth century the union was born, and soon began agitating for better working conditions for the workers. The workers, however, were not united, and so the strikes called at this time, in different parts of the country, were not successful. Some progress, however, was made and membership did increase a little during the first few years of the twentieth century, but a succession

1 For further information about the history and development of the ILGWU see, Levine, L., op. cit; Stolberg, B., op. cit., Seidman, J., op. cit.

of unsuccessful strikes soon depleted the ranks of the union.

In 1910, after a great uprising of the workers, which lasted nine weeks, the now famous Protocol of Peace was signed; an outstanding document, not only in the history of American labor, but also of world democracy. This protocol, among other things, raised the level of wages in the industry, and at the same time set a standard wage. This was the first collective agreement between industry and management in the country, although it was not entirely successful nor adhered to for long. Gradually other garment centers called strikes which were rapidly settled with agreements based on the protocol signed in New York. The New York strike did not solve all problems within the industry, but neither did it greatly increase the ranks of the union. Nor did the Protocol work satisfactorily, for employers really paid little attention to it. Unsatisfactory conditions followed until America entered World War I in 1917, and after the war long and bitter strikes broke out in many parts of the country. Although there was constant strife within the union itself, it was not until the depression and the concept of the "New Deal" that the garment industry really came into its own. The membership of the union boomed with the National Recovery Act, and with increased finances so obtained, the union was able to do much for its members. From this time the industry has gone ahead and the union has become the most powerful in the country.¹

C. THE CONTEMPORARY IMPORTANCE OF THE NEW YORK MARKET.

World War II likewise brought about great changes in the garment industry throughout America. With Paris lost as a source of inspiration

1 Levine, L., op. cit.

America was truly on its own. Great progress was made during this period in all garment centers throughout the country. States adjacent to New York began producing more and better garments, which they marketed in New York City, resulting in a decrease in New York's volume production. Many of these younger markets have shown greater vision than the New York market, which still tends to rely on its past reputation. During the war years these competing markets organized ambitious promotional plans in an attempt to keep their market before the public. New York still tends to overlook this competition, although some manufacturers during the war years did realize the necessity of modernizing their industry so that it could better compete with the more efficiently operated factories of the younger markets.

In spite of this definite drop in volume production, New York is still regarded as the fashion center of the United States and still produces approximately 67% of the nation's total output. No doubt it will continue its supremacy as there are many factors in its favor. It has been said:

"New York is the center of the United States commerce, trade and finance, leader in many of her manufactures, magnet of the worlds of art, drama, opera, music; the terminus of transcontinental railroads and waterways and transoceanic airways, cosmopolitan in population, responsive to every pulsation of the national economy. New York by virtue of its geographical and economic position and by the very nature of its population seems to have been predestined to become a fashion-center and costume-maker-in-chief to the New World."¹

For years critics have been predicting the disintegration of the New York market, due to the trend towards decentralization. However,

¹ Industrial Bulletin, New York State Department of Labor, March 1947. p. 13

the reasons for New York's prestige as a fashion center are not difficult to determine. Perhaps one of the most obvious reasons is, that New York as the first real market has fifty years of progress behind it. As a port of entry, all immigrant tailors have passed through and most of them have stayed. Consequently, New York has always had a plenteous supply of skilled labor, which is so essential for the system under which the New York industry operates. This supply has been maintained through the years, being especially noticeable during the war years. This supply of skilled labor accounts for much of New York's strength. A survey made by the Department of Labor several years ago showed that a skilled worker in New York could produce a hundred dresses in the medium priced line in the same time that it took an operator in Philadelphia to make eighty; an operator in Chicago to make fifty-eight; one in California to make forty-two. In better dresses the difference was even greater, Philadelphia workers producing sixty-three dresses as compared with a hundred in New York.¹ This situation is generally agreed to be very much the same today.

Another important factor for New York's leadership is its nearness to supplies, materials, and related markets. All the leading trimming, fabric and machinery firms have their headquarters in New York. The market is also well supplied with firms offering quick service in dyeing, finishing, printing, etc. These subsidiary industries make it possible for New York to present a new style within a few days. Thus the pace of the New York market is speeded up in a way which can never be attained by the other markets. At the same time it causes one of

1 Ibid., p. 9.

the most destructive forces in the industry. that is, style piracy, an evil which may never be destroyed.

The fact that the industry in New York is so easily entered, has been another factor in establishing the supremacy of the New York market. Only limited capital is required, as contracting is the general system in New York. Many new firms enter the industry each year, while as many disappear. It is interesting to mention that the majority of the New York firms have been in business only about five years. As New York is the financial nerve center of the country, capital is readily available for investment. Thus this market is highly competitive and advantageous to the buyer.

Still another feature of special importance is that women's wear sells style. Because of the fickleness of fashion, manufacturers feel the need to "cash in" quickly on a successful style. This, of course, means, that he must be where the styles are determined and launched, and where supplies are readily accessible. New York City leads the country in having the largest concentration of well-dressed women; most of the leading designers and style magazines; as well as some of the best schools of design. Because of these factors, many of America's larger and more successful manufacturers, located outside of New York, maintain a New York office so that they may more readily sense the pulse of the market and the style trends. This latter fact is especially true of the eastern apparel manufacturing cities. Many of the firms in these markets maintain designers in New York, so that they too will be more conscious of trends.

Apparel Markets, a trade periodical, says:

"Although these sales offices seek to benefit from the strength of the New York market, their own presence, in fact, gives the market a degree of completeness it otherwise would not possess."¹

Many manufacturers, who have left New York for their actual manufacturing purposes, have still retained their headquarters in New York. All buyers visit New York at least once a year, and the resident buying offices represent retail stores from all parts of America, so that New York has come to recognize readily the type of garments that are desired in all parts of America.

Advantageous to the New York market are very sound labor laws maintained there which have helped to stabilize the industry. Of course, a great deal of the credit for this must be given to the ILGWU which has such powerful control of the industry in the city. The activities of this union are discussed later.

These then are some of the more outstanding reasons for New York becoming the nerve center of the garment industry, a market which is more highly diversified than any in the entire world. In spite of this, it is very flexible and compact, the industry being grouped into a relatively small area. The market is very easy "to shop" and this is a further attraction to buyers.²

In spite of these many advantages, there are those who feel that New York must strive hard to retain her leadership in the industry. Many manufacturers are concerned as to the future of the market, while others

1 Apparel Markets, 1948, op. cit., p. 153.

2 Apparel Markets 1947 and 1948. op. cit.
Industrial Bulletin. op. cit.

feel it will always be ahead of its rivals. However, in New York the garment industry is hit by every strike. Truckers strikes, converters strikes, etc., which occur frequently, completely tie up the market. Markets outside of New York are not affected in the same way, as they work on a long range plan of production, which is essentially different from the day to day plan of most of the New York manufacturers.

The New York market is inclined to accept its supremacy as traditional, but it has been shaken on two or three occasions and it may possibly happen again. For example, at one time it was thought that the mass printing business would never leave New York, but it did. Similarly the shirt industry was chased out of the city by the union between the years 1924 to 1928. Some feel that the same thing can happen with the lower-end, unit-price dress industry between the years 1947 to 1950. At the moment such a movement is extremely doubtful, while the supply of clothing is still short of demand.¹ It is beginning to be very obvious that there is a falling off of this demand, due to decreasing consumer needs, declining purchasing power or consumer price resistance, and a great supply of hard commodities which compete for the consumer's dollar. Critics of the New York industry think that it should regard its future with less complacency. Any movement of the industry from Manhattan would have such violent repercussions on real estate, marketing, and indeed, on New York, that it is far from likely that it will really happen.²

1 "New York's Dress Industry Battles for Its Future", Barron's, Nov. 25, 1946, p. 11.

2 Industrial Bulletin. op. cit. p. 35.

Many other major changes have affected the industry, and many of these changes have originated in the textile mills. During the war, and to a great extent since then, textile mills have had a tendency to cater only to the larger buyers. Most of these are manufacturing outside of New York in order to reduce costs through the use of non-union labor. Integration in the industry has also taken place to some extent, though not with outstanding success. During the war years, the New York market surged ahead as never before, as indeed did other fashion markets such as St. Louis, California, Chicago. These regional markets carried out a great deal of promotion, whereas the New York market, although it had already set up its million dollar Dress Institute, did relatively little. Naturally, New York must expect to lose some of its volume to these markets, but this increased competition does not really offer any serious threat to the city's leadership, as New York can more than equal the volume produced by all other individual markets. Some New York manufacturers do acknowledge the fact that, with the great increase in population in the west, the California dress market is bound to continue to grow. The newer and smaller markets are carrying on extensive promotional programs. This, and their expensive selling methods through the use of salesmen to cover the territory, greatly increases overhead costs compared with New York, which is so well established that it has never felt the same need for promotional activities. Consequently, New York has a lower selling cost despite higher labor and overhead costs. Buyers feel they get better value here than in any other market, preferring the New York article to that of any other state if they can obtain it at the

same price, even when the quality of workmanship is poorer. New York manufacturers feel that their greatest competition comes from those, originally of the New York market, who have left and set up their factories outside of New York and in states where they are able to use modern scientific methods of production. Unorganized labor reduces still further overhead costs. Despite decentralized operations these firms remain an integral part of the New York market where they show their line.

During and since the war, efforts have been made to stabilize the garment industry, making it less seasonal so that today it operates to a greater extent on an all-year basis. Wartime controls reduced the number of styles that a manufacturer could produce, so styles became somewhat standardized; and made it possible for production to be leveled out over the year. Some manufacturers have seen the value of this and are keeping to a somewhat standardized line which is well styled. Again, there was especially after the end of the war increased consumer spending power; and a greater demand for clothing than the manufacturers could supply. This meant that the manufacturer could sell whatever he made and production could be planned more satisfactorily. These factors made the work of the operator easier, and she too became more efficient. The greater the number of styles in production, the greater is reduction in efficiency of both the operator and management. During the war, the ILGWU did allow members to work overtime thus benefiting the manufacturer and operator. Today this ruling forbidding overtime is again enforced, and so production is impeded. If the union would lift this

restriction, many manufacturers feel they would be better able to compete with the regional markets.

There is little doubt in the minds of most people connected with the industry that New York will continue to dominate the garment industry for many years to come. It is interesting to note, that when the New York market was as young as some of the progressive markets of the West and Mid-west that its volume was no greater. Who can tell what will happen within the next twenty-five years, when so much progress has been made over the past twenty-five years? Perhaps, the future of the garment industry is to be found in an expanded export trade, but the regional markets are also making a great bid for this. When world conditions are stable and there is normal trade between the United States and the rest of the world, New York may find that the regional markets have obtained more than their relative share of this trade. However the following has been stated:

"The birth of these new apparel centers, Hollywood which owes its rise and growth to the glamor of the cinema industry; Chicago the biggest wash frock and junior miss producer in the country; St. Louis specialist in teenage styles; and the Southwest edging into the spotlight with children's and infants wear --- all these have rocked but not shattered the supremacy of the skyscraper city."¹

1 Ibid, p. 13.

V THE INTERNATIONAL LADIES' GARMENT WORKERS' UNION

THE UNION TODAY

The International Ladies' Garment Workers' Union is, perhaps, one of the most outstanding and influential organizations in the women's garment industry. Through its far-sighted administration, and its constructive, progressive program, it has more than any other group or factor contributed to the development of the women's garment industry of today. Therefore, any discussion of the women's garment industry should incorporate information concerning the aims and activities of the organization.

A brief resume of the organizational structure of the union is necessary for understanding how it operates. The basic unit of the ILGWU is the local union, which in the larger garment centers is united with other locals into a joint board. The board negotiates all agreements with the manufacturers in that regional market. In outlying areas, the locals are generally affiliated with district councils, and in some parts of the country regional departments supervise the work of the locals. The supreme governing body is the Convention. Every three years the union members send to the convention their representatives who elect the executive officers. A president, who also serves as secretary-treasurer, and twenty-three vice presidents constitute the general executive board. The Convention decides on the general policies of the Union to be carried out during the subsequent three years. The convention likewise constitutes the final court of appeal of the Union. Every member of the ILGWU belongs to a local which meets

2. In the second section, the author addresses the challenges of managing a large and diverse workforce. It highlights the need for effective communication and collaboration across different departments and regions. The text proposes various strategies to foster a cohesive team environment, including regular meetings, cross-functional projects, and the use of digital tools to facilitate remote work.

3. The third part of the document focuses on the importance of continuous learning and development. It argues that in a rapidly changing business landscape, employees must be equipped with the latest skills and knowledge. The text recommends investing in training programs, workshops, and conferences to ensure that the workforce remains competitive and adaptable.

4. The fourth section discusses the role of technology in modern business operations. It explores how digital transformation can streamline processes, reduce costs, and improve customer service. The text provides examples of successful digital initiatives and offers guidance on how to select and implement the right technology solutions for an organization's needs.

5. The fifth part of the document touches upon the importance of ethical leadership and corporate social responsibility. It stresses that businesses have a responsibility to their stakeholders beyond just profit-making. The text encourages leaders to set a positive example by promoting ethical values, supporting community development, and ensuring fair labor practices.

6. The final section of the document provides a summary of the key points discussed and offers some concluding thoughts. It reiterates the importance of a holistic approach to business management, one that considers financial, operational, human, and ethical factors. The text ends with a call to action, urging leaders to embrace change and innovation to drive their organizations forward.

at regular intervals. These locals are of four kinds: craft, trade, industrial or language locals. Each local sends delegates to the Joint Board. or District Council, which in turn sends one delegate to the Convention. As these representatives are selected by the members of the locals, both directly and indirectly, they do contribute in determining the policy of the union, as well as exert their influence throughout the structure of the union.¹

Today the ILGWU is one of the world's leading labor organizations and may well serve as an example to other labor groups, in as much as it has shown that labor can work effectively with management for the best interests common to both. In organization the ILGWU may be said to be semi-industrial in that it has not only done much to improve the conditions of the workers, but it has likewise done a great deal to improve production and management methods.

It was under the leadership of David Dubinsky,² who was first elected president of the ILGWU in 1932, that the union began to develop into the powerful organization it is today. When Dubinsky came into power, the organization had a debt of two million dollars, while today the union administers funds of eight and one-half million dollars. The membership has increased from 40,000 to 400,000. In 1932 the first collective agreement with six employer associations was signed. Today over fifty other such agreements have been made. Small wonder, Dubinsky

1 Structure and Functioning of the ILGWU, New York, Education Department of ILGWU.

2 For further information see Stolberg, B., op. cit., pp. 156-201. "Garment Workers", Fortune, November, 1946.

has been retained continuously to direct the policies of this now powerful union. Dubinsky, particularly since the beginning of World War II, has achieved public recognition so that today his is one of the few names in American labor known to the general public. He is one of New York's leading civic figures serving on the board of directors of many different labor organizations. Much more should, no doubt, be said of the work of this outstanding labor leader but the scope of this paper does not permit. Of course, his success does depend, to some extent, on the fact that the National Recovery Act came into being shortly after he became president and made possible social and economic changes within the industry. This should, however, in no way detract from his record and outstanding qualities of leadership.

In the opinion of many people the great development of the industry and the union was due to the New Deal policies. The membership of the union increased tremendously, and from this time on the union became a powerful factor in the industry. With an increased membership came increased funds, which made it possible for the ILGWU to offer its members many advantages.

The author does not plan to review the work of the ILGWU and its fight for recognition through the years from the New Deal to the present day, but she does feel that it is of value to discuss briefly the activities it engages in for the benefit of the members and the industry. Labor has recognized the fact that it is only through industrial efficiency that good labor relations may be maintained, resulting in the most satisfactory working conditions for union members.

There are still many factories unorganized, but the ILGWU aims to achieve this, in spite of many setbacks it has received. A general flight of manufacturers from the cities in an attempt to obtain more and cheaper unorganized labor has been a general trend for many years. In this way manufacturers are able to evade union demands and at the same time reduce overhead costs. In the main, the union has now been accepted, garment producers having come to realize that in many ways its advantages outweigh its disadvantages. However, there are still manufacturers, particularly in some of the regional markets, who prefer the non-union shop as it gives them greater freedom in organization and production. Today, many small towns find themselves with a flourishing garment industry furnishing employment for its population. In some cases citizens in these small towns have subscribed to common stock to fill the town's share in the establishing of a garment factory.¹ Local city authorities encourage the establishment and continuance of industry in their area. Although the union is making strong drives to bring such establishments under its control, many thousands of workers are still unorganized.²

The ILGWU reaches into every branch of the women's garment trades, covering not only all branches of women's and children's apparel but also the accessory industry. Its aims are not only to prevent exploitation of labor and to improve working conditions within its own industry but also to work for the advancement of all labor within the

1 Mollet, C., op. cit. p. 23.

2 Shelton, W., "Labor, Small Town Stuff," New Republic, November 3, 1947.

community, the nation and abroad, because it realizes that the well-being of all workers depends on the security of all workers. As a result, the union has provided financial support to trade-unionists in Europe, the union having been affiliated with the International Clothing Workers Federation, until it was destroyed during World War II.

In spite of its apparent strength, the union realizes that it has problems to solve, many of which arose as a result of wartime expansion within the industry. To some extent the union has been successful in dealing with these problems, although it is probable that many will not be properly settled for several years. Some of these problems were presented in 1944 by Stolberg in The Tailor's Progress¹ and their solving will undoubtedly have far reaching effects on the future of the garment industry. Problems which have significant implications for the future of the industry may be briefly summarized as follows:

1. What will happen when war production ceases and thousands of former women garment workers, who are now engaged in making airplanes, try to reenter dress factories?
2. What will happen when the new and highly rationalized garment factories set up during the war, cease manufacturing uniforms and return to civilian production? Many such plants operate in traditionally non-union, low wage regions. With peace will more industry develop in these areas? How will the International meet this challenge of technical efficiency coupled with low working standards?

1 Stolberg, B., op. cit., pp. 339-341.

3. Will a decrease in purchasing power greatly affect the garment industry, when it has to compete with the renewed mass production of household commodities, for its share of the decreased national income?
4. Will design simplification accelerated by the wartime controls continue? Or will there be a reaction against functionalism and streamlining in dress?
5. Will the American design movement continue to flourish after the war, or will Paris once again become the fashion capitol of the world?
6. What will be the impact on the industry of technological developments in textile production and machinery for garment production?
7. What effect will scientific management have on the craft system in the union?
8. What is the future of the needle? There already exists the "sewing" machine which welds fabrics. Other developments are bound to follow.

Few of these problems have as yet been satisfactorily answered. Indeed, it is still difficult to see where the industry is heading, although technical developments are bound to have far reaching effects on the industry. These constitute further factors which the union must meet. Scientific management appears to have become the secret of successful production, but again the problem is to keep a sense of proportion so that its use is not overdone. The union must work to

determine the most satisfactory methods for the application of these new principles.

There are several different departments maintained by the ILGWU which should be briefly mentioned.

1. EDUCATION DEPARTMENT

From its early beginnings, the union has always done much for the education of its members. The contribution of the Educational Department is perhaps one of its more important features. The department was originally established in 1917, although educational activities had been carried on before this date. The program is extensive as the union feels the education of its members is a necessary function for the maintenance of its power.

This union has, through education, brought an increased range of living and higher standards of living to members of well over three hundred groups. The union grants scholarships for active members to special institutions; fellowships to Harvard University, and a two week ILGWU Institute at the School for Workers held at the University of Wisconsin each summer. Special training courses are also given newly elected union officers. Considerable attention is given courses for new members. These are held in key cities as the Educational Department serves all Joint Boards. The department publishes pamphlets, book and lesson outlines, and also supplies speakers for educational, civic and other groups. A cultural division carries on classes in music appreciation, painting, dancing, arts and crafts, and dramatics. Recreational, social and athletic groups are also organized.

2. MANAGEMENT ENGINEERING DEPARTMENT

In 1940, despite increased production to fill government contracts, the garment industry remained highly seasonal. In an attempt to overcome this "enemy" of the industry, Dubinsky hired production experts to make a study of the New York market. This survey found the industry very inefficient. For example, there was little or no cost-accounting, little or no production planning and poorly serviced machinery, all resulting in low plant efficiency and increased prices. It appeared that the answer to the situation existing in the New York industry was greater production efficiency and more promotional activity. After considerable negotiation with the manufacturers, efforts were made to meet these demands. From this research developed the Management Engineering Department established in 1941 under the direction of William Gomberg. Today there are similar departments in Los Angeles and Chicago. Few members of the original staff remain, because this department serves as an excellent training ground, the staff soon leaving for better positions. However, they do enter executive positions with an understanding of labor that they would not have otherwise. Gomberg, on the other hand, is a true labor leader, preferring to remain as head of the Management Engineering Department since his appointment. This department has, since it was first established, performed many valuable duties. Not only has it assisted the union shop members to recognize good time study practices, and more efficient production methods when determining piece rates, but it has frequently carried out at no cost to management the complete reorganization of production methods. Such reorganization sometimes takes several

months. The department operates a time and motion study laboratory, equipped with all necessary technical equipment. Time and motion study courses, so important in industry today, are given annually at the summer school in Wisconsin. Union members benefit from the work of this department as it frequently introduces suggestions for improved production methods which increase piece-work output resulting in increased earnings for the workers.

3. RESEARCH DEPARTMENT

Another important department of the ILGWU is the Research Department which collects and analyzes information on all phases of the economics of the garment industry. This department maintains a library containing information on earnings, industrial standards, consumer trends and all subjects of interest to the union. It carries out special investigations, makes fundamental studies, compiles industry statistics, surveys trends and gives information concerning the industry and the union when requested. This department of twelve is directed by Dr. Lazare Teper, another leader who has devoted himself to the work of the union.

4. SPECIAL FEATURES OF THE ILGWU

Publications

The ILGWU publishes four official journals in four different languages: Justice, published bimonthly in English, and monthly in Spanish, Yiddish and Italian.

Unity House

An important institution of the union is Unity House, established in 1917. This four million dollar hotel is located in the Pocono

Mountains of Eastern Pennsylvania. Unity House, operated on a non-profit basis, is maintained by the manufacturers' contributions, three and one-half to five percent of their payrolls. During the summer season 10,000 members are lodged and entertained there. Among the recreational facilities offered are basketball and tennis courts, television, puppet shows for children, etc. Unity House is felt to be the forerunner of workers' vocational playgrounds throughout the country.¹

The Union Health Center

The Union Health Center was first organized in New York in 1913, but today they also exist in St. Louis, Philadelphia, and Fall River, Massachusetts. Functional health programs operate in other cities such as Los Angeles and Boston. In the New York Union Health Center there is a staff of over one hundred physicians. General medical care and special services are offered. Sickness insurance is available for most members of the ILGWU and after 1946 additional health and welfare benefits were inaugurated. Since 1937 a small death benefit fund has been available.

Radio Stations

In order to expand the work of the union in public relations and community welfare, it now operates six (FM) radio stations situated in different parts of the country.

Other Departments

There is a trained staff to deal with legal problems frequently arising in negotiations between management and labor. An auditing

1 A number of large garment manufacturers in the regional markets have organized country clubs for their employees which are very similar to Unity House. The Donelley Garment Factory is one such firm.

department is responsible for checking the books of all manufacturers.¹

These then constitute the main functions and activities of the union. Although headquarters are in New York, it branches out into all large market centers where most of the activities previously discussed are also carried on. Its work is essentially the same in the main regional markets, although their greatest effort at present lies in an attempt to unionize unorganized plants and organize operators in men's wear factories who are participating in the production of women's coats and suits.

It is the opinion of some that the union talks a great deal about working with management to improve efficiency and production but in the New York area really does little about it. To do this would hasten production, with consequent wage loss to the worker under the contractor system which characterizes the market. In the regional markets, where sectional work is well established, the union has helped a great deal in the organization of scientific management methods. Under this system the worker benefits by better working conditions, increasing volume production and therefore wages.

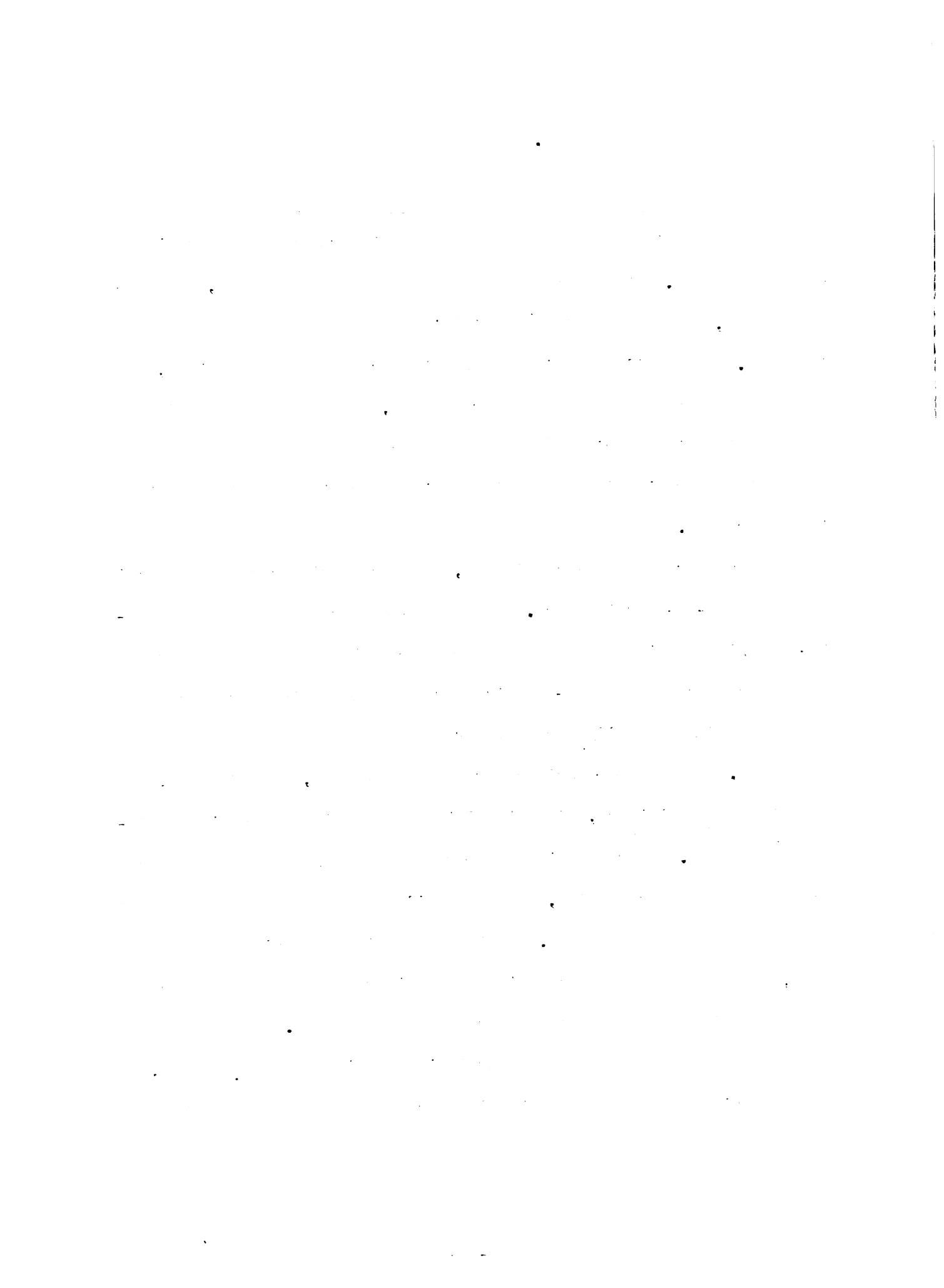
1 Material in these sections on departments and activities of the ILGWU was obtained from Structure and Functioning of the ILGWU, op. cit.

VI. REGIONAL MARKETS

INTRODUCTION TO THE REGIONAL APPAREL MARKETS

So far nothing has been written of the importance of the regional apparel markets. There has been some discussion of New York, the parent market, because this is essential in any account of the garment industry. No details are given concerning present day conditions, trends and prospects of the New York market, but the author feels that it is quite possible to have an understanding of the apparel industry in the regional markets without incorporating that information in this report.

As has already been established, New York early assumed leadership in the ready-to-wear industry. As the demand for many types of ready-to-wear clothing increased and overhead costs increased, manufacturers and contractors sought non-unionized areas in which to operate. Thus the garment trades gradually began to spread beyond the environs of New York City. Among these earlier markets were Boston, Philadelphia, Cleveland and Baltimore, all but Baltimore retaining a position of importance today. Over a period of years all of these markets have dropped in volume of production, but they still rank among the top producing markets of the United States. As the population gradually moved westward, other markets were established and flourished because the arrival of merchandise from the Eastern markets was very slow. In many areas the apparel market began as a central distributing or trading area, when the city was the last available source of supplies and equipment



for pioneers and travellers moving into the western and southwestern territories. The distance from supplies and the slowness of transport hastened this trend. The areas chosen for these apparel markets were not entirely accidental. They developed largely because of their geographical position and the growth of small cities and towns in the surrounding areas which created demand for more and better clothing than that sent them from New York. Demand for different types of garments from those of the East was created by differences in climatic conditions and occupation. All these factors contributed to firms establishing their manufacturing operations in the outlying regions.

The term "regional" as applied to the apparel markets is perhaps not an entirely correct choice of word as it may imply to the reader a market with limited distribution. Actually, most markets discussed in this paper have long since progressed from this stage in its development to nation wide distribution. The natural growth of these markets caused manufacturers to seek sales outlets outside their regional territory. Distribution was widened by salesmen who covered many states that otherwise would not have patronized their market. National advertising and elaborate market events have likewise attracted buyers to the different apparel cities. Moreover, improved transportation has facilitated or narrowed the inhibiting factors of time and distance. Specialization or diversification of products is also essential for increased distribution, and several of these regional markets have offered these attractions to buyers. As a result they have been able to steadily or even spectacularly increase their volume production.

The term "regional" is used throughout to differentiate these markets from the parent market in New York City.

Whenever possible, the history of the market is discussed. An attempt is made to explain why some markets have developed along certain lines, to become the specialized or diversified markets they are today. The early eastern markets were characterized by "sweat" shops, strikes and ultimate unionization of labor. In contra-distinction the markets of the southwest and the west, which have shown such amazing growth during the past twenty-five years have developed into progressive, modern apparel centers where excellent working conditions exist, despite the fact that only about fifty percent of labor in these markets is organized.

Many markets have developed a steady volume throughout the past ten years; while others have grown to market stature still more recently, gaining importance for the first time during the Second World War. It is difficult to determine which markets will retain their identity and which will be absorbed by larger and more important markets. Some cities are making a bid for a permanent place among the fashion markets and have inaugurated nationwide promotion of their market. Increased sales may signify that they are well established, but it is still difficult to predict their future. At the present time the garment industry is just beginning to settle back into its pre-war status and is again becoming highly competitive. Consumer demand for clothing is beginning to decline to a greater degree than has been noticed for several years and this is being keenly felt by the industry. The next few years may

bring about further stabilization of the industry and the markets may settle into some general order of importance in volume production. Increased export trade may definitely affect manufacturers production volume and dollar sales. Domestic as well as international relations which affect the entire economy will undeniably affect this industry.

It is difficult to give any accurate volume production figures for the respective markets which are to be discussed. The last available census report is the Sixteenth Census Report of 1939. Since that date extensive changes have taken place in the industry so these figures are not particularly significant without more recent data for comparison. The 1949 census of the garment industry is unfortunately not yet available. This survey¹ the most extensive ever carried out; when published, about June 1949, will contain interesting and vital data which may significantly alter the data used in this report.

Statistical data used in this report are taken from 1947 reports by the Market Planning Service, a division of the National Credit Office Inc.¹ These reports cover both the dress industry and the women's coat and suit industry. Some critics consider these figures of doubtful accuracy because they are based largely on estimates rather than entirely on production or sales figures. However, these data as used in this report, do provide a basis for comparison of the different markets. Apparel Markets¹ and market association reports have also served as a source of statistical information. In no case, have the figures agreed. However, this can be explained by the fact that there

1 See Appendix for tables.

is no absolute method of checking volume production figures for accuracy. Manufacturers invariably over estimate their output, and few manufacturers are certain of their actual volume production. Therefore, in reporting these regional markets, the reader's indulgence is asked if the figures cited are not in entire agreement.

Discussed at some length in these reports are the work and activities of the local market associations. An attempt has been made to show their importance to the local market, and the extent and ways by which they have assisted in its development and national recognition. Some markets carry on extensive promotional programs, this being especially true of the younger markets desirous of achieving national recognition and distribution. As a result, many of the older markets are increasingly aware of the necessity of their use of these recently developed promotional techniques if they desire to retain their current position of importance in the industry. Some cities show no concern because manufacturers feel they are well enough established to make it unnecessary to obligate themselves for this additional expensive overhead cost. They may, however, learn too late that they must likewise be progressive if their market is to survive, even though at the moment they consider production to be entirely satisfactory. The strength of any market comes from its unity. This was proved in many markets during the war, after they recognized that survival or continued development depended upon effective promotion of their merchandise.

The order in which the apparel markets are discussed, is chosen to correspond with their chronological development. As American

territory opened up, the population moved westward. It is only necessary to remember the order in which new American territory was opened for settlement to follow the establishment of new apparel markets.

From the eastern markets of New York, Boston, Philadelphia and Baltimore, the industry spread to Cleveland, Cincinnati and Chicago. The latter was the first important apparel center in the Midwest. It served an extensive area until other regional markets began to appear in other newly opened sections of the country. A flourishing industry developed in St. Louis, and as pioneers moved westward to California, the Kansas City market developed, and was subsequently followed by the San Francisco and Los Angeles markets, the latter having become the outstanding California market known as the world's sportswear center. About the same time pioneers were also establishing themselves in the northern sections of the country. Apparel manufacturing in Wisconsin and Minnesota originated in Milwaukee and the Twin Cities to become an increasingly important industry in those cities. Somewhat later, the Pacific Northwest was settled and the volume output of the Seattle and Portland markets continues to increase with area population increase. Among the more recently developed markets are those south of St. Louis. To the southwest is to be found the young and active market of Dallas, which is making itself felt by the entire industry. Atlanta, far to the south, is showing considerable growth, and in the southeast is the youngest of all the apparel markets, Miami, an enterprising young market.

Listed for the convenience of the reader is the order in which the apparel markets will be discussed;¹

- | | | |
|-----------------|------------------|-------------------------|
| 1. Boston | 7. St. Louis | 13. Pacific Northwest |
| 2. Philadelphia | 8. Kansas City | 14. Dallas |
| 3. Baltimore | 9. San Francisco | 15. Atlanta |
| 4. Cleveland | 10. Los Angeles | 16. Miami |
| 5. Cincinnati | 11. Wisconsin | 17. Other small markets |
| 6. Chicago | 12. Minnesota | |

1 As certain publications have been cited extensively throughout the market reports instead of being repeatedly foot-noted they will be designated as follows:

- a. Apparel Markets 1947 op. cit.
- b. Apparel Markets 1948 op. cit.
- c. National Credit Office Report, Dress Industry, op. cit.
- d. National Credit Office Report, Women's Coat and Suit Industry, op. cit.
- e. Levine, L., Women's Garment Workers, op. cit.

Issues of Women's Wear Daily, Fairchild Publication, which have proved valuable for the individual market discussions will be listed at the end of each market.

BOSTON

Boston claims, with New Bedford, the honor of being the first ready-to-wear market in the country. Whether this is the case or not, Boston was one of the earliest apparel manufacturing centers in the United States. The 1860 Census shows that there were ten cloak manufacturers producing a volume of \$462,000.^a There has, of course, been a tremendous increase since that date, both in production and in the number of manufacturers.

The story of the early days of apparel manufacturing in Boston so closely parallels that of the New York market that little need be said here. Gradually the distribution of the markets widened, the Civil War adding impetus to expansion. Men's and boy's wear was of first importance in the city, the volume production at one time being greater than that in 1939.^b

As in other cities, such as Philadelphia and Baltimore, the ILGWU played a significant role in the early history of this market, which until 1910 also suffered from deplorable sweat shop conditions, strikes and other evils. One of the more significant strikes in the history of the garment industry was called in Boston in 1907, the main issue being the acceptance of unionism by management. This strike was combatted and won by management, but it was at this time that many of the garment industry's foremost union leaders became prominent. Other strikes followed which echoed those of New York, and finally, in 1913, a "protocol of peace" was also signed in Boston.^c

The garment industry continued to grow, but until about 1933 the bulk of the city's garment manufacturing was in the hands of a few old and well established firms.

The great growth of this market took place between the years 1934 to 1945, during which time some effort in promotion was made. Since 1945 the growth has been nothing short of phenomenal. Today, Boston is an outstanding market for men's wear, as were most of the early markets on the east coast. Today, women's apparel production is in the ascendancy, being far more important in both production and distribution than is the men's wear industry. This great development in women's apparel is due to several factors which developed when the industry branched out into production of several different types of women's apparel.

The first major jump in production came in 1942 when a great number of manufacturers entered the sportswear field. So great has been the acceptance of their merchandise that Boston ranks well to the fore in this relatively new and typically American type of garment. This market has also concentrated on the production of junior styles, and is now offering keen competition to both the St. Louis and New York markets.

In sportswear Boston maintains definite leadership, especially in the manufacture of skirts, for which this market is well known. The estimated volume for sportswear for 84 firms is \$70,000,000.^a This figure also includes winter sportswear, of which Boston is currently producing a substantial volume. Many of the sportswear firms in this city feel that even greater developments are possible because

sportswear has, to a great extent, replaced the street and dressy dress which was previously manufactured in greater amounts in this market. Even though there are 90 manufacturers of dresses their volume production is only \$36,000,000.^a

In recent years the women's coat and suit industry in Boston has become quite important. This market is largely made up of young firms which have shown some progressiveness and annually produce about \$15,000,000.^a

The Boston Market is generally spoken of today as the New England market, which includes a greater number of manufacturers. Over two hundred firms have entered manufacturing during the past five years to produce all types of merchandise. Practically all were originally identified with old established New England manufacturers, and are not newcomers from other parts of the country. This is likewise true in most other markets: the growth of the industry and the men at its head can generally be traced to one firm, where training and background in the industry has been obtained. In this way the quality, style, and workmanship which have come to be characteristic of the Boston market, are maintained. This branching out, from a few firms, has resulted in an "esprit de corps" and a feeling of mutual help rather than the intense competitive relationship, so frequently found in the other markets.

Already the New England market is receiving recognition for its reliability and willingness to experiment. A popular and medium priced line is produced but quality is maintained throughout. The historical

background of the work of skilled tailors is partly responsible for the fine fit and tailored detail of Boston garments, especially in sportswear. Boston manufacturers say with pride that they "can match the fit of a Boston garment to any garment in the country".¹ There has developed a great sense of local pride in the industry. Having long maintained high standards of quality, style too, is now coming to play an important part in this market. This is probably due to competition caused by two hundred new firms, and also because this always seems to be the case wherever a market has young firms. Quality appears first, and once established, styling follows. Thus, new style ideas and promotions are beginning to emanate from the New England area. Recognizing how valuable new promotion techniques have been in the expansion of the garment industry in other centers, Boston, in 1946, began to launch a broad national program. Two nationally recognized consultants were appointed to coordinate market activities from the mill, through manufacturing, and, finally, to the promotion of the New England market. The market has already learned that in union is strength, and it is now participating as a single force in the battle of the regional fashion markets. Already some well known merchandise is produced here. A fund of fashion lore in its locale, climate, schools of higher learning and many women's colleges in the region are all being used to the greatest advantage for promoting their market.

The standards set up, and the growth of the market is really the result of the efforts of the Apparel Industries of New England, originally organized in 1918, though it is only in recent years that it has

1 Women's Wear Daily, September 8, 1943.

actively promoted the Boston market. The membership of this association is about two hundred manufacturers who are producing women's apparel. The prime objective of the association is now the promotion of the New England apparel. Institutional advertising is carried out by national advertising in trade and fashion publications, and on the radio. Advertising which emanates from this market is generally slanted to the many girls' colleges situated in the area, as they constitute much of the local trade. This also is the reason for the presence of a number of "campus style" leaders in the New England market.

The market issues a directory of its members and a monthly magazine is planned for distribution to the trade. There are hopes that this will be a valuable medium for articles reflecting the activities of the market, as well as presenting other informative material to the retailer. Plans are also in progress for the manufacturer to work more closely with schools of design in the city, some of which have an excellent reputation. A course somewhat similar to those of other established design schools is being discussed. Schools where labor can be trained are also being tapped and aided.

In common with most other markets, the local association has adopted a specific label for the market. This forms the basis of much promotion, which stresses Boston as a value and quality market. The New England Apparel market is the first of these older eastern markets to carry out any intensive promotion. Although their program is not completely organized or running smoothly, it may be seen that growth

and increased importance have resulted. Many hundreds of buyers now attend market showings, offered several times a year. An important future lies ahead for this apparel region for within a short period it has progressed far ahead of competing markets.

1 Women's Wear Daily, February 27, 1946; September 8, 1943
June 21, 1944.

PHILADELPHIA

No doubt, the average consumer is unaware of the existence of a great garment industry in Philadelphia. It is one of the oldest markets in the country, and has operated continuously since its inception and today is one of the top volume producing centers in the United States.

Philadelphia is another market with a history very similar to that of New York. Because this city was an important port of entry the contractors and factory owners met the immigrant ships, seeking skilled tailors whom they could press into service. Even at this time, manufacturers mainly operated on the inside shop system, and the factories were large. By 1890 attempts were being made to organize labor in the market. Bitter strife followed here, as well as in other eastern cities, but the Philadelphia manufacturers managed to prevent organization for many years. In 1914, "agreements of peace", modeled on the New York "Protocol of Peace", were signed by management and labor representatives, but results were unsatisfactory. Strikes and further disagreements followed. In 1921, the most bitter strike in the history of the Philadelphia garment industry occurred, ending in the defeat of the workers. It was many years before the ILGWU was able to consider the organization of this market satisfactory.⁶

The beginnings of the Philadelphia industry date back to the days of the itinerant tailor. Early in the nineteenth century some retail shops ordered garments from these men. The demand for men's clothing caused by visiting sailors and army requirements during the Civil War

induced manufacturers to enter this field. From this time on the story of the Philadelphia market is similar to that of Boston or New York. Because this market is one of the first garment centers in the country, men's wear developed early and is even today of greater importance than the women's garment industry. The Philadelphia market is no longer in its youth, although approximately one third of today's dress manufacturers, commenced operations during the past five years. However, the total number of manufacturers in the city has not increased in ten years. Since 1939, sales have practically doubled, but the market has dropped from first position behind New York to fourth, having fallen behind Chicago and then Los Angeles. Philadelphia still retains second place in the men's clothing industry, for which merchandise the market is well known.^c

More dresses are produced in this market than any other type of apparel. There are about fifty-one manufacturers producing chiefly, house dresses and sportswear and medium priced lines. Until recently, the greater number of manufacturers in the city produced dozen-priced dresses. Increased fabric and labor costs, are responsible for current selling on the unit basis.^a The emphasis is still on the popular priced line. A considerable volume is produced at this price level because Philadelphia is a leading children's and infants' market. Because of the absence of high styling the market is not generally known to the consumer. Volume output could be greatly increased if higher priced lines were included in the market. A considerable quantity of sportswear is also manufactured here, skirts, blouses and waists, for which

the city has long been famous. This branch of the industry produces \$32,000,000 annually, ranking second to the dress production of \$36,000,000.^a

The production of women's coats and suits, a natural outgrowth of the men's wear industry, is also important in this market. The industry has gradually fallen off in volume production, with the expansion of markets such as San Francisco. In Philadelphia, around forty firms produce \$10,000,000 annually,^a many specializing in better priced merchandise. An interesting feature of this market, which grew through the contract and sweatshop era, is that in both the coat and suit and the dress industries most garment producers own their own factories, so that very little contracting is carried on there.

The Philadelphia market has done little or nothing to publicize its merchandise, nor has it made any attempt to attract buyers to the city. The men's apparel manufacturers have, quite recently, made some attempt to again assume leadership, but this has not affected the women's garment industry. The only women's apparel association in the market, The Philadelphia Waist and Dress Manufacturers Association, was organized, primarily, to deal with labor relations. So far, it has done nothing in the way of promoting the market. Many of the manufacturers maintain designing and selling offices in New York.

BALTIMORE

Baltimore is one of the oldest apparel markets in the United States; but it is no longer a very important market for women's wear, although it retains some leadership in the men's wear industry. This market is rich in apparel history. From the beginning of the industry in the United States, women's apparel manufacturing was an important industry in Baltimore, although the market never was as style conscious as New York, Boston or Philadelphia. Originally most of the apparel manufactured in the city went to the South, but today it has nation wide distribution. The market is more important for its coat and suit production than its contribution to the dress industry. As far as the former industry is concerned, Baltimore ranks eighth among the nation's markets.^d This is, no doubt, due to the fact that the market is a leading men's wear market so women's tailoring is a natural development. Skirts and dresses are other items of apparel manufactured in this market, these being mainly in the medium and popular priced lines. An estimated volume production of \$8,900,000 is given for the coat and suit industry, produced by fifteen manufacturers, and six men's wear factories who have also entered into this field.^d

Before the war, many of Baltimore's manufacturers were in the popular priced lines and manufactured house dresses and uniforms. With increased costs many of these firms have entered the dress market, which is currently producing an annual volume of approximately four and a half million dollars.^a This trading up of the price line is a general trend in the industry.

Baltimore does not have any local market association and this is the reason given by some for the fact that Baltimore is no longer an important women's apparel center. Recently, a few young manufacturers have entered the industry and this "new blood" is trying to encourage market consciousness. They feel this may help Baltimore become once again prominent. Together with other early markets, Baltimore is learning the value of unified market promotion from the younger centers which have made such progress through its use. In 1948 the first real market show in the history of the city's apparel industry was held.^b

CLEVELAND

Although Cleveland is one of the larger apparel producing cities in the United States, it is difficult to obtain much information on this specific market. The Cleveland market has never been promotionally minded, and does not really produce any high style fashions.

The Cleveland market is one of the earlier markets which developed in the East over a hundred years ago, and its history follows that of New York. From the beginning it was a prominent market, especially in the coat and suit industry. It still continues to retain an important position. This market was one of the first to set up "inside shop" factories, for the production of ready-to-wear in both men's and women's clothing. A few of the oldest houses in the country are to be found here. Men's wear production was well established by the middle of the nineteenth century, but it was not until the end of the same century that women's ready-to-wear came to be of any real importance in the city.

By the beginning of the twentieth century, Cleveland had become an important center, being especially noted for its coat and suit production. At this time it was almost as important as the New York market. By 1910, apparel was the second largest industry in Cleveland. Factory conditions were much the same as those in New York, with long hours and bad working conditions. Contracting and sub-contracting began to gain importance, though there were a number of "inside shops" with large, well lighted, well equipped factories built specially for garment construction.

Between the years 1900 to 1910 the garment industry in Cleveland showed greater progress than any other market, and, in spite of the many setbacks which the industry received in the second decade of the twentieth century, it continued to progress. The early development of the market is closely allied with the activities of the ILGWU, because it was during these years that the women's garment industry was organized throughout the country. After the signing of the "Protocol of Peace", in New York, the union was more or less forced to organize the regional markets, because the New York manufacturers pointed this up as one of the great dangers to the New York market. In an attempt to equalize labor conditions throughout the country, a general strike was called in the summer of 1911. Cleveland was chosen for this strike for several reasons, mainly because the market was well established and stable, with trade steadier than that of the New York market. The large inside shops found in Cleveland already had national distribution, having carried out extensive promotion of their leading brand names. Consequently, this market offered a compact group of workers who were well prepared for a strike. Grievances of Cleveland workers were the same as elsewhere. The strikers were supported by the New York locals and the strike lasted several weeks. Strike breakers were imported from New York with bitter strife resulting. The manufacturers filled most orders by using New York contractors, and setting up small plants outside of the city. The employers eventually won after four months, but at a cost of several million dollars. It was over seven years before the union was able to make any headway in this market. The Cleveland employers were anxious

Levine, Louis, op. cit. Chapters 24, 31.

to avoid any repetition of the 1911 strike, and the organization of labor in their market, so labor conditions were greatly improved by management. Some of the larger firms introduced scientific management and made a real effort to stabilize the industry. New policies were adopted towards employees, and in many ways, efforts were made to anticipate the demands of the workers and provide recreational facilities. Consequently it was difficult for the union to cope with the situation. However, the local membership gradually increased and by 1918 there was enough strength to call another strike.

As this strike was called at a time when military contracts were underway, a board of referees was appointed, and their discussions have since come to be known as the Hanover Award. This lead to the now famous "Cleveland Experiment"¹, union and management meeting for the first time in the history of the industry. In the ensuing agreements the first collective bargaining agreement was set up. Although the Cleveland Experiment actually affected a very small group of people, it did attract nation wide attention because it seemed to offer a new basis for peaceful and progressive industrial relations. It contributed much to the understanding of the general problems of industrial relations, in spite of the many limitations of the plan.²

From this time the market has shown steady growth due to the presence of few, but large establishments. During the past few years, the policies of the manufacturers have been influenced by the entrance of younger men in its ranks. They have brought enthusiasm into a somewhat conservative market.

Cleveland has always been responsible for a large amount of outer knit wear. At one time being the largest producer in the country. Changes in this industry have brought about the more recent developments in the market. In most regional markets apparel manufacturing has grown out of one house. In Cleveland, the oldest knitwear firm in the market has served as training ground for many of the younger, remarkably successful houses. It might even be said that this parent house has been "outstripped" by its "offspring".

About the mid-twenties the demand for knitwear greatly decreased and many knitwear houses in the market closed or began to enter the sportswear field which was beginning to gain importance at this time. Since then, the market has made considerable progress in this field of women's apparel, and today some of the countries largest sportswear houses are found in Cleveland. Two houses claiming this distinction, are but five years old, commencing operation in a small way during the war. Cleveland is a market of few, but large concerns. As a result, its annual volume production appears out of proportion to the number of manufacturers.

Today there are twenty-three firms manufacturing dresses and sportswear for women and misses, mainly in the medium and popular priced lines. The medium priced dresses constitute the main price range. It is estimated that the volume of the group is around \$20,000,000.^b each year, a considerable expansion having taken place in the industry in the years since 1939. This is due to the natural increase during the war years, and the progressive nature of the newer houses which have already

earned an enviable reputation in the dress industry. There are also a number of house dress firms, not producing a great volume, but swelling the total production of the market. Increased fabric and production costs have enduced them to enter the dress industry with a higher priced, better styled line.

Of considerable importance to this market is the women's and misses' coat and suit industry, and again, as with the dress industry, the considerable volume produced is mainly due to the output of a few, well established firms. Ranking seventh in volume production in this industry, Cleveland has fallen far behind its original position. Nevertheless, it has shown considerable increase in volume over the past ten years.^d Indeed, the Cleveland apparel industries have shown a greater increase in production than any other market, this being well above the national industry increase. The fourteen manufacturers in the market produce an annual volume of about \$13,000,000.

Cleveland now has national distribution in both the dress, and coat and suit industries. Being close to New York, the market is closely keyed to New York fashion trends, and most firms have designers working in New York, in preference to Cleveland. As a result, there is nothing distinctive about the garments manufactured in this market, as compared with those from the markets West of the Mississippi.

The Cleveland market is not promotion minded. Manufacturers do not feel it is necessary to carry out united market promotion. Several leading firms do advertise nationally, and to a great extent the market depends on the leadership of these firms. An association,

The Associated Feminine Apparel Industries of Cleveland, has been formed, but has done little to achieve united promotion. Four times a year a section is taken in Women's Wear Daily to promote the Cleveland market. The main work of the association is in maintaining good industrial relations. Plans are being made for market weeks, four times a year, in an attempt to bring buyers into the market. This is a new venture because salesmen have always been used to cover the territory where the Cleveland apparel is distributed.

The criticism has been made that Cleveland manufacturers are not sufficiently style conscious, and that this must improve if they are not to be left behind in the post-war race among the fashion markets for a greater share of the nation's volume production. Some houses are definitely trying to improve their styling, but surely there is opportunity here, in such a well established market, for some high styled houses to commence operation. Cleveland is a wealthy city with large and progressive retail stores. If the market awakes to the growing importance of promotion in the garment industry, not only for the individual, but also for a unified market, there is little doubt that it can continue to increase volume production.

CINCINNATI

Cincinnati is the smallest of the major women's apparel producing centers, and is one of the older established markets in the country. It is not as well known by the consumer as some other markets, because it is yet another market which has not carried unified promotional activities.

Before the Civil War, Cincinnati was the largest apparel market in the west. However, as Chicago, St. Louis, and other cities grew, Cincinnati became less important as a trading post; and consequently less important as an apparel distributing and manufacturing center. Apparel manufacturing was well established in the 1890's, and expansion continued slowly until about 1910 when Cincinnati pushed ahead to become one of the more important women's wear centers in the country. It retained this position even after the great western expansion because it was still an important trading center for the south. It was its importance geographically, as far as access to the South was concerned, that helped originally to build this market.^b

The Cincinnati market was, and still is, more important for its men's wear than women's garment industry but, in spite of this, it ranks eleventh among the regional American markets. An important volume of women's coats and suits is also manufactured in this market, several men's wear manufacturers having recently entered the industry.^c

One half the manufacturers operating in this market have been in business over twenty years, and this has resulted in a stable and

well established market. It is a market of a few, large concerns, and in the dress industry three very large concerns account for over ninety percent of the total market output. Street dresses are the main garments manufactured, and production has increased to outstrip the once leading coat and suit industry. The greatest volume is produced in house dresses, though about thirty-five percent of the annual five million dollar volume is in the medium or popular priced lines. About two million dollars is the value of the coat and suit output. The market's largest firm has developed a unique and effective means of distribution. Their garments are sold on commission, by agents, mostly women, who work on a home-to-home basis, covering the entire country.^c

As yet, there is no active market association in Cincinnati, though tentative efforts have been made towards the organization of such a group. When, and if, it is formed, the market is bound to show more progress, slow and steady growth being possible, if a good promotional job is done. Manufacturers are inclined to feel that there is no need for unity, as they are at present individually successful. In spite of a lack of promotion the market has remained one of the larger volume producers in the country, although it has dropped far behind the position it once held. Cincinnati is situated in a rich and rapidly growing area. Thus it can draw on many hundreds of retailers, and in this way reach millions of consumers. If this market would stage market weeks, buyers would certainly be attracted to the city.^b

CHICAGO

In 1860, apparel was being manufactured in Chicago which was already an important city. Only men's wear was being manufactured then; but by the time of the Chicago fire, in 1871, it was relatively well established as a women's garment center. It took several years after the fire for the market to again assume any degree of importance.

Here, as elsewhere, apparel manufacturing grew after the city became an important wholesale jobbing area. With the increasing population in the city and surrounding rural areas, wholesale jobbers and retailers began to demand a steady flow of merchandise. This could not be supplied in sufficient quantities by the Eastern markets, and deliveries were so slow that jobbers began to use contract shops in Chicago. As a result the market began its slow growth toward becoming the most important of the regional markets.

The garment industry in Chicago soon attracted thousands of immigrant tailors who were readily employed by numerous small contractors beginning to operate in the market. Seeking better conditions than those in New York and other Eastern markets, skilled tailors found conditions equally bad. Soon "sweat shops" appeared and factories were set up in the worst possible tenement houses. At the same time that the contract system grew apace in the city, there also developed many large inside shops where working conditions were somewhat better. The lack of good conditions eventually led to the first organized strike of the Chicago garment workers who were mostly employed by the coat and

suit houses. This strike of 1895 was unsuccessful and continuing discontent resulted in further strikes. In 1910, a strike was called against the wishes of the New York leaders, immediately after the unsuccessful strike in Cleveland. It was no more effective in its attempt to organize the large "inside shops" of the market than the one in Cleveland. This defeat resulted in a serious setback for the union, and discouraged labor from becoming members. A strike four years later, however, did accomplish this aim. Avoiding an agreement similar in form to the New York agreement, or with the name "protocol", the most satisfactory agreement to this date was drawn up. This introduced the closed shop but a number of manufacturers refused to accede to this. Gradually management and labor settled to the terms of the agreement, though 1919 brought further strikes, which were soon won by the workers. Other well organized and disciplined strikes followed, the workers securing their demands each time. The market was soon completely organized and the union has gained an important place in the structure of the market.⁹

Chicago, has always had wide distribution of its merchandise because even at an early date there were many hundreds of small retailers who could be readily serviced from Chicago. The manufacturers, using the inside shop method of production, had grown rapidly, and because of their size were able to give credit to these small retailers. The market soon recognized the necessity for quality merchandise and thus began to develop a feature for which the market now has an enviable reputation. Chicago is a quality market. The attempt to produce

quality goods caused many contractors to revert to the "inside shop" system. This hastened a change which was of the utmost importance to Chicago as close supervision is essential for the production of quality merchandise. Soon other manufacturers saw the possibilities of Chicago as a distribution center and the market grew rapidly.

Manufacturing in Chicago began, as in the early markets, with the men's wear industry, and today is the foremost quality market in this field. As far as the women's garment industry is concerned, manufacturing gradually developed out of a jobbers market. The earliest clothing item made was the hoop skirt, then as demand arose, the coat and suit industry was started, a natural development from the men's wear industry.

A separate branch of the women's apparel industry grew simultaneously with the coat and suit industry. From this time on, the story of the Chicago market may be said to parallel the development of the "wrapper" into the house dress industry, an industry in which Chicago now leads the nation in both volume of manufacture and distribution. It was in the late 1890's that this industry really began. At this time the wrapper had gained a place of importance in the feminine wardrobe. It was the first garment of its kind to be made by mass production methods.

Before 1895 very few manufacturers had ventured into the production of the wrapper, most manufacturers in Chicago being employed in the manufacture of skirts, cloaks and suits. Gradually from the wrapper evolved the cotton house dress, to become an important although relatively small

part of feminine apparel manufactured in Chicago. Today these dresses are the most important single item of apparel produced in this market. House dresses are naturally more highly styled than in 1895; wrappers retailed from one to one and a half dollars each. Firms in this division of the industry showed a tremendous increase between 1900 and 1905, and until 1910 only cotton was used. Gradually lower-end rayons and other cheap fabrics came to be used. Since the war and its accompanying increase in prices numerous firms, originally manufacturing the dozen priced dress, have entered the unit price line.

In 1937, six hundred wash dress manufacturers from throughout the country held their first combined market in Chicago, and formed the National Wash Dress Association. As was explained in the census descriptions of some of the different branches of the women's apparel industry, the house dress industry is entirely separate from that of the "silk" dress. However, in any discussion of the Chicago market it is impossible to omit the development of the house dress, as this has always been such an important factor. The great volume of these dresses produced is due to the introduction of scientific methods of production by a number of the larger houses. Many new and efficient factories were built. As a result Chicago has become the largest center for the manufacture and distribution of the house dress in the entire country.¹ Chicago has for many years been the top volume producing regional market, but only rose to second position in the dress industry in 1939. This position is currently precarious on account of increased production in the Los Angeles market.^c

1 "Chicago Wash Dress Industry Marks 50th Anniversary", Women's Wear Daily, September 13, 1945.

The manufacture of dresses in Chicago increased so rapidly that the annual output in 1947 of \$76,700,000 is a figure three times that of pre-war production.^a This extraordinary increase has resulted from the expansion of some of the older firms and the entry of many new ones, a development which has taken place since the war. Fifty-one new manufacturers have begun operation since 1942. There are seven firms in Chicago which produce an annual volume of over two and a half million dollars.^c Chicago is really a medium priced market with an emphasis on high quality. More "better-price" garments are appearing, and some of their makers rank among those of importance in the country. About one third of the market manufacturers are in the popular price lines, most producing cotton house dresses. Chicago was once identified with the "fussy" street dress but the market now produces simple, classic styles which are in greater demand. It is this trend which is responsible for the building of Chicago's multi-million dollar apparel industry.

The increased demand for sportswear has also been important to this market. Because of its less seasonal character, sportswear has helped in many ways to close some of the seasonal gap in garment production. The more standardized clothing becomes, the fewer are the style changes. It appears that in sportswear American women desire functionalism and comfort rather than individuality. There are now over fifty manufacturers in Chicago producing all kinds of sportswear, valued at \$37,800,000 annually.^a

The coat and suit industry is quite old, as it was in this branch that the city first began manufacturing. It grew steadily till the 1930's when the dress and fur coat trade greatly affected its output. Numerous manufacturers from the east operated branches in Chicago thus reducing possible business for the local manufacturers. By 1930, there were few firms manufacturing coats and suits in the city. Many of those remaining, decentralized and located in smaller adjacent towns. The importance of the coat and suit industry continued to decline as it had been superseded by the dress industry. It did gradually stage a comeback and has continued to grow to become now the fourth largest volume producing market in the country. Its volume is now \$33,200,000 as compared with the 1939 figure of \$11,292,000.^d

Chicago is ideally located for an apparel market as it is only an overnight ride from seventy percent of America's retail buying trade. Forty-five percent of the total population of the United States live within the twenty-two states comprising Chicago's actual wholesale trading area. Without becoming a garment manufacturing center its geographical position predestined it to become the primary distribution center of the nation.

This market is the most diversified outside of New York, as it offers a vast and varied selection in every phase of fashion production. It is in no way a specialized market. Chicago began as a regional market catering almost exclusively to the Mid-west, but now buyers are attracted from every state and several foreign countries. Chicago does not try to compete with the high style fashion centers of the world,

but is characterized by its production of medium priced, well styled clothes of good quality. The retailer has learned that when he buys merchandise in Chicago he buys quality goods. which are saleable, for it is the pride of the manufacturers that a Chicago fashion "never reaches the mark-down rack".^b Their garments are designed to suit American needs, "simple, wearable clothes with dramatic touches which keep them from being ordinary".^b

Because of these important features of the Chicago market the war years saw the opening of numerous resident buying offices for all the larger retailing and buying establishments in the United States. Many thousands of other buyers visit the market several times annually attracted, not only by the manufacturers, but also by the numerous wholesalers and other firms carrying open stock. This helps make Chicago a complete market.

There are several important market associations in Chicago and two main shopping areas. As far as these shopping centers are concerned nothing need be said of the wholesale area, as this is similar to the wholesale area in any apparel market. It is mainly centered around the Loop, though the industry, through lack of building accommodations, has for some years now been decentralizing.

The Merchandise Mart is such an aid to buyers and so important to the city that it is interesting and somewhat essential to say something of its organization, in so far as the apparel industry is concerned. Situated in this unique merchandising institution are the city's four high-style women's apparel houses having manufacturing

space and showrooms in the building. The office of the Chicago Fashion Industries is likewise situated in the Mart. Four hundred fifty-six lines of women's, children's, infant's wear and accessories representing manufacturers from every apparel market in the United States are displayed in this one building.

Important events in the Chicago apparel market are the semi-annual shows arranged by the Merchandise Mart. Breakfast Style Clinics organized by the promotion staff of the Merchandise Mart have become quite famous among visiting buyers. These clinics have a great influence on buying trends, and at the same time present, through carefully chosen styles, an all-over picture of what is available in the Merchandise Mart. "What's New" Clinic books are another outstanding feature of what the Merchandise Mart does for its tenants. These books are prepared by the style consultant of the Mart, and they have become "buying bibles" for those attending the clinics. Information includes what is new in apparel, the promotional points of the garments, merchandising ideas, fashion forecasts, style trends, and frequently ideas for advertising and display. These clinics have been offered for about twelve years and are greatly valued by buyer and exhibitor alike.

There are several other markets held in Chicago during the year, although all exhibitors are not exclusively Chicago manufacturers. These markets are significant to the development of the market as they draw several times each year, thousands of buyers into the city.

Perhaps the oldest, and maybe the largest of these is the National Wash Dress Association which exhibits at the Palmer House Hotel.

This association founded in 1933, today has over six hundred members who come from practically every state in the union. Their market weeks are frequently high-lighted by an elaborate fashion show. Chicago is naturally the headquarters for this association, as it is the largest wash dress market in the United States. The association not only carries out a great deal of promotion but also acts as a liason between management and labor. Its activities and work have had a profound influence on the development of the Chicago apparel industry.

The Style Exhibitors Inc. of the Morrison Hotel is another large organization exhibiting hundreds of lines of feminine apparel and accessories. Again membership includes many manufacturers outside of the city. Seasonal markets are held several times a year.

These then are the main organizations which sponsor market weeks in Chicago. All have played their part in making Chicago an excellent "shopping" market. These different associations seldom have coordinated market weeks, and this leads to frequent criticism by buyers. During the war these associations' membership increased, and in an effort to keep the names of different manufacturers before both trade and consumer, elaborate fashion shows were frequently arranged. This was done several times by the wash apparel industry because civilian supplies were very low.

The foregoing discussion has been of market associations in Chicago whose membership consists of manufacturers from every apparel market in the United States. There exists also an association formed for the promotion of all apparel and accessory manufacturers of Chicago,

known as the Chicago Fashion Industries Inc. So great has been its influence on the development of the market, that it is essential to discuss its organization and achievements.

The original promotion of the diversification of the Chicago apparel market and the value of buying there, was the work of the Chamber of Commerce who did much to stimulate buyers into attending the seasonal markets. Dinners, style shows and addresses by leading industrialists and economists were among the attractions offered buyers in this attempt to arouse their interest. The Chicago Fashion Industries has gradually taken over these activities.

The Chicago Fashion Industries Inc. was formed at the close of 1943 for the promotion of the Chicago market. The membership was 157 but within a year it had increased to 400 and it is currently 455. The organization was formed because several manufacturers realized Chicago must be unified and have a coordinated promotion program, to present a true picture of the diversified market it is able to offer the retail buyer. This is an attempt to compete with other markets which are carrying on the same type of program in an effort to insure post-war trade.

The main activity of the association is the promotion of the market. For many years it has taken several sections annually in Women's Wear Daily and consistently advertises in all the important trade publications. Direct mail publicity in the form of brochures and pamphlets are sent to thousands of retailers throughout the country. News releases are issued to all newspaper syndicates, and

newspapers in the United States and foreign countries. Such advertising has been responsible for millions of lines of publicity received by the Chicago Fashion Industries.

Many other activities are carried on by this group. Transportation and hotel accommodations are arranged for visiting buyers, and everything possible done to help them "shop" the market. Information on resources of the Chicago apparel market is also supplied to the retailer whenever requested. In connection with this market reports and information concerning the activities of retail and manufacturing industries are also available. Assistance in advertising problems and individual promotions is given to its members. The association also acts as an informal agency for its members to secure models, designers, sales people and executives; and it sponsors its own modeling school.

Other activities are closely tied up with the promotion of the actual merchandise manufactured in Chicago. The association plans coordinated market weeks held four times a year. Style shows of Chicago made apparel are arranged for retail buyers, national press and consumers. On occasion manufacturers have tied in with the civic authorities presenting their industry as an important and integral part of the greater Chicago market.

Many special promotions have been sponsored by the Chicago Fashion Industries and three are especially significant: (1) A special consumer identification tag for Chicago designed and manufactured apparel is now used by every member of the association. "Skill is a tradition" is the proud statement of this market, which aims to produce merchandise of

high quality and workmanship. (2) The publication of the Chicago Fashion Industries Digest has also been of utmost importance in publicizing the local market. This is published four times a year and is distributed to thousands of retailers who regard it as an essential market directory, and fashion forecaster of the Chicago market. (3) The third important promotion was first held in 1945. This is the "Fashion Rhapsody" program which both trade and consumer have come to expect annually at the Civic Opera House. This event is sponsored by the Chicago Daily News and produced by the association, in the form of a musical comedy, employing professional artists. Chicago fashions are interspersed through the program. Approximately 40,000 consumers attend these shows during a period of one week. There is, at this time, close cooperation between the Chicago Fashion Industries and local retail stores which advertise and display garments shown in the "Fashion Rhapsody". All featured garments are available at this time for consumer purchase. The last of these events was designated by the mayor of the city as "The Chicago Fashion Industries Week". This shows that the importance of the industry to the city is recognized by city authorities, who are willing to assist its further development in every possible way. Many other special elaborate style events are arranged by the association and shows are often sent to other cities.^{1, b}

This market has shown its greatest development since the war. Before this period Chicago was known as "the center of the yokel industry", since it, as well as others in the west and mid-west catered to small cities with a population of approximately 15,000 and so had

1 Chicago Fashion Industries, News Release, 1948.

little demand for high styled expensive merchandise. Garments manufactured were frequently in bad taste and not desired by the better stores in the distribution area. Since the war conditions have greatly changed and the market is now recognized throughout the country as one in which quality workmanship and good styling is produced.

Since the war, many resident buying offices have been established in Chicago, and numerous branches of New York offices which came during the war have remained. The opening of these offices has been important to the market. At present their executives are encouraging the market to produce the popular priced "dressy" dress. If Chicago wishes to meet the superiority of the New York market it should produce garments in this price range for which New York and its nearby markets are the chief sources of supply. There are already a few manufacturers making this price range in Chicago because of the demand that has arisen in the market. Chicago still maintains the great volume of trade it accumulated so rapidly during the period of war shortages. However, some feel that the shortage of low priced dresses in the market is the only reason likely to cause Chicago to drop back from the second position it now holds in the dress industry.¹

1 Women's Wear Daily, September 13, 1945; November 13, 1946.

ST. LOUIS

The St. Louis apparel market developed quite early, but as a leading junior apparel market its story only began in 1934. The market prefers to think of this year as its starting point. The story of the St. Louis apparel market began when St. Louis became an important trading center. Pioneers journeyed into the newly opened southwest and western territories. St. Louis was, for several years, the last outfitting post for these people. Fur trapping also was important in this area and the trappers had to be supplied with goods. Thus, the foundation of the great St. Louis warehouses was laid, because considerable stock had to be held. The pioneers were followed by settlers, creating a still greater demand for supplies. St. Louis was surrounded by rich farm lands, and bartering for implements and clothing characterized the early years. Thus a garment industry had to be established because of slow transportation of supplies from eastern markets. As the garment industry began to grow the demand for skilled labor brought a great influx of Jewish workers to the mid-west. They settled in St. Louis feeling that conditions were a little better than in the eastern markets.

Gradually the last outpost for the pioneers moved further westward, and so did the warehouses. St. Louis soon found itself a primary producer of clothing attempting to satisfy the demands of these warehouses which could not get sufficient, or frequent supplies from the East. Before the Civil War, New Orleans exerted a great influence on the industry in St. Louis but afterwards manufacturers copied styles

from the east rather than the south. Thus originated in St. Louis, as well as other inland markets, the long to be continued, and vicious practice of copying imported models. From the end of the Civil War till the beginning of World War I, St. Louis gradually developed from a jobber to a manufacturing center, with contractors doing the principal manufacturing.¹

Between 1918 and 1929 the industry showed considerable progress and many contractors became manufacturers in their own right. The market already had a reputation as a coat and skirt center, and quite an enviable reputation for good quality and styling. The traditions and soundness of the city had already become part of the industry.

The depression brought bankruptcy to the industry as it did all over the country. However, it was at this time that St. Louis developed the plan responsible for the survival of the market, later to become one of the more successful in the country.

The first step of importance caused the complete reorganization of the market into one notable for junior styles. There had already been tentative moves in different markets to develop a junior styled and sized garment, but it was in St. Louis that the first junior market was really born. In 1934, Mr. Irving Songer, merchandise manager of Kline's, a women's specialty store in St. Louis, made an effort to increase sales and interest the students at Washington University. He arranged with the School of Design, already in operation, to hold a fashion show of the students' designs. Prizes were offered for the most original creations. The show was most successful and the designs,

¹ Women's Wear Daily: September 21, 1943.

created by the junior miss for herself, were most eminently suited to this age class which was just beginning to receive national recognition as a group of special interests. After considerable difficulty, Mr. Songer, persuaded one of the St. Louis manufacturers to manufacture these designs, the garments to be sold in Kline's. They were exceedingly well received. Knowledge of this successful enterprise spread throughout the country and soon buyers from other cities were seeking similar merchandise from the St. Louis manufacturers. Gradually a junior dress market developed as increasing numbers of manufacturers recognized the great possibilities of this newly developed size range. From the production of junior sizes the idea soon developed to include the making of misses dresses with junior styling. Measurements for these new size ranges were determined by an analysis and by the results of considerable research conducted by the St. Louis market. Today, practically every factory in St. Louis is manufacturing junior styles in all types of apparel, including dresses, coats and suits, sportswear, lingerie, millinery and shoes. The value of the markets' production mounts annually. With the passing years the number of buyers, visiting the market from all parts of the nation, has greatly increased. However, the bulk of the St. Louis trade still comes from the south, mid-west and south-west.

The junior style influence has made itself felt, not only in the garment industry, but also in millinery and all-important shoe industry for which St. Louis has long been recognized. With expansion has developed an entirely new field of advertising and designing. In some

respects, the designing of junior styles is less competitive than the designing of other clothes, as there is the tendency, or one might say demand, for no great divergence of style. Once an idea has caught on with the junior miss, it will, during its reign, hold supremacy over all else.

Many factors have contributed to the rapid growth of the St. Louis market in the past fifteen years. In the main, it is supported by the activities of the Associated Garment Industries and its more recent affiliated branch, the St. Louis Fashion Creators. The latter organization carries on promotion.

St. Louis is a stable market, a fact which helped greatly in its reconversion in 1933. This stability is due, in part, to the fact that St. Louis is a city of tradition. The city is also credited with having the highest ratio of second generation, native born Americans, a fact which likewise may account for its growth and stability.

The story of this apparel market has been told many times in fashion magazines, reaching people in many parts of the world; and perhaps it has been publicized as much as the California market. Its success in the introduction and production of junior styles encouraged a great many American manufacturers to enter this division of the garment industry. The demand for St. Louis fashions is spreading beyond the United States, and today a large volume is produced for export. Manufacturers are already exporting to Australia, Canada and South America, and further expansion is expected with normal trade conditions.

As the development of a market so largely depends on the ideals and work of the market association, it is essential to review this market's expansion since 1933. Soon after the successful introduction of junior styling in the market, manufacturers gradually discontinued the old time practice of copying eastern styles. Copying was no longer essential because the School of Design at Washington University was supplying young designing talent, which appeared to know instinctively what was required by this newly developed junior market. Other designers in the local market began to understand these new demands, and manufacturers readily adapted themselves to the change. It was as if the entire St. Louis apparel industry had been stimulated into action by the foresight of one man, who had, in the beginning, so much difficulty in persuading local manufacturers to participate in a venture that subsequently had a tremendous impact on the entire garment industry.

Manufacturers in the market soon united to work out a plan by which they could rejuvenate their industry. As an outcome of their planning aims and objectives were defined. The notable success of the market which resulted from following these has had a profound effect on all other apparel markets.

A recognized factor in the success of the market from this time on has been attributed to the close and amiable relationship between the management and the ILGWU. Labor cooperated early and helped in establishing this market's leadership in junior styling. Good labor-management relations grew at the time of the NRA. The St. Louis market

recognized the weakness of this plan, and that industry would have to rely on its own resources whenever the act went out of existence. Both manufacturer and labor knew that cut-throat competition, so characteristic of the industry would continue. Consequently, when the factories did close and the union presented its terms, differences were quickly settled. Since that time no stoppage of work has taken place in this market. In an attempt to combat other problems common to the industry, the St. Louis manufacturers tried to interest other markets, but without success; so "persistent, conservative St. Louis" decided to do the job itself.

One of the most important features of their plan, and one still in existence is their attempt to overcome style piracy, an evil prevalent throughout the apparel industry. So famous has this program become, that many claim its authorship as it has added greatly to the prestige of the market. Now a retailer can buy any St. Louis designed garment confident that it will not be reproduced by another manufacturer within the market. St. Louis Fashion Creators register all designs in the market, every new line being sketched by the association's representative. These are then filed after checking for originality of style. Manufacturers have come to realize the full value of this system whereby pirates become manufacturers! This plan has the full support of labor which likewise recognizes that the importance of a market depends on individual and original styling. In the market agreement with the union there is a clause stating that if design piracy be practiced in the market, labor may stop work until the style is removed from production.

The first labor agreements were signed in 1933, and the following year, when labor demanded higher wages, management objected on the grounds that labor was already receiving more than management. The ILGWU carried out a series of investigations in the St. Louis market and found many manufacturers pirating styles. The union then advised the employment of individual designers who could create original designs. They also suggested that salesmen be used to travel over more territory and thus promote the St. Louis merchandise. Management took a defensive attitude to labor's suggestions until they were convinced of its sincerity. A more progressive program was gradually adopted, and implemented with an organized promotional program. Manufacturers soon realized they were working together with labor in a common enterprise, and that only by working as a unit could their market become the national center of junior styles. The industry also learned that both labor and management must recognize the importance of the consumer because their very existence depends on consumer goodwill.

Having developed a new source, a new type of design, and a way by which some protection could be afforded their designs, St. Louis went ahead to evolve a plan which was to have ultimately a profound effect on the industry and its advertising. Each individual manufacturer in the market chose a trade name and then confined his line to one retail store within a city, a method known as distribution by the franchise system. Cities throughout the nation, no matter what size, have discovered that this really is exclusive confinement. The trade name which each manufacturer has developed and built up through extensive

national advertising, has given the retailer something special on which to build his promotions. Among other special services offered the retailer with the franchise are advertising and display ideas, mat service and many suggestions which aid in making the consumer brand conscious. Franchise distribution is the reason for much of the market's success, although other markets question as to whether or not franchise distribution is the best for mass production method. It did take some time to win over the retailer, but today St. Louis brands are eagerly sought by retailers throughout the United States. They have learned that the manufacturer stands behind his brand name with consistently good lines, high standards of design, and excellent quality. Continuous national advertising of brands has assisted St. Louis fashions in becoming well known all over America, and, as the market originated and followed this plan before any other market, it has greatly benefited.

The union also suggested certain improvements in factory methods; a need recognized by both management and labor. Management readily cooperated with the union and, after careful study, methods for increased efficiency were suggested. These were slowly, but gradually adopted after management no longer felt the union was attempting to gain too strong a hold on the industry. Time has proved the sincerity of their efforts to improve industry efficiency for the welfare of the workers. The union offered training courses for supervisors and workers in scientific management, and time and motion studies, so that, today, St. Louis garment workers probably know more about industrial

efficiency than any other union group. The ILGWU supplied engineers to help in the installation of new production methods. After some time, labor-management councils were set up in practically every plant in St. Louis. As a result many manufacturers improved machinery, lighting, color combinations in the factory (colors used in factories are supposed to have a psychological effect on volume production, fatigue of workers, et cetera), and other changes requested by these councils.

At first, there was some strong opposition to the union, but gradually even non-members of the Associated Garment Industries were willing to cooperate. Today, disputes and arbitrations still arise, but these are settled peacefully by conference. Although the union is naturally on the side of labor and is anxious to improve conditions for the workers, it does not fail to recognize the fact that labor also has some responsibilities to management. Consequently, the close relationship which exists in this market between these two opposing groups has resulted in a prosperous, growing industry united in working for the benefit of all connected with it. So successful, have been the labor-management relations that this cooperative relationship is considered as one of the major reasons for the rapid growth and development of this market. A Labor Compliance Committee has been established in the market which consists of four members each, from labor and management, and an impartial chairman. This committee decides all labor disputes, and their decision is final. As their decisions do not always fall to the side of labor there has developed more complete understanding between these two factions, with a resultant cooperation not to be found in any other market.

Industrial engineering techniques in production were introduced and although in some instances there was strong opposition, they are now well established. Trained engineers are now employed in many factories and it has been found that under their direction increased production results; which, in turn, lowers costs and indirectly increases wages.

The carrying out of these plans points the path the market has followed. New experiments or ideas are constantly being developed and the policies and procedures of the market are closely watched by other cities. This group leads in advanced ideas, with management showing genius, one might say, in progressive planning. It seems that whenever other markets copy the latest production, promotional, and welfare schemes of St. Louis, still another outstanding plan originates there. The organization of a Medical Center, opened in October 1947, is typical. This center is supported by management and controlled by a joint labor-management board. All types of medical service are offered the employees, and it is hoped in the future to extend these privileges to the employee's family. Some of the most outstanding specialists in the country are retained by this well equipped Health Center.

The St. Louis Fashion Creators were incorporated in 1942 as a separate division of the Associated Garment Industries of St. Louis. It formed for the express purpose of publicity and unified promotion of St. Louis fashions. Since its inception this organization, under the able direction of Miss Joan Gardner, has been the focal point of

all market activities. The main duties of the Fashion Creators is promotion, while that of the Associated Garment Industries is to deal with labor problems. This parent association, founded in 1930, acted as a balancing employer organization against an intensive program being carried out by the ILGWU. The association gained importance during the NRA administration and by 1933 excellent employer-union relations resulted. This was the first market to carry out a wide collective agreement with the union since the Cleveland experiment. The agreement has been renewed periodically since that time. This particular association aids in bringing together manufacturers and labor, handles market problems and increases understanding between manufacturer and retailer. It is such an integral part of the market that its work and the path the St. Louis market has taken in the specialization of junior fashions, appear to be identical. The Associated Garment Industries began with definite aims which they seem to have been able to put into practice.

Although the St. Louis Fashion Industries was incorporated in 1942, it was not until 1947 that a central office was set up with the Associated Garment Industries. This promotion office is now an integral part of the market, issuing news of "young fashions" designed in St. Louis to national magazines, trade papers, newspaper syndicates, and radio stations. It also supplies information to retailers and assists buyers visiting the market in every way possible. The association has many plans for the future, which are briefly listed in order to acquaint the reader with the farsighted policies of this market.

1. Expansion of the scope of the School of Design at Washington University, which is already maintained by generous scholarships and grants from the industry.
2. Aid is to be given the various trade and vocational schools in the area in an attempt to build a labor reserve to fill the depleted ranks.
3. A special department, already set up, for research and publicity campaigns.
4. Plans for a coordinated advertising program to acquaint both retailer and consumer with the St. Louis fashion market.
5. Post war expansion in export business, as well as national distribution.
6. Plans for a St. Louis Fashion Center.

Other projects already carried out are numerous. The Fashion Creators were responsible for the organization of a costume library in the Central Branch of the St. Louis Public Library. This collection is now recognized as one of the most famous in the United States and serves as a source of inspiration and design detail for many designers.

The association has also opened a costume room in the historical Campbell House. Several organizations have fitted up different rooms in this house which now serves as a museum. The St. Louis Fashion Creators have recently opened it to the public. The Fashion Creators hope to build a costume collection which will be one of the most outstanding in the country.

Throughout their existance the Associated Garment Industries and the St. Louis Fashion Creators have worked closely with the Chamber of Commerce and other civic groups. Their leadership is outstanding and they have instituted many plans for other markets to follow.

So far, nothing has been said of the volume production and types of women's clothing manufactured in this market. The market, recognized as an outstanding junior style market also produces all other types of women's apparel. As St. Louis was the first city to interest its' manufacturers in junior styling and sizing, it was able to capitalize on a trend, recognized throughout the country. A demand for misses sizes with junior styling became evident, and manufacturers adapted themselves to this opening. Other manufacturing houses attempted to fill the acknowledged demand for half-size dresses. However, St. Louis is primarily a junior market for ninety-eight percent of the manufacturers produce in this size range. Many firms manufacture both junior and misses styles. In general, St. Louis is a medium priced market. The annual dollar volume of women's apparel manufactured in the St. Louis area is seventy to seventy-five million; forty to forty-five millions of this actually manufactured within the city.¹

Sportswear is gaining in importance here, as in most other cities. It is difficult to determine the actual volume of sportswear produced because garments in this market are seldom so classified since the market throughout, stresses junior styling.

1 Figures reported by Associated Garment Industries.

The coat and suit industry in the city is old and well established. Quite early in the twentieth century there were a number of large firms with national distribution, and their volume was estimated in millions. Today, there are relatively few coat and suit houses, and all produce a junior line. During the past six years this area of the market has seen little growth; the eleven firms, all of which are relatively small, produce annually approximately \$4,600,000.^a

An interesting feature of the St. Louis market is the presence of two large wholesale houses, which have national distribution. Ely and Walker Inc., and The Rice Stix Drygoods Company, are the only two of their kind remaining in the United States. These houses were established early in the history of the market being outgrowths of the first warehouses opened during the early settlement of St. Louis. In an attempt to compete with direct distribution methods used by the manufacturer, these firms do much of their own manufacturing, producing many lines of clothing and other types of merchandise. Integration has taken place to a great extent, Ely and Walker actually integrating back to the mill. One of these firms produces a well known line of house dresses, the other a well styled, medium priced, nationally advertised line made in women's sizes. Due to their extensive national distribution, high quality and styling is obtainable at this medium price. These drygoods houses carry on all the promotional activities used by other manufacturers.

The St. Louis market has grown considerably in both farsightedness and stature since 1939, when its volume production was little

over \$11,000,000. While it is not really a young market, it has since 1933, with its creation of junior styling, taken on a zest for youth. The manufacturers are ambitious for their market, and have a fund of ideas they never fear putting into practice. The future looks promising for this market, which feels it is becoming the world center for junior fashions.¹

¹ Women's Wear Daily, - May 26, 1942; May 13, 1943; September 21, 1943; May 10, 1944.

KANSAS CITY

Kansas City, situated in the "heart of America" is still another garment center which has shown amazing growth over the past ten years. This market grew out of a thriving mail order business begun over eighty years ago. Kansas City situated in the center of a large farming region was the logical location for mail order distribution. In the early days of the city, jobbing and wholesaling was far more important than manufacturing. Gradually as pioneers moved further westward and others settled in the areas around Kansas City, there were more people to supply with goods. This lead to an increased demand for clothing and because supplies came slowly from the east, garment manufacturing was sponsored by the large mail order houses. Coat and suit manufacturers were brought to Kansas City, under contract to these mail order houses which had exclusive distribution of the garments produced. Soon other firms began operation, either under contract or independently, and the market began its real growth. In 1926 there was a sudden expansion of this market, due to a strike of the New York coat and suit industry. Buyers, desperate for merchandise came to Kansas City and other coat producing cities from every section of the country in an attempt to fill their orders.

The wash dress market began quite early, but this has since developed into the "silk dress" industry. No doubt the earliest firm in this branch of the industry was the Donnelly Garment Company which today has nation wide distribution and recognition. Organized as early as 1916, as a home industry enterprise, it later developed into one of

the largest wash dress firms in America. with a volume production of many millions of dollars. With its recently built modern factory this firm adds considerably to the stature and importance of the Kansas City market. Thirteen hundred people are employed in this one plant which is well advanced in scientific methods of production.¹

It was in the late thirties that the market began to show steady growth and to receive national recognition. The market association, even at this time, carried out a great deal of advertising and publicity in trade and fashion papers. In the first years of World War II, Kansas City received many large government contracts, primarily because of the advanced production methods used in this market, so eminently suited to large volume production. Frequently, production and other executives of the Kansas City garment industry were called to Washington as consultants for setting up factories and solving many production problems. These factors added greatly to the prestige of their market. Because of the shortage of supplies during the war, the market found itself being visited by more buyers than ever before. These buyers returned time and again after discovering the quality and quantity of the goods available.

In 1943, the first truly nation-wide promotion was planned and put into effect, in an effort to make the consumer conscious of the importance of Kansas City as an American garment center. It also aimed to develop coast to coast distribution, instead of limiting themselves to mid-west distribution.

1 For further information see "The New Look at Nelly Don's", Fashion Topix, Vol. 2, November 1947, pp. 17-38.

Kansas City manufacturers generously give much of the credit for the development of their market to Louis Fairchild, as he realized the importance of the garment industry to the city. News coverage of the market by Women's Wear Daily, contributed materially to its improved national status. This is a service offered all garment markets of any importance, and smaller ones desirous of carrying out active promotion.

Most Kansas City manufacturers feel their importance is determined, to some degree, by the geographical situation of the city. It is in the center of a large distributing area, there being many thousands of small retailers who can be supplied overnight from this market. This, combined with the increasing national distribution being built up by individual manufacturers, points to a satisfactory future for Kansas City apparel manufacturers.

This market has an excellent reputation for the quality of workmanship of the goods produced there. The market is stable and has sound financial backing. These factors, together with reliable deliveries and precision methods used in manufacture, add prestige to the market. In spite of modern efficiency in production methods, manufacturers do produce attractive, though not high styled garments. More emphasis is, however, being given to styling, since the establishment of the fashion market.

The Kansas City manufacturers do not propose to enter any specialized field although coat and suit production is perhaps more important than the dress industry. Attempts are being made to present a truly

mid-western style as this market caters mainly to the demands of the small mid-west retailer. An attempt has been made to prevent style piracy and when this is successful, no doubt, a characteristic style will evolve as designers will then really be creating for the needs of the mid-western people. The market has never been known as a style center, but over the past few years styling has definitely shown considerable improvement.

There are twenty-eight dress firms in the city producing a volume valued at \$18,569,000 annually.^c The greater number of these houses manufacture in the medium priced line. In Kansas City, as in many other markets, large quantities of dozen priced dresses were manufactured before the recent war, but increased costs have caused conversion to the unit dress. A number of very large, modern, scientifically run factories in the market add to its status. Sportswear, as in all other markets, is growing in importance. About ten manufacturers produce an annual volume of \$2,700,000. Some of these firms also make dresses.^a

The feminine coat and suit industry in Kansas City has seventeen firms producing approximately \$7,500,000 annually.^a Several of these are very large, producing over one thousand coats or suits daily. There has been a steady growth in this branch of the industry over the past few years to place the market eighth among the major production centers. This development is natural as the coat and suit industry was first established about 1900, although half the firms have only been in operation for approximately five years.^d

Kansas City manufacturers attribute much of their success to the improvement, and use of the sectional method of production. This method was used quite early in this market, because of the lack of available experienced labor. Today the entire market operates on this system, which has been the saving feature of all the Mid-West markets. Kansas City manufacturers claim the honour of being the first to introduce this method of production, and for some time the city was termed the market of "modern methods". The author has not been able to ascertain the accuracy of this claim, but there is no doubt that this market was the first to use the system extensively.

Kansas City, as most other Mid-west markets, was built by salesmen traveling to the retailer in other states, to obtain sufficient orders before the manufacturer's line went into production. In this way some of the gamble was taken out of the garment industry, because it allowed for long range planning and steadier employment of labor; two things of great importance to markets far from sources of supply. Actually, these difficulties have benefited the regional markets as they make long range planning essential and efficient production methods result. Kansas City is proud of the fact that there are no contractors in the market. Manufacturers feel that this is another reason for their success, as it allows for control of quality, because production can be more carefully watched. This market has shown a steady growth from pre-war days. During the war it expanded to a volume of between fifty to seventy million dollars, as

against thirty million dollars in 1940. A figure of ninety million has been predicted for the 1950 volume output.¹

The Kansas City Apparel Association was formed as early as 1931 but limited membership made national market promotion difficult. There are now about sixty members and the association is actively promoting the market. A great deal of constructive work has already been carried out. Extensive promotion in Women's Wear Daily, and other national trade and consumer magazines, has been responsible for much of the recognition now afforded the market.

Working with the market association leading Kansas City retail stores feature local apparel manufacturers for a week every year. This has been an effective promotion in making the consumer conscious of the market in their midst. Tying in with the American Royal Show, the association sponsors a fashion show at the Municipal Auditorium, thus enabling many thousands of consumers to see the work of the local garment houses. Both these events have a definite effect on sales.

The Kansas City Apparel Association sponsors a School of Design at the Kansas City Art Institute. This school offers excellent instruction in this field and its curriculum is widening in scope. Vocational training schools are also supported by the manufacturers, in an attempt to increase the supply of trained labor.

Perhaps the most ambitious project of the market and one of which it is very proud is the publication of the monthly periodical Fashion Topix. It was first issued in the fall of 1946, and has continued successfully ever since to report the story of the Kansas City manufacturers and their merchandise.

1 Women's Wear Daily, November 10, 1944.

All merchandise sent out by members of the association is designated as "Fashions for the Middle Millions" which appears on a special consumer tag. This tag has achieved much publicity for the manufacturers. This slogan was chosen as most typical of the merchandise styled in the city. Garments produced in Kansas City are medium priced and styled to suit the majority of people living in the Mid-west. They are not highly styled nor sophisticated, but suit the more simple requirements of the majority of these people.

In the late summer of 1948 the Apparel Association arranged its first convention for the retail buyer. This was the market's most ambitious and successful effort to draw buyers to the market. The convention was held at a time when no new lines were shown. Many interesting panels of utmost value to the buyer of the small retail store were held. Throughout the Kansas City market one feels that the manufacturer, although seeking national distribution and recognition, is conscious and desirous of filling the needs of these retailers who are responsible for the bulk of the market's volume.

The union has played no small part in the story of this market. It has assisted management to install scientific management methods of production and is responsible for numerous other improvements in the industry. Since the union's organizing of all but the Donnelly Garment Factory, labor-management relations are most satisfactory.

Kansas City is an interesting market to watch. Although lacking the glamor or novelty of the specialized markets, it does fill a need in garment production, and shows every promise of growing to claim a

sizeable part of the nation's volume. The market is more progressive since it became unified. There is some talk about carrying out a scheme somewhat similar to that of Apparel City in San Francisco, because the organization and size of the Kansas City market makes it a "natural" for such a plan. No doubt, if this plan were carried out, the market would assume greater importance. The market is not "a sleeping giant"^b it is bound to develop considerably with the next few years.¹

1 Women's Wear Daily, February 26, 1943; July 23, 1943.

SAN FRANCISCO

San Francisco is the most sophisticated city in the United States and its women are among the best dressed. Although most of the glamour and excitement of California belongs to Los Angeles, the cosmopolitan atmosphere of this city has had its own special influence on California clothes presented by San Francisco manufacturers.

The story of apparel manufacturing in San Francisco begins, as in Los Angeles, with the great influx of gold prospectors one hundred years ago. In 1850, Levi Strauss¹, whose story is almost legendary in the market, introduced his now famous "Levi's" and work shirts, making the former out of heavy fadeless denim which he had brought from the East for the manufacture of tents. He manufactured work shirts and Levi's because he learned those available were unsatisfactory. There was a great need at this time, for ready-to-wear and second hand clothing, as there were still very few women on the coast who could repair or sew clothing in the homes. There was some manufacturing but this was mainly by hand by Chinese labor.

When the industry began in the west, clothing was purchased without any great regard for quality. However, it was difficult to establish a flourishing industry as neither labor nor consumer were steady. The first census which reports apparel manufacturing in San Francisco is of 1861, when the manufacture of shirts was being carried on. Fifteen years later the contracting system was in operation and there were nineteen shirt and nineteen clothing manufacturers in the city.

1 See "The San Francisco Story", Manufacturers and Wholesalers Association of San Francisco.

In 1906, the year of the great fire and earthquake, numerous factories were destroyed. Many manufacturers set up temporary manufacturing quarters in smaller towns to supply the demand for clothing which naturally resulted from this disaster. No permanent factories were built, as manufacturers were doubtful of the position clothing would hold in the industrial and economic organization of the reconstructed city. Consequently, no modern factories were built, but most were constructed with provision for sufficient light and air, and, to some extent, for the comfort of the workers.¹

Through the years which followed the market showed consistent growth. Both men's and women's apparel were manufactured, though men's wear was, for many years, dominant. Today, women's apparel production accounts for over sixty percent of the city's total output.

As in Los Angeles, sportswear is the most important item manufactured in the market. All kinds of sportswear are made by the city's thirty-five manufacturers, whose total annual volume output is approximately \$20,000,000. The street dress is also produced in some quantity, valued at \$12,000,000 annually. The market has shown considerable progress since 1939, and it has a great future predicted.²

As a feminine coat and suit market San Francisco is assuming a position of some importance. It now ranks fifth largest in the country. It is interesting to note that the total women's wear production for San Francisco in 1939 was but little over \$6,000,000, one third of this being the contribution of the coat and suit industry with the emphasis on medium priced merchandise. Today, this branch of the

1 Palmer, E. op. cit.

industry alone produces over a fourteen million dollar volume. This boom only occurred in the last five years.^d

This market is known for the high style merchandise it produces, a feature eminently suited to the cosmopolitan, sophisticated atmosphere of the city. A few couturier designers are beginning to operate in the city, which adds to the prestige of the market. However, considerable quantities of work clothes and sportswear are manufactured in the popular and medium priced lines.

The San Francisco market has always had an active market association having done much to make the nation conscious of its apparel industry. This association, called the Manufacturers and Wholesalers Association of San Francisco was formed about 1920, having as its main objective the planning of coordinated market weeks to attract buyers, who were offered sales clinics and other services. Originally there were more jobbers than manufacturers in the market, but this situation has long since been reversed. Today, this association has a total membership of 175. The association works closely with the California Apparel Creators¹, though it is an entirely independent association.

To anyone who has any knowledge of the garment industry, Apparel City means one of the most important and outstanding experiments in the history of the industry. Recognizing the need for expansion of manufacturing facilities a plan was devised by the association which has resulted in the development of the San Francisco market being closely watched by others throughout the country. The plan for Apparel City was originated in 1943, and already over thirty-four manufacturers are

1 The headquarters for the California Apparel Creators is in Los Angeles. Many San Francisco manufacturers are also members.

operating there. The project is gradually nearing completion, and, when finished San Francisco will rightly be able to call itself the market with the most modern of facilities for both manufacturers and buyers. The idea behind the building of Apparel City was that the industry should be able to build "out" instead of "up". This was unorthodox, and it was some time before the five million dollar project could be promoted. However, as people were won over, the plan gradually evolved. Stock was subscribed for by active members of the association and some was bought by the ILGWU who realized the great value of this project to the workers, in that excellent provisions were being made for their welfare.

The builders of this market are ambitious, but no doubt many of their objectives will be accomplished. A thirty-four acre trailer camp was bought and plans were drawn up for thirty-two buildings with a total of one million square feet of floor space. These buildings, a number of which are already constructed, are painted in different pastel colors. They are from one to seven stories high, although the majority are one story with a mezzanine in the front for offices, showrooms, and frequently the designing rooms. The buildings are arranged to orientate the site and to make the most of natural lighting. Some of the factories already operating in the city have found it necessary to block out some of the natural light and use fluorescent lighting already installed in the buildings. The buildings are air conditioned all year round. At present thirty-seven manufacturers operate from Apparel City.

Many other facilities are provided in this "city within a city", though relatively few are yet in operation. Because of its distance from the main shopping area a service center is to include, among other things, beauty salons, doctor's and dentist's offices, dry cleaning facilities, drug stores, service stations, delivery services, a travel bureau, etc. All will be needed as Apparel City, when completed, is to have working space for ten to fifteen thousand workers directly engaged in the apparel trades. There will be many other employees who will constitute a part of Apparel City's population.

Recreational facilities to be provided in Apparel City include a spacious swimming pool, for use by employees. It will also be used for elaborate fashion shows staged by large swim suit firms who will have space in the finished city.

The administration building, when constructed, will be a seven story building, and will contain offices of sales representatives and buyers for the larger firms of the country. Trade organization and administration offices, attractive display rooms and facilities. will be found here. The Celanese Auditorium is to be constructed in the center court of the "city". This auditorium is being built by the Celanese Corporation at a cost of \$250,000. It will have complete broadcasting and television equipment, and is to seat one thousand people. It will be the center of all market activities, being used for style shows, all major meetings, educational and other activities. Much of this is still an architect's dream, and, as the city takes shape, some plans are altered, so that they will be more practical.

When completed Apparel City should accomodate about one hundred manufacturers and sales offices, as well as space for buying and service offices of the nation's leading firms. The ground space allows for further expansion of a quarter million square feet.

Outstanding advantages accrue to the market from the development of this plan. Perhaps the most important aspect of Apparel City is the improvement of working conditions for the workers who have been given much thought in its planning. Conditions are ideal as far as the worker is concerned, and already remarkable production efficiency has been demonstrated. Many skilled workers are being attracted to Apparel City; for labor, working a thirty-seven and a half hour week with an average weekly wage of forty-five to fifty-five dollars, has already reacted most favorably to the project. Overhead costs are greatly reduced for management as the rental is low on account of the location of the market. Fire insurance, generally high in this industry, is nominal in Apparel City because of the complete fireproof construction of the buildings. Many other overhead costs are reduced as greater control over production is possible in these one floor factories, scientifically planned with the help of industrial engineers.

Apparel City is beginning to receive national recognition as a style and buying center. This amazing project has been publicized in most fashion and trade publications and to consumers through feature stories in newspapers. To trade and consumer alike, Apparel City has been promoted as an important center for California styled men's,

women's, and children's apparel. The Celanese Corporation, which has taken such an active interest in its development, plans to sponsor classes in design and manufacturing methods. City schools are cooperating with the industry in instituting training programs to provide trained operators.

At present there are about forty firms operating in the market, this being about thirty percent of the existing market. Many large manufacturing concerns are waiting construction of additional buildings so they may move from their present restricted and outmoded quarters. Apparel City hopes that nationally known firms from other markets will also locate and manufacture there for western distribution. Already many such firms have made inquiries about the possibilities of obtaining factory space when it is available.

This project shows a remarkable cooperation among the local manufacturers. The instigator and founders of Apparel City, and the members of the industry who have so enthusiastically taken part in this unique venture, should receive nothing but praise for the development of this "city within a city", which provides centralization of all the needle trade operations in the city.

Total sales in the San Francisco market have greatly increased since the opening of Apparel City, although all is not entirely attributable to the project; for a general growth took place in all apparel markets during the war. However, statistics show that, in 1939, the total sales in the market were \$10,000,000. In 1946, with Apparel City but half finished they were \$16,000,000. In the short period in which

Apparel City has been in operation, there has been an increase of fifteen percent in production due to the simplified factory layout and modern production methods.¹

This project is alone sufficient to make San Francisco one of the most discussed apparel markets in the country. It has been visited by numerous American and overseas manufacturers, and government representatives who are anxious to study the plan, organization, and administration of Apparel City. The buildings will not be completed for at least four or five years, so meanwhile a great deal is still in the planning stage; and as the project progresses improvements and changes continue to be made. This development has given the San Francisco market individuality and no longer is it considered a part of the Los Angeles market.

It is being asked if Apparel City makes the San Francisco consumer more conscious of the manufacturing being done there. It is surely impossible for anyone in the city not to know of this outstanding industrial experiment which has materialized out of the dream of one of the leading figures in the industry. However, if this project alone has not stirred interest among the citizens of San Francisco, an outstanding event sponsored by the Manufacturers and Wholesalers Association of San Francisco must surely have. The now famous "Flight to Paris" is probably the most talked of and daring promotional event ever carried out by any branch of the American apparel industry. This event received much publicity and has had some interesting results.

1 Holland, L. M., Apparel City, San Francisco's New Apparel Manufacturing Center, San Francisco Chamber of Commerce, 1947.

This visit was arranged by the Manufacturers and Wholesalers Association of San Francisco, which for the past twenty years has carried on an intensive promotional program. Their aim has been to develop the market as a fashion and style center. Since this paper is, to a large degree, stressing the promotional activities in the different markets it is permissible to say more of this trip. The market gained wide recognition and publicity throughout the entire world when it carried out its most ambitious promotional activity. Fashion history was made when the San Francisco market held its advance Spring showings in Paris in the Fall of 1947. This event obtained millions of dollars of free publicity for the market. There are, eighteen months later, still repercussions from this visit. Neither trade nor consumers have forgotten, nor have they been allowed to forget, the event and its results. This promotion certainly made the American consumer, as well as, the retail buyer, conscious of the growing and important San Francisco apparel industry.

This Paris visit was arranged with the cooperation of the California State Department. The French Government also welcomed the idea because they saw the possibility of creating American demand for French fabrics and accessories. In San Francisco the plan soon became a community affair, retail stores, civic groups, businesses and industries of all kinds cooperating till a feeling of intense excitement permeated through to the consumer. Over \$800,000 were raised by the association, \$5,000 being donated by the city for financing the promotion.

Sixty-three people, including manufacturers, models chosen by consumers in a contest organized by the San Francisco News,¹ and press representatives from all parts of the country, flew to Paris where they presented the most lavish showing ever seen in Paris. A repeat performance of the showing was given in San Francisco a week later.

The Parisian designers were at first somewhat wary of the San Francisco venture, but when they realized that the two industries were entirely different they generously praised the American designers. The fit and cost of American mass produced garments were the two things which most impressed the French. Buyers came from many European countries, and although no orders were taken many requests were received. This event was not an attempt to compete with Paris but merely to show that American designers were capable of doing, and to encourage a free flow of ideas between the two countries. If so much could be achieved by one market, what could have been done had the event been sponsored by the entire garment industry.

As an outcome of this visit many special promotions have been possible. There are hopes for a reciprocal showing of Paris fashions in America. Already a "trade treaty" has been signed for the exchange of styles between couturiers in the two cities. By this agreement California apparel manufacturers are given access to French fashion ideas in advance of their world release, not for reproduction but rather for inspiration. The San Francisco market feels that this may

1 San Francisco News gave generous backing to the market and published day-to-day coverage of the event. This information was later published as a pamphlet entitled, From Union Square to Place Vendome. 1947.

"bring them one step nearer becoming the "Paris of America".¹ Members of the San Francisco market pay a fee to visit, consult, and exchange ideas with designers such as Dior, Balmain, Fath, and others. A "fashion passport" is received by each participating San Francisco manufacturer, who may in turn use this for advertising on his brand labels. San Francisco is proud of this arrangement, but it seems to the writer that this could lead to too great a dependency on Paris inspiration, which is no longer essential for the American designer.

Arrangements are being made for an exchange of students between Paris and San Francisco. This allows about forty French students to come to San Francisco to learn American mass production methods, and an equal number of future American cutters and designers to study under some of the famous Parisian Couturiers. This plan developed from information that there are already forty ex-servicemen studying at the Chambre Syndicale de la Couture Parisienne where a five years apprenticeship is offered. Both countries should greatly benefit from such an arrangement.²

Another feature of this market is the awarding of fashion "Oscars" the first presentation having been made in 1946. The Manufacturers and Wholesalers Association of San Francisco award these for outstanding contribution to the San Francisco apparel industry. Radio commentators, fashion editors and civil authorities have been among the recipients of this award. These are generally presented at one of the market showings or press previews.³

1 Manufacturers and Wholesalers of San Francisco,
News Release, January 13, 1948.

2 Ibid.

3 News Release

An arrangement has been made for local manufacturers to hold a spring showing with the West Coast Salesmen's Association. This means that over one thousand lines will be available to visit-buyers. If this cooperative market week is successful the intention is to continue the arrangement as it will undoubtedly bring many more buyers to the market.

This resume of some of the more important events originated by the Manufacturers and Wholesalers Association of San Francisco gives some idea of the ambitions of the leaders of this market. They have received a great deal of criticism for their spectacular projects which are, indeed, somewhat surprising when the position of San Francisco as an individual apparel market is considered. However, production has already shown a tremendous increase, and buyers are evincing more interest in this market which is developing a styling quite distinctive from that of Los Angeles.

Within another five years, with Apparel City completed, San Francisco will probably become one of the most important markets in the country. It has, of course, with the Los Angeles market great possibilities for expansion on account of its strategic geographical position as regards the Pacific. There are thousands of retail outlets not yet contacted in the many countries of the Pacific, so when trade in these areas does open up, there are indeed great possibilities for expansion of the west coast markets.

LOS ANGELES

No doubt the most spectacular of the markets to be discussed is of Los Angeles, a city which has become part of the California legend. It is this legend of color and glamour and "the California of life" that are responsible for the great popularity offered California apparel in the past twenty years. The growth of the market is the story of many successful achievements, with a resulting story rather different from that of other apparel manufacturers.

To have a real understanding of California fashions it is necessary to know something of the climate and their way of life, as these have been responsible, to a large degree, for much that has happened in California styles. Unlike other large American cities, few people live in apartment buildings. This means that the city is spread out permitting greater freedom of living, out door living so characteristically Californian. Patio life, open air picnics, barbeques, swimming, tennis, all become an integral part of this California dream. The characteristic, intimate outdoor social life develops a friendly informal manner among young and old alike. Every imaginable sport, including winter sports, is a part of the California manner of living. This has created demand for all types of sports clothes which are functional and suited to a casual way of entertaining and the informality so characteristic of this area.

And so the "intangible what" that makes California fashions demanded throughout the nation are the many things which may be summarized as:

"Cabrillo and the bucaneer Drake; the padre, covered wagon and miner; adobe to glass houses, patio, swimming pool, sports and fun--California's heritage of historic romance, its early history and way of life--the sunshine and sea, mountain and desert--all these sum up California fashions as being 'just California'."¹

All of these things have become a part of the California apparel story. There are, of course, factors other than the climate, traditions, and manner of living which have contributed to the prestige of California as the leading sportswear market in the country. The California consumer herself has helped in its establishment. No matter from what part of the United States a Californian has come, she is always willing to buy and wear something new and different and is not afraid to break with tradition. The manufacturer is likewise flexible, and is constantly striving to produce something different, either in design or fabric. This is sometimes stressed, but it is noticeable that more manufacturers are producing classic garments with a definite California feeling. The growth of the California market has been aided by leading retailers who have encouraged individual designers and manufacturers, and always promoted California produced clothes. The proximity of Hollywood and the movie industry has significantly popularized California fashions throughout the country. A new empire is springing up in the west, and the outstanding increase in population has made it economically feasible to expand apparel production. Possibilities for further development are unlimited.

1 The Romance of California Fashion, unpublished report, California Apparel Creators.

Before discussing in detail the apparel industry today, it is relevant to briefly mention the early production of clothing. As elsewhere, jobbers supplied the requirements of the retailers in the city. By 1890 the first clothing factory had begun to produce work clothes, shortly afterwards another firm was manufacturing suspenders and overalls. Thus began a competitive market in the men's wear industry. Jobbing houses increased, but it was only in 1910 that the first women's dress factory was opened.

California really began as a men's sportswear market. Shirts were among the first items manufactured in Los Angeles. Due to lack of laundry facilities in the city, someone devised the idea of designing a shirt with the collar attached. At the time it was not realized that they had created a design keyed to a manner of living already prominent in California. These were the first sports shirts made in America. By 1910 they had been widely accepted and they were further popularized in the movies. The tremendous growth and promotion of the film industry during World War I indirectly publicized California clothes.

In 1915, the women's dress industry was established. Joseph Zukin has been given credit for this. He manufactured tailored shirt waists for women, selling first in San Francisco and later in other cities, he built a national market for his well styled, eagerly accepted designs. Other blouse manufacturers soon began operating in Los Angeles. By 1920 the blouse industry was no longer profitable due to the growing popularity of the one piece dress. The versatile manufacturers soon created the casual dress for which they today enjoy an enviable reputation.

In the twenties the trend toward outdoor living increased. Beachwear, active sports clothes, and the playsuit became general wear. Tourists visiting Los Angeles, seeing these casual clothes worn by the business man and his family, tried them while on vacation and introduced them to the East on their return. Gradually a demand for this type of sportswear increased, orders coming from all sections of the United States.

In the 1930's California was responsible for a style revolution, which is only now abating. Slacks were introduced as a fashion item, popularized on the screen and still later became an accepted fashion. They retained popularity for twenty years. It is only since their excessive use during the war that women have tired of this masculine type of apparel, and appear to want more feminine sportswear. While the fashion lasted it increased the demand for styles from California.

In 1932, the Olympic Sports were held in Los Angeles and visitors came from all parts of the world. As a result, California sportswear received a terrific "boost", being much in need of it during this period of nation-wide depression. This event promoted California merchandise internationally. Gradually retailers throughout the country began to recognize that there was something unusual in the merchandise of this market enabling it to rise above adversity.

To have a full understanding of the women's apparel industry in California, it is essential to know something of the designers who are responsible for the special character of designing distinguishing this market. Los Angeles is acclaimed, the world over, as the top sportswear

market. To receive this ovation it has had to produce designers who are "ingenious and uninhibited". They design clothes essentially for the California living, functionally beautiful, simple clothing, readily recognized by its styling and color. Many of these designers have been responsible for the introduction of new and unusual ideas, a factor which has undeniably influenced the rapid growth of this market. They may rightly be called an integral part of California apparel history.

The Affiliated Fashionists of California have been large responsible for the outstanding reputation of the Los Angeles market. This group consists of Peggy Hunt, Mabs Barnes, Addie Masters, Louella Ballerino, Agnes Barrett, Viola Dimmett, Marjorie Montgomery and Irene Bury. To each designer are assigned many of the "firsts" for which California is so famous. All of these women are designer-manufacturers, that is, they manufacture their own designs in their own factories. None of these firms are quantity houses, and this again is characteristic of the California market.

Due to the difficulty of obtaining fabrics from the eastern markets in colors and designs suitable for the California market, these designers requested new fabrics to be designed and created, in this area. Apart from the use of unusual fabrics, innumerable new and unusual ideas have been launched by these designers as well as by others. There is not a leading manufacturer in the city who has not at some time introduced at least one salable idea. Among these California "firsts" are the backless bathing suit, the broomstick skirt, the topper jacket, and pedal pushers.

California Designers telling the story of these women designers and other leading clothing manufacturers, was distributed by the California Apparel Creators at a press week in 1948. This, and California Fashion Explorers, written by the Los Angeles Fashion Group, give an excellent idea of who and what make the California market so individual.

Although some doubt the influence and importance of the movie industry on the Los Angeles market, it can be stated that the film designers have had a profound effect on design. It has been through the films that acceptance of the styles designed for and worn by movie stars has come. Many designers for the film industry are well known for their couturier designing. Several have entered the wholesale manufacturing field. Outstanding among these are Adrian and Irene who design only high priced lines. As the apparel discussed in this paper is in the popular and medium priced lines, these high style designers are of importance only insofar as they add to the prestige and development of excellence of design within the market. Through their originality they have inspired many manufacturers. There are a large number of couturier designers in Los Angeles, who work, mainly in Hollywood and Beverly Hills, where they cater to the film colony and Los Angeles socialites. They net a very low percentage of the total volume production in the market, and so are of no great significance in this respect. As internationally recognized designers they do add, however, to the prestige of the market. The strength of the market lies in mass production, but there must be, in such a system, some high style inspiration. However, in the California market this is not as important as in the New York

market for, in Los Angeles. every manufacturer, however small, prides himself on the fact that he has his own designer.

For many years the men's wear industry was more important to the market; but today, the women's garment industry is well in the lead. It is in the sportswear field in both industries, that Los Angeles has so justly acquired fame. The California manufacturers have learned to cut and design sportswear which is the most distinctive in the country, although Dallas and more recently Miami are now also receiving recognition. California aims to be the sportswear style center, not only of America, but of the entire world. The glamor of California and all it stands for is behind the market. This does help to sell merchandise but manufacturers are beginning to wonder if this angle has been overplayed. However, through an extensive promotional program carried out by this market, it does maintain its individuality. Manufacturers have been more interested in creating original and unusual clothes than in building large volume producing firms. Successful competition in the production of sportswear has lessened its importance within the last five years, but has helped in some respects to stabilize the seasonal fluctuations in production within the garment industry.

Prior to 1939 the California apparel was "growing up", but now ten years later it is one of the nation's acknowledged top markets. Between 1935 and 1943 volume production increased 467 percent, and since that time there has been steady growth. This intensified demand for California fashions has not been entirely due to war developments and increased population in the west, but also to a nation wide acceptance of their

functional and distinctively designed styles. The desire for them has even spread beyond national boundaries as several South American countries import California styles. They are also to be found in Sweden, England, Alaska, and even in Russia. Further expansion is only limited by world trade conditions.¹ Several California manufacturers are operating their own plants in Australia and New Zealand. A corporation has been formed with each firm operating its own plant. The overseas agents work on a franchise basis but each California manufacturer has direct control of the styling, sizing, and advertising. Some styles are released in both countries at the same time; but generally, because of the reverse seasons, New Zealand and Australia benefit from the experience gained by advanced sales in America. A rigid check is kept on quality, samples being sent to America every three months. A diversified group of manufacturers has formed this corporation; Cole and Zukin, both of California, Joyce Shoes Inc., and two firms who manufacture children's and teenage garments, and toddler's clothing.²

In Los Angeles there are over 350 houses, manufacturing all kinds of sportswear producing an annual volume of \$180,000,000. Knitted sportswear adds another \$7,000,000 to this figure. Every possible type of sportswear is manufactured in this market; and the garments of many straight dress, and coat and suit firms, are classified as sportswear by the retail buyer because of their functional styling. The dress industry, which covers all types of dresses has more than 125 firms who are responsible for the distribution of over \$37,000,000 worth of

1 Ibid.

2 Women's Wear Daily - March 5, 1947.

merchandise annually.^a

Few manufacturers have large factories as Los Angeles is more of a style market than other regional markets. Approximately fifty percent of firms in the market have an annual production figure of no more than a quarter of a million dollars.^c Another reason for the predominance of small firms is that almost half the firms in the market have not yet been operating even five years.

The coat and suit industry in Los Angeles is also of growing importance. About 170 firms are producing a volume of more than \$32,000,000 each year. Most of this volume is manufactured in the medium priced line. As is the case in the dress industry these firms are young and small, but progressive. This market does have one of the larger and more famous suit houses in the country.^c

Many other types of women's apparel are manufactured in Los Angeles, several of which also come under the general classification of sportswear as robes, hostess gowns, and negligees. Intimate apparel and accessories are also manufactured.^b

Los Angeles has become in the past twenty years an important seller's market as manufacturers avoid producing staple merchandise which buyers can obtain in the eastern markets. They continue to produce their individual styling now expected of the Los Angeles designers and manufacturers, who are confident they can retain their leadership in the sportswear styling.

The first association in the market was formed in the 1920's when a door to door campaign was made to interest the local manufacturers.

The organization formed is known today as the Associated Apparel Manufacturers of Los Angeles. In 1943, the California Apparel Creators Inc. was formed as a branch of the Associated Apparel Manufacturers of Los Angeles for the express purpose of promoting the market. This was the first unified effort of the market, although the parent association had done a little collective advertising since its formation. As early as the thirties this market took a section in Women's Wear Daily, beginning as a single page, to grow to one of the most extensive in the paper. The Fairchild publications opened a special west coast office as soon as it recognized the importance of this market and its place in the national industry. Increased coverage by this trade paper really parallels the growth of the market itself. Many fashion magazines also have important regional offices in Los Angeles. Charm magazine in 1941 was the first to open an office in the city. Others followed three years later.

Since the formation of the California Apparel Creators Inc. market activities have been accelerated and one of the most promotional minded organizations in the United States has resulted. The association unites all branches of apparel, there being some seventeen different groups with a membership of over three hundred. Some members are not directly connected with the industry, but are vitally interested in its development. The formation of the association was a post-war measure, in an attempt to meet the activities of some of the lesser markets also operating in the sportswear field.

Year-round publicity and promotion of the market has been carried out since the inception of the association. Because of the colorful

background of Hollywood, California has received greater publicity than any other single market in the United States. California merchandise spells "magic" to people from every corner of the earth. Manufacturers admit that no one person can really lay claim to starting the vogue for sportswear, for it grew naturally out of California and all of their promotional activities are keyed to this vein. As other apparel markets commenced extensive consumer advertising campaigns the association also increased trade and consumer advertising. Space in trade papers was increased to promote the products of the local manufacturers. All advertising is checked to conform to certain requirements, the chief one being that California must appear clearly on every advertisement. News releases are supplied to fashion editors of newspapers and fashion magazines about important happenings in the market.

Indirect, but valuable publicity is obtained by using film and radio stars to model California clothes, and supplying clothes for publicity photographs of young "starlets". Although the manufacturer's or designer's name never appears in the film magazines, these photographs bring hundreds of inquiries as to where the clothes are available. Publicity for this market is also achieved through various films made of their market shows and released throughout the world. The film studios, however, also work with other markets. Monogram Pictures Inc. recently made a colored film of the West Coast apparel industry which was distributed to stores all over America. A shorter film was also made for public exhibition theatres.

National press weeks are held three times annually during which time press representatives are entertained by both association and

the individual manufacturers. Elaborate showings, for which the market is now famous, present the picture of the market. Much space in the local newspapers is given to the Los Angeles manufacturers and their designs. The recent Mid-winter supplement of the Los Angeles Times devoted one section to the local market and invaluable publicity was achieved by its distribution.

In 1947 an extensive national consumer advertising campaign was planned. Life Magazine was the medium for a great deal of this, a series of full page advertisements appearing in the magazine. This publication has become an important factor in market promotion as it has one of the widest circulations of any magazine in the country reaching all classes of consumers both here and abroad. It devotes considerable editorial space to "what's new" in fashion and the work of many California designers and manufacturers has been featured in recent years.

All advertising and publicity carries the slogan "A California Creation" which also appears on the hang tag used by every member of the association. This has been a very valuable promotional device. Many other markets, especially the New York market, realizing the value and saleability of the word "California" have used similar hang tags, inferring the garments come from California. As a result Los Angeles manufacturers have engaged in litigation in an effort to protect the use of "California" and confine it to their own market. They have been unsuccessful in this, as apparently no claim may be made to a geographical area.

An effort is being made by the California Apparel Creators to encourage California minded stores and assist in the establishment of California shops and special departments. This has been done in several ways. A window display contest was held for the use and arrangement of California Apparel Creators' merchandise. The results were incorporated in an outstanding promotion book, which has been distributed to thousands of retailers. The book is filled with numerous suggestions, illustrations and photographs of how displays and shops may be set up. It is of especial value to the smaller retailer. Most stores run a California promotion two or three times a year, and the Creators do all they can to provide them with new ideas, encouraging them to display California clothes against California scenes.

Los Angeles retailers have, from the beginning, been very cooperative. This is, of course, essential for the rapid development of any market. Many of the leading stores in the city recognize the outstanding contribution made to the apparel industry by the California designers and manufacturers. They realize, too, that sportswear departments have been built on, and become successful because of, quality apparel designing. The retailers have always been ready to promote new and radically modern ideas, and having found it financially successful they are willing to try again. They have given much encouragement, as well as, financial backing to some of the city's leading designers and manufacturers.

Because of repeated requests from buyers for fashion trends, prices, and information relative to the market and its activities, the Creators,

in order to assist the individual manufacturer and assure accurate information, formed the News Bureau. Reporters obtain daily information from the manufacturers either by telephone, or by "shopping the market". All publicity issues from this office. A bi-monthly paper is issued by the Creators. In order to further accomodate the buyer, a market representative assists in locating the merchandise desired and makes appointments with the manufacturers. This representative knows what is available in the market and thus renders service of considerable value.

A code of practice within the market has been built up, and attempts are made to minimize style pirating through the use of some form of registration of the original design. Certain standards have also been set as to trade allowances and discounts.

The industry sponsors the School of Design at the University of California, Los Angeles. They presented the university with \$10,000 when the school was opened. Further support is planned as both college and manufacturers realize that closer cooperation is necessary if either are to obtain the maximum value. The association has also coordinated fashion shows for the opening of apparel design schools at Whittier State College and the East Los Angeles Junior College.^b There is close cooperation with the Frank Wiggins Trade School, where many of the city's leading designers received their training. Power machine operation is also taught here, which helps supply badly needed, trained labor. During the war five hundred to a thousand needle trades workers were brought, through the assistance of ILGWU, from New York to Los Angeles.

Most of them have remained and others have followed, enticed by excellent working conditions, high wages, and the lure of California itself. This market did not suffer as great a loss of labor as other markets, because during the war workers were either aliens or over age; so few were lost to the heavy, wartime industries.

The resident buying office has done much to aid in market growth. The first buying office opened in 1932, and today there are about ninety such offices, having increased to this number during the war years. Veterans in the industry feel that this is too many for the size of the market. Numerous New York and Chicago offices are represented in Los Angeles, as well as representatives of leading chain store organizations and retail store groups. In addition to these, there are buying offices peculiar to the Los Angeles market. This latter group, especially, has in many ways assisted in directing the trend of the market; inasmuch as they encourage new, small manufacturers and unknown designers. Much of the merchandise sent to clients is obtained in this way, and so it can be said to be a merchandising experiment.

Perhaps the most important factor which has affected this market is the altered attitude of textile firms. When Los Angeles was first trying to establish itself as a leading sportswear center, designers found it impossible to obtain suitable fabrics. It was even difficult to obtain fabrics of any kind, as preference was given to the eastern markets. At first, designers used fabrics intended for use other than apparel, or developed special treatments of staple fabrics which were more readily available. Gradually the fact that California designers

were willing to try out new fabrics and designs, encouraged textile firms to design especially for them. Mill offices were set up in Los Angeles and soon a number of convertors began to operate there. Special colors were now originated for the Californian manufacturers, and are readily recognized as typically Californian. There is only one mill on the west coast which actually manufactures fabric there. This is Hoffman's Woolens, which does an outstanding job in the production of woolens, specially designed and slanted to California requirements. Some California designers are coming to the fore in the field of textile design. Outstanding among these is Elsa of Hollywood whose fabric designs have caused considerable interest throughout the United States, although her fabrics are mainly confined to the California market.

Several local publications cover the California apparel industry. Published daily in the city is the California Apparel News, a four year old paper, similar in organization to Women's Wear Daily. It reports day-to-day happenings in the Californian market, events of importance about manufacturers, labor situations and other vital material. The California Stylist, a monthly trade publication has become a "buyer's bible" as it attempts to analyze trends in the market, and to highlight outstanding merchandise. Sections giving aid to the buyer as to the selection, promotion and advertising of California merchandise are also included. It covers all feminine apparel and accessories and presents a prestige story of the market to retailers. The Californian is the consumer magazine telling the California story in a similar manner to

that used by the Stylist. This widely accepted fashion publication has a circulation of over half a million. It is a "fashion publication dedicated to more colorful living in the casual but elegant California manner."¹ The best, and most successful merchandise in the market, is used in the Californian about three months after it has originally appeared in the trade publication.

These publications have aided in the wide acceptance of California styles by both trade and consumer. Joseph Osherenko, their editor, is to be congratulated on what he has done for the California market.

These are briefly the main points of interest in the Los Angeles market. It has shown a tremendous increase in volume sales, and these continue to rise. Everywhere the consumer sees the slogan "Something wonderful happens when you wear clothes from California", and because of the glamor attached to this state consumers buy more sportswear from California than from any other market. Manufacturers are building an enviable reputation for quality, styling, and fit, but they are no longer depending on sportswear alone. Not really aiming at becoming a mass production market, its style conscious manufacturers set trends. There are many large manufacturers in the city and having grown with the market they give it stability. Very little contracting is found, a fact, no doubt responsible, for the high quality of the merchandise produced. Manufacturing costs are lower than in many apparel cities as the climate requires no heating or air conditioning. This means less capital is required in setting up a factory. Wages in the Los Angeles apparel industry are higher than elsewhere. Barely more than

1 "Why Buy in California" California Stylist, May 1948, p. 131.

fifty percent of the workers are organized, and the union is finding it difficult to obtain entry to many of the firms because wages are well above the minimum California basic wage.

The world wide advertising of the state of California has indirectly assisted the garment industry, as all that is meant by California appears to be successfully reflected in the apparel designed in the market. This market is bound to find continued success because there is an ever growing demand, throughout America, for the type of clothing which is being designed here. This has been accelerated by increased leisure time since the war. This fashion market has been built on the foundation of small factories established by artist designers who, in spite of opportunities for expansion, have preferred to remain compact entities of the market.

1 Issues of Women's Wear Daily containing information are: June 4, 1943; October 1, 8, 25, 1943, June 23; August 16, 1944; December 5, 1945.

WISCONSIN

It was not until 1945, when some of the local manufacturers formed a market association, that the considerable contribution made by Milwaukee to the garment industry was recognized. Until this time the high ranking of the market had not even been realized by the local manufacturers. Wisconsin had long been recognized nationally and abroad, for its cheese production; and many millions of dollars spent by the breweries have caused Milwaukee to be recognized as a leading market. Because this city had become renowned for these products and heavy machinery, it came as a surprise to both manufacturers and retailers when the facts were put before them. No doubt relatively few consumers are yet aware of the fact that this market ranks among the top ten volume producing apparel markets in the United States.

Although the market was not generally recognized before 1945, the garment manufacturers for some time previously had been slowly building up a solid, if not spectacular, basis for their market. About fifty percent of the manufacturers began operation since 1942.^c Many of them have national distribution, though distributing relatively little in the state of Wisconsin. Milwaukee was, and still is, important for its production of heavy outer clothing, gloves and hosiery. Today the market is diversified, and this adds greatly to its importance. Much of the stature of this market is due to the presence of one of the largest dress firms in the country. This firm specializes

in popular priced junior dresses, manufactured in seven large modern factories throughout the state, and in Michigan.

Milwaukee is the hub of the Wisconsin market and is advantageously located just seventy minutes from Chicago. Excellent highways and transportation, with frequent train service from Chicago and other points, have contributed towards the growth of the market. This factor, together with the diversified merchandise offered has encouraged many buyers visiting Chicago, also to visit Milwaukee. The market here is naturally dwarfed by nearby Chicago. There are, however, many top brand names in the Milwaukee market readily recognized by consumers throughout the United States.

The general recognition and development of the Wisconsin market since 1946 has, to some extent, been phenomenal; and most of it has been due to the formation of a local manufacturers' association, which has presented it to the nation as a fashion market. Preliminary investigation of other fashion markets was carried out by the Milwaukee Journal, which has always given this market its support. This newspaper conducted surveys of other leading apparel markets, making an especial study of the local manufacturers' associations, their aims, work, and methods of promotion. From the findings of this survey the Milwaukee Journal drew up a suggested plan for a Wisconsin fashion market. This is an outstanding example of close cooperation between newspapers and the industry by which both benefit. There has been, since the development of this idea, genuine and substantial support from the local retailers. The manager of the Boston Store in Milwaukee, was indirectly

responsible for the organization of the Wisconsin Apparel Manufacturers Inc. He realized that other, less important markets were developing through the use of modern promotional techniques into important and highly esteemed markets. These two independent reports made the Wisconsin manufacturers aware of the size and diversification of the market in which they were operating.

From this stage on, the story of the Wisconsin market is that of the Wisconsin Apparel Manufacturers Inc. The association is now state wide with a membership of approximately four hundred manufacturers of apparel and accessories, producing merchandise valued at over \$180,000,000.^a As has been the case with other market associations, a special label has been adopted for use by the members of the association. Many individual labels had already received wide consumer acceptance, but through the use of this additional Wisconsin label the consumer has become more conscious of the fact that this market is of some importance. They have likewise learned that the seal "Wisconsin made means quality made" does mean satisfactory, reliable merchandise.

The association helps buyers in every way possible on their arrival in the city. Maps and schedules are supplied and transportation for reaching out of the way manufacturers are arranged. These, and many other services encourage buyers to return again to the market, as it is possible for them to "shop the market" in a minimum of time. As a result many buyers visiting Chicago will spend one day in Milwaukee.¹

Hosiery forms the main feminine apparel manufactured in this market. Dress production has increased so as to be of considerable

1 Unpublished report on Wisconsin Apparel Manufacturers Inc. 1948.

importance to the market, a fact largely due to the expansion of the Rhea Manufacturing Company, one of the three largest in the country. This firm, with six other dress manufacturers, produces an annual volume of \$15,000,000 with an additional \$7,000,000 being contributed by sportswear manufacturers. Some coats and suits are also made in the city, but they are not, as yet, of any great importance.^a

Following the general trend in other markets, Wisconsin manufacturers are also encouraging local designing talent, sponsoring contests in schools of art and design. Many young graduates are employed and are frequently put in sole charge of the designing room, without having any further experience. Through the help of the State Vocational Schools some training of operators is also being carried on.

The association issues a quarterly publication with news of the market and its manufacturers. This is mailed to over 25,000 retailers throughout the United States. Direct mail publicity and trade publications advertising are used by the association, in its attempt to interest the trade and the consumer in the Wisconsin apparel market. Market research is also carried out and the findings are distributed to the members. Members may obtain all kinds of information from the association offices. In addition to the above mentioned they help break down sales resistance, and furnish supplies and representatives for the market. Two annual market weeks are held, and these events have attracted many thousands of buyers.¹

As in all other apparel markets there is a trend in decentralization from metropolitan areas so that the manufacturers can operate in

1 Letter, Charles McElroy, Executive Director; Wisconsin Apparel Manufacturers Inc. Milwaukee, Wis.

the smaller communities where the ILGWU does not hold such great power and control over management and production. This, and the fact that many manufacturers are already established in other cities in Wisconsin, has lead to plans for an apparel mart. Here the association could have its headquarters and manufacturers a permanent place for the exhibition of their merchandise.

There is no doubt that this market will continue to increase in volume production, but is not likely to offer great competition to any of the specialized dress markets, as this market specializes in a general type of dress.

MINNESOTA

The apparel producing cities of Minneapolis and St. Paul are frequently termed the Twin Cities market. Recently, the apparel industry of these cities grouped with that in the rest of the state, to form the Minnesota market. Minnesota constitutes one of the smaller apparel markets, but it is extremely active in the promotion of Minnesota merchandise. As a result; national recognition has been received to a degree beyond that warranted by the volume output of the market.

As an apparel market, the history of the industry in Minneapolis and St. Paul dates back about ninety years, when adequately warm clothing was required by the trappers, lumbermen and settlers. As in other western markets this demand, coupled with the delay in receiving supplies from the east, started the apparel industry in Minnesota. Although of some national importance, before World War I, it was during the war that outside buyers first came to the Twin Cities, impressed by the variety of goods and the services offered by the market. Before World War II, more buyers were visiting the market; and during the war their numbers further increased, as buyers went further afield for merchandise. Minneapolis is the hub of all important transportation in the Upper Midwest, and this is one of the main reasons for its becoming a leading wholesale center, and later a garment manufacturing market. Today distribution of merchandise is mainly in the surrounding states, and the East, with a certain amount of export trade being carried on with Alaska and South America.

Since 1939, the growth of the market has been phenomenal. A great deal of this growth is due to the solid support given by the local retailers, who have at all times stood firmly behind the industry. They substantiate this support by supplying an advisory committee, which works with industry and advises, in the practical approach to answering the needs and requirements of the retail stores. The Women's Institute in this area, did much towards obtaining this support.

This market is primarily planned for the small and medium sized retailer, who is unable to send buyers regularly to New York. Also, the merchandise produced in the market is slanted to the needs of the mid-west although several manufacturers have been nationally recognized for years. A variety of women's apparel is manufactured, although winter sportswear and women's heavy outer clothing are most important. Minneapolis is important for knitwear, more fine branded knitwear being produced there than in any other apparel market. However, St. Paul is more important for its apparel manufacturing. Sportswear for all seasons is produced, and manufacturers feel that their volume production will increase as their market becomes better known for this particular type of merchandise. These garments are created by designers knowing weather conditions and the importance in all seasons of the outdoor life in the northwest.

In every market there is an obvious reason for the type of garments manufactured there because the early manufacturers produced those garments which were especially required in that particular region. In the north-west this demand is for heavy, outer garments, ski and other

sports clothes, because of the rugged climate and the large population of Scandinavian immigrants in Minnesota. When the United States became winter sports conscious, this market naturally benefited, especially those manufacturers whose merchandise was already nationally known. Minnesota has now assumed some leadership in this field, although the Pacific Northwest is attempting to offer a challenge.

This market has shown outstanding growth since 1939, especially in the manufacture of women's apparel, as many new firms have begun operation in the market, and older firms have expanded considerably. Although the National Credit Office reports give the Minnesota dress sales as being \$5,100,000, the 1947 Apparel Markets states that there are fifteen manufacturers of dresses in Minneapolis which alone do a business of \$11,000,000 per year.^a Women's, misses' and juniors' sportswear has grown to be a \$10,000,000 industry, with ten of the Minneapolis firms producing six million dollars of this total, the remaining four million being produced by manufacturers in St. Paul. As far as coats and suits are concerned, the market has shown even greater development. Five new firms have opened since 1942, so that the market's eleven firms now produce \$2,350,000 of medium and popular priced merchandise.^c An estimated volume for the year 1950, based on the great developments which have taken place in the past few years, is set at \$100,000,000.

This market has always maintained favorable labor relations so, today, there are excellent working conditions. They have many loyal employees who have worked many years for the same firm. This accounts for much of the excellent workmanship characteristic of this market.

More original designing and styling is appearing in the market, and always when this becomes manifest that market grows in stature.

A great deal of the market's growth and recognition stems from the activities of the Minnesota Apparel Industries, which began in 1939 as the Twin Cities Apparel Industries, although it had existed as a loose organization since 1927. This organization changed its name in 1947, so that it would tie in more closely with the markets promotion label, "Minnesota Inspired". This association was not very active till 1940, when it was revived and a spirit of cooperation began to develop in the market. The manufacturers realized the great advantages both they and the market would receive, if they set up a full time office to direct market activities. When this was done the membership of the association rose from thirty-three to over one hundred members. Members of the association are manufacturers in Minneapolis, St. Paul, and several other Minnesota areas. This shows the close relationship existing between these two cities, and the cooperation within the garment industry. All of this has resulted in a great increase in volume production. Through this office the market offers many services to the buyer, assisting him to "shop" the market in the shortest possible time, by arranging appointments and transportation.

Six hotel showings and two large fashion shows are held each year. The Minnesota Fashion Industries has become quite famous for its elaborate ice carnival, together with a symphony orchestra program, produced annually in St. Paul. The consumer is admitted to this show, and when

this was first done it was considered unprecedented in the history of the apparel industry. It has proved beneficial to the industry, making the consumer conscious of the expansion and importance of the apparel industry in their state.

Other promotional activities, besides those of the individual manufacturer, are carried out by the Minnesota Apparel Industries. The group advertises as a unified market, in Women's Wear Daily. The association has also chosen a label which is used by all its members, "Minnesota Inspired Apparel". This has been given considerable promotion and is now used in varying forms by all allied branches of the apparel industry. This market describes itself as nature's laboratory, because the four seasons in this area are completely different and any innovation in designing may be readily tested. Everything about Minnesota is used as promotional material as the market feels that Minnesota is rich in folklore, and that much good commercial use can be made of their weather.

A market magazine, Minnesota Inspired Apparel, is distributed twice yearly, to thousands of retailers. This publication gives excellent information on the market.

The Association acts as negotiator in all labor contracts and grievances, with resulting standardized market conditions, a fact valued by both management and labor. This market has shown that strength lies in unity, as it has contributed greatly to national recognition afforded the market.

As is the case in several other markets, efforts are being made to set up a school of design at the University of Minnesota. Attempts are also being made to interest people in the industry as a means of employment.¹

From this very brief account of a progressive market, the importance and value of unity and promotional activities is again recognized. This market has indeed made its presence felt among the nation's apparel markets, and its merchandise is being sought by buyers from all parts of the country. When the campaign to promote "Minnesota Inspired" fashions first began, the annual volume output of the market was \$25,000,000. Seven years later it reached \$135,000,000 an increase, admittedly due, in part, to increased wartime production; but mainly, it is felt, to the intensive promotional program which has been carried out. Leading local papers devote several sections to the Minnesota apparel industry, and this has greatly aided in making the consumer conscious of the importance of their local market.^{a 2}

1 T. C. Cook, Speech delivered before Business Orientation Class, Minnesota School of Business, Minneapolis, Minn. 1948.

2 Women's Wear Daily; January 23; July 10; 1942, January 15, 1943; December 31, 1943; February 19, 1945.

THE PACIFIC NORTH-WEST

The apparel market of the Pacific North-west includes the garment manufacturers of Portland, Oregon; and Seattle, Washington. Although they are in different states, there is a great similarity between the two cities, as the two states are almost identical in their resources and background.

Only in recent years have they received any national recognition, although apparel has been manufactured in this region for many years. The market's principal claim to national recognition is the Jantzen Knitting Mills Inc. situated in Portland, this firm being the largest of its kind in the world. Other firms also have entered the national market in recent years. As is the case with the Twin Cities market, because of a rigorous climate, heavy outer wear and outdoor sports clothes have always been manufactured in these markets. Not until skiing and other outdoor sports became popular in America did the superiority of the sportswear of the North-west come to be generally recognized. These garments are constructed for active, rather than for leisure wear. Recognition of the quality of their goods stimulated market growth. Distribution is mainly in the north-western states and Alaska. Most firms in this area supplement their sportswear production with other apparel also suitable for the climatic conditions of the region. Portland's annual volume of production in coats and suits is about \$2,500,000, and about \$250,000 in dresses. There are approximately forty plants manufacturing apparel

in Portland. The Seattle market is bigger than that of Portland, producing a greater volume of dresses, estimated at \$3,000,000. The coat and suit production, however, falls well below that of Portland, being but \$600,000 annually. Due to the climate and the requirements of the region a certain amount of rainwear is also produced.²

As is the case along the entire west coast, there has been an extraordinary increase in population, estimated at fifty percent in the past ten years. Ship building in Portland, during the past war was, in part, responsible for this, as it brought many workers to the city. This, in turn, increased opportunities for the manufacturing of clothing and other commodities. Many other industries have commenced operation, both in Portland and in Seattle, since this time, so there is no reason for the garment industry to expect to fall back to its pre-war production figure. The garment industry in this area is today four times as great as it was in 1940, a fact noticed in all industries.¹

This increased demand for apparel from the North-west has encouraged the manufacturers to become more aggressive in their approach to the marketing and distribution of their goods. Realizing the importance of good styling, they are paying greater attention to it than ever before, even in the designing of basic garments. They have already found this better styling pays remarkable dividends. It has achieved considerable national recognition for the market, and its leading manufacturers. A few individual firms have carried out intensive promotion in the past few years, with resulting national distribution.

1 "Empire of the West", Women's Wear Daily, October 1, 1943.

This has been of considerable value to the market, as it has brought buyers who have stayed to see what else the market offers. Many of the large firms in this area work with contractors, although they also own one or more of their own factories.

United market activities are just getting underway. A few years ago the Chambers of Commerce both in Seattle and Portland supported market week showings. Now such activities are the duty of the Pacific North-West Apparel Manufacturers Association, originally organized to handle labor relations, O. P. A. problems and other matters relative to the apparel industry. They have, as yet, done little in the way of promoting the market, other than the issuing of a few pamphlets designed to achieve some recognition of the Pacific North-west. "The natural laboratory for cold weather sporting clothes" - a theme somewhat similar to that chosen by the Minnesota apparel manufacturers.¹ With increased promotional activities and styling there should be great possibilities for this market in the coming years.

1 Letter from W. F. Lubersky, executive secretary, Pacific Northwest Apparel Manufacturers Association, Seattle, Washington.

DALLAS

A market of young ideas -- this is the Dallas clothing market. Ten years ago, the contribution made by Dallas to the garment industry was but nominal. Today, Dallas is one of the more important regional markets in the United States.

Several other cities in Texas; Houston, San Antonio and Fort Worth, likewise produce substantial quantities of clothing. Dallas is, however, the only one of any real importance to the women's garment industry, having since 1939 gained national standing.

The Dallas apparel industry developed from a distributing center. With the opening up of the Southwest many thousands of people came to Texas, and Dallas, because of its geographical location, became the center of distribution for a large area. Today, ten million people live within a radius of five hundred miles of Dallas. It has become the fashion center of the Southwest, and, in the opinion of some, the leading fashion city in the United States. Dallas is said to have more fashion-conscious young women than any other city in the United States. This alone should spur the ambitions of the Dallas sportswear manufacturers.

The development of Dallas as a distributing center ultimately lead to the organization of many wholesale houses, and it was out of these that the garment industry grew. Manufacturing really began in 1914, when Higginbottom and Bailey bought a wholesale dry goods business which had been operating for fifteen years. Before World War I there was very little manufacturing by comparison with eastern

markets. The first lines manufactured were wash dresses.

The man behind the change of this market from a jobbing to a manufacturing center is Justin McCarthy, who now operates one of the leading sportswear houses in the United States. Justin McCarthy worked as manager of the ready-to-wear-department for his uncle, an owner in the firm of Higginbottom and Bailey. In the 1920's, when the middy blouse became practically a uniform throughout America, McCarthy persuaded the company to buy a small Dallas factory manufacturing these blouses. This was a successful venture and soon the market was manufacturing wash dresses priced from \$1.00 to \$1.97. Gradually the production of better dresses was undertaken.

By 1927, McCarthy was manufacturing independently and other firms were also operating in the city. Still others followed these pioneers of the Dallas garment industry. For a number of years the Dallas market remained a wash dress market, but gradually a new trend developed in the Southwest in an attempt to fill a demand for cool, washable and practical street apparel. Manufacturers found, that due to the unavailability of this type of dress, women were making their own or employing dressmakers. Here is yet another instance of how the requirements of a specific region in the country, led to the development of a specialized industry.¹

As soon as local manufacturers began to realize, that they had something different to offer, the great growth of the Dallas market began. Manufacturers turned to the production of a characteristically

1 McKee, Velma, "Justin McCarthy Fashions Known All over the World", Southern Garment Manufacturer, May 21, 1945.

Dallas styled type of sportswear, which was readily acclaimed throughout the country.

Dallas is centered in the middle of the colorful Southwest, and as in California, manufacturers recognized the charm, glamor, color and romance of the area, and capitalized on these factors. They developed fashions in subtle color blends, more subdued than those of California, and characteristically Texan. They also developed a style of sportswear with a casualness of design eminently suited to the requirements of the Southwest.^b

Having established the special trend it planned to follow, the market has grown to become of considerable importance to the country. The greatest improvements in the industry occurred during and just after the recent war. Many obstacles which beset the early market were overcome; and manufacturers, confident of success, are promoting Dallas as an outstanding, individual market. From the beginning, it has attempted to develop its own particular niche in the industry. Thus merchandise, because it is a characteristically Dallas styled fashion, will draw buyers from all parts of the United States as well as from overseas countries. The market itself feels that it has accomplished a great deal, and that it is well to the fore in the creation of outstanding sportswear.

Many other factors have influenced the growth of this market, some due to the close cooperative planning of the manufacturers. In an effort to make America conscious that the Dallas garment center was creating styles especially suitable for the Southwest, a group of

five leading manufacturers combined forces eight years ago as the Sportswear Guild. The Southwest Style Show Association had, for a number of years, produced elaborate style shows, models being displayed to the music of a top-flight name band. Buyers in the Southwest still recall these elaborate affairs in the late thirties which brought many hundreds into the city. Prior to 1940, and the formation of the Sportswear Guild, the promotional activities of the garment industry had been to some extent in the hands of the Chamber of Commerce, this generally being the case, with a young market striving for recognition.

In 1941, the leading sportswear firms, sensing the importance of a united front in the post-war era, organized to form the Sportswear Guild which six months later became the Dallas Style and Sportswear Center, now known as the Dallas Fashion and Sportswear Center. The association's membership consists of manufacturers, wholesalers, and many unrelated groups desirous of developing the Dallas market. The original group of five members has grown to include thirty-seven, who sell nationally and in five foreign countries. During the past few years "Dallas" and "sportswear" have come to be synonymous.

The main objective of the association was to promote Dallas as a sportswear center. The market was promoted in Women's Wear Daily four or six times a year. The first of these sections alone brought a fifty percent increase in inquiries from all parts of America. At that time the future of the market was foretold as brilliant, and it seems to have fulfilled this prediction.

Once the manufacturers in this area decided that Dallas sportswear had great possibilities, there was a rapid conversion in the market. As a result, a great number of manufacturers now produce for national distribution a type of sportswear designed for active outdoor life.

The close cooperation between local manufacturers has been partly responsible for the rapid growth of the Dallas garment industry. Although, naturally, there is intense competition, manufacturers appear willing to help each other in every possible way. If unable to supply a buyer with the desired merchandise, the manufacturer will send him to a competitor in order to keep business within the market.

Today, fabrics with a Texas slant are being especially designed and converted for some of the Dallas sportswear houses. A few textile firms, for two reasons, have seen the need of designing especially for a regional market. First, market requirements differ from the east, production being planned far in advance of the New York market, because of the great distance from their source of supplies. Second, the need for different colors, and the desirability of designs which characterize regional folk lore, are coming to be recognized. Most generally such designs are confined to an individual manufacturer, although the following season they are sometimes converted into piece goods. Frequently, the roller for the design is owned by the dress manufacturer, who converts his own fabric in order to have an exclusive design. This is not a trend peculiar to the Dallas market, but is also seen in other specialized markets. For high style garments,

which barely enter into this discussion, many special designs are screen-printed specifically for a leading manufacturer or designer.

A great many other factors have influenced the styling, quality, and growth of this market. Among these is the Dallas Fashion Group which, like the market, is young and enthusiastic. They constitute a vital part of the market and have done much to stimulate good design. Having the utmost faith in their market, they are proud to be a part of it.¹

The leading retail stores in Dallas have likewise played a significant role in obtaining wide prestige for this market. From the time the manufacturers began to produce a typically southwestern garment, local retailers have cooperated in the promotion of Dallas merchandise through special window displays of Dallas-designed clothes. Dallas has the good fortune of possessing one of the most outstanding stores in the country: Nieman-Marcus, a fabulous store, not because of its building, which is relatively unpretentious, but rather because of the outstanding quality and range of merchandise it carries. This retail organization, through wide distribution of quality and well styled merchandise, has not only achieved nation-wide consumer recognition but an enviable reputation for its high fashion ready-to-wear. The store has contributed greatly in making Dallas the fashion center of the Southwest. Not only does Neiman-Marcus promote the work of America's top designers, but it has always given generous credit to the ambitious, profitable, and growing Dallas sportswear market. The firm has also influenced other retailers in the city to promote

1 See discussion of The Fashion Group for further information.

the merchandise of local manufacturers. Each week Neiman-Marcus and A. Harris present, in one of the leading hotels, a luncheon fashion show, attended by most of the designers in the market as well as by consumers. Quite frequently, garments from local manufacturers are presented in these showings. This presentation of locally manufactured merchandise to regional consumers is coming to be a fairly general trend. The retailer has learned that only through their support is spending power increased within the area, a factor which means greater returns to them. Promotional activities are not entirely disinterested, but mutually profitable.

A monthly periodical, The Dallas Fashion and Sportswear Magazine, privately owned but well supported by the manufacturers, publicizes Dallas fashions. It is distributed to retailers throughout the country and has accomplished a great deal for the market.

Although not exclusively representing Dallas manufacturers, The American Fashion Association has had considerable influence on the growth of this regional market. The eleven year old association consists of representatives of apparel and accessory manufacturers from all parts of the United States. The market weeks held by this group bring many thousands of buyers to Dallas from all parts of the country. These showings have helped make buyers aware of the quality standards and styling of Dallas manufacturers. The Dallas Fashion and Sportswear Center's market weeks coincide with those of the American Fashion Association. The latter association has considerable national significance, and membership in it is eagerly sought. This

association is one of the oldest in the country with a membership of 265 representing 650 leading manufacturers. It offers many services and entertainments to the visiting buyers.

✓ All these factors have influenced, and, to some degree, molded the path of the Dallas market. Particularly the work of the Dallas Fashion and Sportswear Center, with its national publicity plan, has increased volume sales tremendously. Late in 1948, the first of a feature called "Buyers Retail Sales Institute", cooperatively arranged with the Texas State Board of Vocational Education, was offered to the retail buyer. Lectures included personnel training, advertising, and display suggestions. Another notable event, sponsored by the Dallas Fashion and Sportswear Center in conjunction with the great Texas State Fair, is the presentation of a fashion showing of Dallas-made garments. This event is attended by many thousands of customers. All these services and activities have grown with the market, which today produces annually a volume of \$67,000,000, as compared with the 1939 dollar volume of \$14,000,000; a figure including non-apparel textile products.^c Sportswear is the most important type of apparel produced here, with an annual production valued at approximately \$18,000,000.^a

As in many other apparel markets, there has been a gradual change over from the dozen-priced to the unit-priced dress. In the case of this market, however, the change was made more on account of increased styling than because of increased costs. Many lower priced houses felt that they should develop a better dress line in order to average

up the market, since house dresses seemed to be among the slowest sellers. In 1947, the annual production of dresses was approximately \$11,000,000.^a

The coat and suit production in the market is low primarily because of the limited demand in the area for this type of clothing. Coats and suits are produced in fabrics of suitable weight for the mild Texas climate. Production in this field will no doubt increase from the present \$4,000,000 annual volume. Sportswear production, however, is certain to dominate this market which aims for second place among sportswear markets.^a

Several other types of feminine apparel are manufactured in Dallas; and although not pertinent to this discussion, it is interesting to note that Dallas ranks third in the United States as a millinery market.

The School of Costume Design at the Southern Methodist University is sponsored by the manufacturers' association which awards scholarships to encourage and develop young, native designer talent. The founding of this school brought about a closer relationship between the retailers and manufacturers.

Dallas is looking to the future with the expectation of deserved prominence and increased volume production. A considerable amount of export trade is currently carried on with a number of South American countries. One leading manufacturer in the market has built a factory in Mexico for the manufacture of his fashions. Among American markets, the chief rival of Dallas is California; although Miami, at the moment,

is putting in a small but determined bid for recognition in the sportswear field. Miami specializes in the production of high styled garments, whereas Dallas manufacturers concentrate on medium and popular priced lines. Currently there is no rivalry between the two markets. At one time it was suggested by Dallas that they have coordinated showings with the California market, but California was not agreeable to such a plan. This was not because the Californians feared competition, but rather because they felt "the Dallas market would lose some of its individuality by following this plan".

This then is the story of the Dallas market, the leading dress market of the American Southwest, and one which has made use of every opportunity offered by its natural setting to create new, original and exciting sportswear. This is, indeed, the secret of this market's growth and status as the center of creative sportswear. As in other centers there is a trend toward decentralization with the establishment of factories within a radius of fifty to sixty miles from the city. Plans for the building of a merchandise mart in Dallas are well underway, so that related lines will be concentrated for the buyer. This would add greatly to the facilities of the market.¹

Women's Wear Daily: March 24, 1943; August 5, 1943;
October 20, 1943.

ATLANTA

Developing from a trading center to an important distributing center for the South-east, a position it still retains today, Atlanta is also supporting a growing apparel industry. The first manufacturing of garments in Atlanta began in 1912 with one dress firm. Today, this market is apparently the largest of its kind in the south, after St. Louis and Dallas.¹ Over the past few years garment production has greatly increased, work apparel being the most important feature of the market. There are twelve manufacturers of women's dresses who produce \$6,000,000 annually, one factory having begun production as early as 1915.^a

Although this market currently has only regional distribution in the nearby states, Atlanta hopes to achieve national recognition as an apparel market. Market weeks and style shows are held, and a monthly publication is issued to retailers in the south-east. The manufacturers of women's apparel now selling nationally, advertise collectively several times a year in Women's Wear Daily.

A unique feature of the Atlanta market is that it offers overnight deliveries. This has resulted in market expansion, as most of the industry's outlets are the small retailers from nearby towns. This and other services are offered the buyers, as the market attempts to establish itself as a year round market.^b

1 Statement in letter from Atlanta Chamber of Commerce.

MIAMI

It is only within the past five years that the Miami market has come into prominence among the regional apparel markets. It is a young, vigorous market, which has grown so rapidly that many of the people vitally concerned in the industry, are surprised at the important volume it produces. It continues to grow, and has attained some importance as a style market.

The garment industry in Miami has developed over a period of twenty years, from very small beginnings to become one of the most important industries in the city. Most of this growth took place during World War II. The market is primarily a sportswear market, producing high styled, quality garments. The local manufacturers have used to the utmost all that is offered by their environment, in a manner similar to that followed by both the Dallas and California markets. These manufacturers realize that they have something on which they can capitalize, and making the most of their opportunities, they have managed to develop a small apparel industry into one of considerable importance. There are some who think this apparel market may soon offer real challenge to the other sportswear fashion centers. Miami is definitely growing as a style center and in many respects is following the development of the Los Angeles market. The industry has developed with the establishment of many fine retail stores, which serve many thousands of tourists who annually come to Miami from all parts of the United States; they apparently prefer

to purchase clothing while on vacation. There is, today, a rapidly increasing, and alive, permanent population in Miami, which adds some stability to the market.

Sportswear is the main type of apparel manufactured in this market, a natural development when the climate and situation of the market are considered. The production of sportswear is valued at \$7,500,000. Dresses, showing a trend towards sportswear, have an annual volume of \$1,000,000. In recent years, there has been an attempt to establish a coat and suit industry which now produces \$1,500,000 annually.^a

At first the output of the market was such that the garments were distributed only to the local retailers. Gradually, their popularity spread beyond the tourist trade, and out of town buyers vacationing in Florida began to sense the ready consumer acceptance of Florida fashions. First placing tentative orders with local manufacturers, they soon became convinced of the stability of the market.

The Miami market stresses originality of style. There is close cooperation between the retailer and manufacturer, enabling the manufacturer to judge style trends more accurately than before. Styles in the market have been tested in a somewhat novel way. Small quantities were sold to the local retailer, and tourist buyers response used as a guide in determining fashion trends and styles to be included in the manufacturer's line. Manufacturers now realize that their styles are well accepted, and that they no longer need to test their lines in this way. More efficient production methods

were developed with increased volume output. The line now goes into production earlier, with resulting larger orders being received from out-of-state buyers. A fair export trade has also sprung up with the Carribean Islands.

In 1940, a small group of manufacturers, The Miami Manufacturers Guild, organized for the promotion of the market. It was re-organized under the auspices of the Chamber of Commerce in 1943, as the The Miami Fashion Council, which operates as a branch of the Chamber of Commerce. There are twenty-eight members of this association and it is interesting to note that seventy-five percent of these have started business since 1942.^c

Using the label, "Fashions from the Fountain of Youth", the Fashion Council carries out considerable promotion. The story of the market is now being publicized in a new bi-annual publication. This association has done much towards developing an original market. The market annually arranges an Easter fashion promenade, usually in conjunction with the Orange Bowl festivities, an event first organized for the entertainment of navy personnel. Today, it is attended by thousands of consumers, and these shows have greatly stimulated retail sales, thus showing the manufacturer the value of including the consumer in his elaborate showings.

In 1947, the association exhibited their members' lines in New York, simultaneous with their openings in Miami. This was done to present the Miami market and merchandise to buyers visiting New York who were unfamiliar with the character of this markets merchandise.

This market has great possibilities. In spite of its youth, it has gained importance as a style center, although the volume it produces is not yet of great significance. Manufacturers have small establishments, and are able to produce new and novel garments quite rapidly. Transient labor makes it somewhat difficult for the industry, although the growing population in Miami should make it possible for the industry to expand.¹

1 Women's Wear Daily - January 5, 1942; December 13, 1943; December 27, 1944.

OTHER SMALL MARKETS

Although not producing enough apparel to be called significant markets it is of some interest to mention here that a few cities, towards the end of World War II, began to make a bid for their share of the apparel industry. They realized the apparel industry was bound to increase tremendously with the resumption of production of civilian consumer goods following the close of the war. In most cases, the attempt to interest manufacturers has been carried out by the local Chamber of Commerce.

Among these cities now producing small quantities of women's and misses' apparel are Houston and Fort Worth, Texas. Neither are large manufacturing markets, but they are advantageously situated in the center of a very rich and rapidly growing area. Although there is little likelihood of their becoming important nationally known markets, there is the possibility that they will continue to maintain their present production. Garment manufacturing in Houston has increased proportionately with new markets in other parts of the country. Today, they have seven firms producing an annual volume of women's dresses valued at \$3,400,000, \$800,000 worth of sportswear is also produced in this city.^a There are a total of twenty-four manufacturing firms in the city. Very little national distribution is carried out by the Houston manufacturers, as they seem to prefer to remain a somewhat unknown quantity in apparel production; a fact possibly due to the extreme importance of other industries in this, the most rapidly growing city in the United States.

In Fort Worth there has always been some apparel manufacturing, but the war did bring considerable expansion. There are now fifteen manufacturers in the city, four of whom manufacture women's sportswear and wash dresses, producing a volume of about \$1,600,000 each year^a. Much of this is distributed nationally. There is no market association here, nor in Houston, but as Fort Worth is only an hour from Dallas, the leading apparel market of the South-west, manufacturers showings coincide with those of the Dallas Fashion and Sportswear Center. Since Fort Worth is an important distributing point, The National Fashion Exhibitors of America, representatives of women's and children's apparel manufacturers from all parts of the United States, stage their shows there to coincide with those, in Dallas, of the American Fashion Association. These selling events have brought many buyers to the city, and have greatly aided Fort Worth manufacturers.

Another Texas city, manufacturing a small quantity of women's and misses apparel, is San Antonio. This growing market, aims to be the leading American infants' and children's wear center. About \$1,000,000 worth of women's dresses and sportswear is also annually produced in the city.^a

Many cities already manufacturing a small amount of apparel, are trying to encourage other garment manufacturers to set up industry in their environs. They are, as yet, of small importance and therefore are not discussed in this report. A sizeable volume of clothing, when adding up their total output, is also being produced

in small towns throughout the country. Nothing further is being said of these towns, as they will probably be among the first to disappear with the end of the seller's market.

GENERAL SUMMARY OF THE REGIONAL MARKETS

This study has aimed to present, in chronological order the history and development of individual regional markets, their specific characteristics, types and volume of garments produced, and the aims and activities of the local market associations. It seems desirable in summary, to make a brief comparison of their volume production. Only basic differences will be presented and reference made to the appropriate tables in the appendix for additional information. These tables show relative ratings in volume production of leading apparel markets.

Tables I and II (Pages 245&247) compare the dollar sales of the various markets for both the dress and women's coat and suit industries. Estimated figures, prepared by the Market Planning Service, are listed with those taken from the 1939 U.S.Census report. Even a casual study of these tables shows the great increase in production which has taken place since 1939. In the dress industry, it is interesting to note the low total number of firms in such markets as St. Louis, Chicago and Cleveland which rank comparatively high in dollar volume production. These markets are characterized by a number of very large, manufacturer-owned establishments which manufacture by the sectional method; a system designed for increased volume production. In contrast, Los Angeles has a much higher percentage of the total number of concerns in the national industry, due to a large number of relatively small, high style houses in which the designer is also the manufacturer.

Compared with New York, which in 1946 produced 66.8 percent of the nation's total sales volume in the dress industry and 74.1 percent in the coat and suit industry, the combined dollar volume of all regional markets was only 33.2 percent in the dress industry and 25.9 percent in the coat and suit industry. Thus, it may appear that too much emphasis has been placed in this report on these markets. However, it must be remembered that when the New York market was only as old as these regional markets are today, New York was not producing any greater volume. Markets outside of New York have shown a steady, and, in some cases, a rapid increase in production; so even though New York still produces more apparel than that of all the regional markets combined, its percentage of national total production in women's apparel is slowly but steadily declining. The position, or ranking, of markets, exclusive of New York, may alter within the next few years as a result of intensive promotion. Over the past seven years, the Los Angeles market has shown the greatest increase in volume sales, rising from fifth and third positions, respectively, in the dress and women's coat and suit industries, to a corresponding third and second position. It is interesting to note that the coat and suit industry in Kansas City and Baltimore within the past two years are ranked as major markets. More recent figures in the dress industry would probably reveal similar results in some of the other smaller markets discussed in this paper.

The Market Planning Service reports break down market statistics into several divisions: volume by grade of garment; years in

business; volume group; sizes manufactured; garments produced; distribution by outlet and production method. The figures are of considerable interest in a detailed statistical study of the apparel industry but for the purpose of this report only those figures for the method of production and grade of garment produced are cited. This information, found in Tables IV to VII (Pages 249-252) show that the regional markets use little or no contracting. This is a significantly different feature when compared with the New York market. It is not a result but rather the reason for much of the progress of the regional markets. Manufacturer-owned factories provide greater production control of their product; this is indicative of quality control which is of such importance in many of the allied textile industries.

A study of grade of garment produced shows that the medium priced garment is manufactured in greatest volume in all markets. Higher priced dresses manufactured outside of New York, except in a few isolated cases, are produced only in Los Angeles and Chicago.

Apparel Markets, 1947 breaks down the distribution of unit volume sales by each market, allocating appropriate dollar sales to the different types of apparel which are produced within that market. It provides figures (See Table VIII, page 253) which make an interesting basis for the comparison of the markets.

The final table to be found in the appendix, (Table XI, page 254) is taken from Facts for Industry Series and shows dollar shipments by area of the women's, misses' and juniors' outerwear

industry, for the first six months of 1947 and 1948. It is interesting to note that total production in the major women's apparel industries declined 5.6 percent in relation to 1946 figures. However, St. Louis, Cleveland and Kansas City respectively showed increases of 2.6, 9.9, and 8.7 percent. All other markets showed a decrease; New York 7.1 percent and Boston, Los Angeles and San Francisco a 12.0, 19.7, and 8.6 percent decline respectively.¹

In spite of the fact that the apparel industry anticipated a continued decrease in unit sales, there was an increase of \$86,000,000 for the first quarter of 1948 over 1947; and a corresponding increase of \$18,000,000 in the second quarter. All apparel industries shared in this dollar sales increase, although the greatest increase has occurred in the dozen-price dress industry. The peak year in clothing production is said to have been 1946, but volume sales for the first six months of 1948 show a two percent increase over corresponding 1946 figures. However, these increases are due, in part at least, to the increased price ranges that have developed because of increased production costs for labor, fabrics, et cetera, in the dozen-price dress industry rather than increased unit volume.²

It has been noted that geographical location has affected the development of the different markets, and the styling and distribution of merchandise. The greater speed and ease of travel today stimulates wider distribution of merchandise than possible before, so that practically every market is now visited by buyers who come from every part of the country. Naturally, widest distribution is

¹ St. Louis Chamber of Commerce Report Prepared from Facts for Industry Series

² Facts for Industry op. cit.

found in states adjacent to the market. The style of garment produced in the individual markets is suited to that regional area. These regional markets, except for the older eastern ones, have tended to specialization in merchandise and acceptance from outside the markets is largely responsible for their rapid growth. Manufacturers now realize that to increase the value of their market, to the buyer, they must offer greater diversification in apparel. As a result, the establishment of many supporting industries, as millinery, accessories, etc., is being encouraged.

The promotion of fashion markets, as a unit, rather than through individual manufacturer promotion for national acceptance, has proved its great worth to certain cities which, for a number of years, have been operating on this principle. Phenomenal sales increases have resulted. The California market is outstandingly the most promotion-minded of all apparel markets and has set a high standard for other associations which have but recently sought national acceptance. Promotion of both the individual apparel manufacturer and the market is the chief aim of the market groups. In the main, these associations are the same in all cities and the services they offer buyers are practically identical, the main differences being the degree to which promotion is carried.

Promotion activities, within the markets, have helped build volume sales and market prestige. Few of the older markets have, as yet, begun using these relatively new techniques; but they are slowly coming to realize that even though they feel their market is

sufficiently well entrenched, to combat the rapid advance of the young markets they will have to launch greater national promotion. However, there are to be found in these markets a few old and somewhat conservative firms, which add stability to the market. Behind these firms there are years of production of high quality which the consumer and retail buyers have come to recognize, and to expect. These firms continue to give satisfaction and have been nationally accepted without all the "fanfare" used by some of the younger markets. New, young, blood among manufacturers in these more conservative markets is bringing a more enthusiastic approach to promotion. Eastern markets are finding that they, too, have a fund of folklore, climate, and other factors peculiar to their region, which can serve as a basis for excellent promotion.

It will be interesting to watch the future of women's apparel markets. Volume sales of the larger markets will, no doubt, increase with continued promotion and result in a further decrease in New York's production. What will happen to the smaller market which grew to market stature only during or since the war years? Many in the industry who know a great deal about the production situation in apparel, feel these cities cannot possibly continue increasing output, or in some cases, even survive. Probably the smaller markets will continue to manufacture a nominal volume, but it is doubtful if their total volume will make any noticeable contribution to the industry.

The markets which early in the war began planning post-war expansion have, and, indeed, are showing accomplishment. The far-

sighted, ambitious and extremely active apparel markets have made the nation's buyers, and an increasing number of consumers, conscious of the fact that there are important apparel markets other than New York and California. All of these markets produce well styled, quality apparel, merchandise of which the United States may well be proud.

VII PROMOTION ACTIVITIES

The previous discussion of the regional markets and associations has stressed the importance of unified market promotion. Apart from these combined market activities, the individual manufacturer also carries on promotion. Some types of promotion and factors influencing market recognition will be briefly discussed in this section.

NATIONAL ADVERTISING

There is a general and important trend in increased advertising in leading consumer fashion magazines, such as Vogue, Harper's Bazaar, Charm, and Mademoiselle, or trade publications such as Women's Wear Daily, Women's Reporter, and others. This medium is chosen in an attempt to make both retail buyer and ultimate consumer more conscious of manufacturers' brands, and designer names. The demand for national brands has increased, but they must be kept constantly before the eye of the consumer-buyer to remain in popular demand. Fashion magazines are generally considered the most satisfactory medium for this. The promotion of brand names has many advantages for the consumer but likewise benefits the manufacturer through increased sales. As brands are constantly promoted and volume selling is increased it tends to stabilize employment. Due to constant competition, manufacturers are continually striving to improve their products in both style and quality. National brands for all kinds of apparel are definitely beginning to dominate the situation in this industry. While they are not as well known as brands in other commodities, they certainly are increasingly being recognized by, and asked for by the consumer.

This constitutes a trend the manufacturer cannot ignore.

In the past, the promotion of brands was left entirely to the retailer. Now, manufacturers are constantly featuring their own merchandise. Ninety percent of the retailers pattern their advertising on that of the manufacturer who frequently provides them with ideas for window or department displays and advertising layouts. The retailer has learned that national brands sell more readily because of the national advertising done by the manufacturer. However, there must be perfect coordination between manufacturer and retailer if the greatest benefit is to accrue to both from this costly type of national promotion. Since the war, brand names have assumed even greater importance than previously, because manufacturers now appear to have greater control over the quality of their product. This is one of the improvements in the industry which resulted from wartime controls and specifications. National advertising is likewise recognized as an important means of increasing foreign trade. American apparel is currently being manufactured in overseas markets under their nationally known brand names with royalties being paid to the American manufacturer. This new development provides an even greater incentive to a manufacturer to promote his product through national advertising, because American fashion magazines are distributed throughout the world.

It is interesting to explain how brand names came into existence. Prior to World War I, a few high priced lines, and a very few low priced wash dress lines were nationally known. Because of the lack of

competition in the field, these houses established a trade mark and quality standards at very low costs. During and immediately after the war, several of these firms discontinued their advertising and today are no longer recognized by the public. Those that continued national advertising during this period are today household names in the apparel industry, one of the best known being the Nelly Don brand name. Promotion and advertising have become such outstandingly important factors in distribution that they are considered by many as essentials for any successful commercial enterprise.

National advertising in the garment industry came into its own during the years following World War I, when newly established rayon yarn houses were anxious to establish trade names. At first, these houses subsidized the garment manufacturers in a small way, and then more generously if the fabric brand was prominently featured. This raised the question as to what should be advertised and resulted in the revival of old, or the creation of new brand names. At first, eighty percent of each advertisement was devoted to the rayon yarn house. The manufacturer soon realized that this type of advertising had speedy and effective sales results, so he demanded more subsidy from the rayon houses. Soon the converter was brought in, the rayon mills and converter each paying twenty-five percent of the cost of the advertisement, the manufacturer paying the remaining fifty percent. As manufacturers began to realize the great possibilities of national advertising, they began using this method more frequently.

The Associated Garment Industries of St. Louis was the first group of manufacturers to use brand names as a means of market expansion. They developed the idea of selling only goods with a brand name, and confined sales of these garments to but one store in each city. This plan was soon copied by other markets in the country. National advertising of apparel brands readily gained momentum. Later a new fashion magazine established nation-wide connections with retail stores for advertisements in conjunction with editorially featured products. The low advertising rates and increased circulation of the periodical aroused the interest of many apparel manufacturers. There was unusual acceptance by both the retail store and the consumer, and soon the high fashion magazines imitated this procedure. Manufacturers became increasingly conscious of the advantages of such advertising and soon better known retail stores began to feature new brand names in ready-to-wear. Besides having special fashion shows, window displays and so forth, these stores did all they could to tie in their promotion with the prestige of the label.

Before World War II, fashion advertising was already showing signs of phenomenal growth, and today advertising is often limited only by the availability of magazine space. During the war years, advertisers were encouraged to keep their product before the public, so that their brands would not be forgotten and need rebuilding when materials again became plentiful. This had happened to many garment manufacturers in the previous war and the re-establishment of their trade name had proved very costly.

During World War II, hundreds of new brands in apparel appeared as manufacturers, by this time, realized their sales value. However, where quality, style, and service were not maintained, many lines are now finding it difficult to survive the intense competition again prevalent in the industry. Many new, small, and even unreliable manufacturing firms were encouraged by retailers during the war because of the over-all shortage of supplies for production of civilian goods. Today, many retailers will sponsor and promote only those brands which are guaranteed by the manufacturer and supplied in sufficient volume. National advertising has proved to be of definite assistance in consumer acceptance of a branded line. The manufacturer and the retailer, especially in a confined line, in a sense, work as business partners since both must hold to certain standards. During the war it was found that a shifting population tended to shop for brand names they knew, and as this became a significant trend it assumed importance, not only to the industry as a whole, but especially to the younger markets. Thus, brand names in apparel lines have proved to be of definite aid in selling. To many people the success of the Midwest markets is attributed to the establishment and successful development of their brand name lines, sold by the franchise system. Some manufacturers feel the retailer does not necessarily do the best possible job of promotion with a confined line.

Advertising has been found to have amazing results in total sales volume throughout the country. Thousands of mail orders may follow the national promotion of a garment in several leading fashion

magazines. Naturally, there must be close cooperation between the manufacturer and the retailer. Such promotions are generally carried out about four times a year on one or two special garments, which are generally basic, well styled garments suitable for reorder. To obtain the most value from such promotional campaigns, everything, from the making of the design to its ultimate distribution and local promotion, must be closely coordinated. For the greatest effect, retail distribution and consumer advertising must "break" at the same time.¹

NEW METHODS OF SELLING

As a development born of necessity in combatting the highly competitive situation in the garment industry today, and also as an aid in stabilizing the industry, manufacturers are realizing it is now essential to devise new, and more satisfactory selling methods. Manufacturers now use new methods which they feel will show their line to greater advantage, and also reduce the time formerly spent by their salesmen in showing the line. In most of the regional markets manufacturers sell by sending salesmen into territory where buyers may not otherwise be interested in their merchandise. This direct selling method again assumes importance because it permits several states to be covered by fewer salesmen. Some firms are using more salesmen than previously, so that they may gain intensive coverage of a single state.² Photographs either in color, or black and white, showing different views of the garments, together with the actual sample garments are

1 "Third National Brands Survey," Women's Wear Daily, November 25, 1947; "Fourth National Brands Survey", Women's Wear Daily November 9, 1948; Women's Wear Daily, January 9, 1945.

2 "Sold: 50,000 pieces of Ready-to-Wear in Seven Days," Sales Management, Vol. 59, October 15, 1947, pp. 44-46.

coming into popular use by salesmen. Many manufacturing firms are doing a great deal to assist their salesmen by supplying them with various other selling aids. These are generally in book form which shows the line they are promoting with photographs of the garments, and explains the services offered to the retailer. Firms using this approach to selling have found results most satisfactory.¹ One St. Louis firm is using a new device whereby colored slides are thrown onto a screen to display the complete line. The firm using this selling method does not send out sample dresses with the salesmen. Criticism made of this plan is that buyers usually like to see, and feel the actual garment. However, this firm reports satisfactory sales from the use of this method. The salesman find it saves both time and energy, as the apparatus can be easily set up and operated. A firm manufacturing lingerie has developed a viewmaster which they install in their retail outlets. This supplies the retailer with a three dimensional color film and swatch book containing samples of all fabrics, trimmings, et cetera used on the garments.² This selling device allows the line to be shown to buyers all over the country without the use of salesmen and without the buyer having to visit the market. Under this selling plan the consumer also helps determine the line which is to be carried. This method of selling has proved successful and has allowed interesting promotional tie-ins. The use of the movie

1 "Policies that licked the Seasonal Selling Bugaboo for Koret," Sales Management, Vol. 59, December 15, 1947, pp. 80-85. Printz-Biederman & Co., Salesman's Book.

2 "Kodachrome Fashion Show Jumps Gun on Market Trips," Sales Management, Vol. 58, May 1, 1947, pp. 95-96.

as a means of displaying the line to the retail buyer has been used with some success by a few manufacturers.

MANUFACTURERS AIDS FOR THE RETAILER

Realizing that the retail sales person is the weakest link in the chain in selling merchandise, many of the larger manufacturers are doing all they can to train and improve her selling techniques by providing her with a "good selling story". To the author, it seems that this is primarily the job of the retail store; but it is a service retailers are demanding more and more of the manufacturer. Several manufacturing firms, doing their own printing, have formed clubs to which each new salesgirl selling their merchandise is automatically elected. Regular monthly bulletins are sent out providing news of the latest promotions and special selling points of these garments. Competitive awards are often offered for display and other ideas, and frequently the bulletin includes suggestive material. One firm in St. Louis sends out an amusing and informative booklet to each new salesgirl. This book tells the story of the firm and its product, and among other things gives notes on the fabrics used and how to care for them so that the salesgirl in turn may give the consumer accurate information.

Advertising kits and aids are supplied by many firms. In this way the retailer, especially the small store which has no advertising staff, may make use of the manufacturer's trained promotion personnel. Frequently a series of inexpensive, seasonal window and floor display suggestions, newspaper mats and layouts, "blow-ups" of national

advertisements, announcements for radio advertising and many other aids are supplied.

A leading coat and suit house in Cleveland has for the past few years been offering a special consumer education service. Two Home Economists of their staff visit women's clubs, colleges, universities and other women groups, and lecture on the fine points of tailoring and advise the consumer of the points to check when buying any tailored garment. Care of clothing and other topics are also discussed. This educational service, begun experimentally, has brought many new customers to this firm, although it is not offered primarily as an advertising project, since the name of the firm is in no way promoted in these lectures. The firm advertises in Home Economics magazines, and provides bulletins on the choice and care of clothing and fabrics for distribution to Home Economics students. This project has proved outstandingly successful, and this firm may be proud of what it is doing for the consumer.

Advertising aids prepared by the manufacturer are available to the retailer either at initial cost or free of charge. Small advertising aids such as hand tags bearing their trade mark, special size tags, alteration tags, match books, or anything which may catch the fancy of the consumer are devices used to keep the name of the manufacturer before her.

It is general practice to supply the retailer with newspaper mats for each style he buys and most firms will also supply suggested advertising layouts in which these mats may be used. Glossy photographs

may likewise be obtained on request. These are often preferred by the larger or more exclusive retail shops. Mail enclosures are provided at a very low cost, approximately one cent per copy. These are generally included in monthly statements sent to charge customers. Often brochures are sent out by the retailer to announce the arrival of the line. These direct mail advertisements always carry the name of the store featuring the promotion. Some manufacturing firms offer prizes for window displays and later incorporate them in suggestions to the small town retailer.

THE FASHION SHOW AND ITS IMPORTANCE

Many special promotion activities are carried on by individual firms in the market. Spectacular fashion shows for the trade and press, and more recently the consumer, are frequently presented by large manufacturers. For such activities they annually allot a certain sum of money for such use. These shows generally cost many thousands of dollars. Such publicity is never measured in dollars spent, but always in editorial lines received. In practically every case, the free editorial lines received exceed the cost of the original promotion. These successful shows presented by an individual manufacturer invariably develops interest in that market, although the greatest advantage naturally goes to the manufacturer featuring the promotion.

The fashion shows of today constitute an important marketing device. They are becoming an integral part of "big business" methods in promoting such allied lines as cosmetics, and fashion shows are no

longer confined to the garment industry. They are generally designed exclusively for the press and the trade. Manufacturers feel that even if they receive only one editorial their money has been well invested. Naturally, any spectacular show will receive numerous editorials in leading American fashion magazines, newspapers and trade publications. The amount of free advertising and prestige thus obtained far outweighs the cost of the production. These shows are definitely major events, and should not be confused with the fashion shows presented by the retailer. The elaborate shows staged by industry are much more costly than retailers shows and have much greater influence on current style trends.

Certain advertising agencies in New York specialize in developing and presenting these elaborate shows, and devising original ideas of presentation. Each agency has a separate fashion division organized to handle the complete staging of these performances. A fashion show in mid-air; a three-day week-end at the Grand Canyon to view Californian clothes; a three-week vacation in the mountains to view winter sports clothes; Aqua follies; Western fashions shown at the annual rodeo show in Madison Square Garden; are examples of some of the more elaborate shows primarily designed for the press, which have been carried out for the promotion of both medium and high priced fashion merchandise. Some large popular-priced houses also use this promotion device. In every case the amount of publicity obtained has been far greater than would have been gotten if paid for as actual lines of

advertising.¹ There are, of course, **very** great possibilities for fashion promotion by television.

THE IMPORTANCE OF THE FASHION EDITOR

The newspaper and fashion magazine editor has become an important and integral part in fashion promotion. Without a sympathetic fashion editor, a manufacturer could spend thousands of dollars on a promotion to little or no effect. Many markets, and a few individual manufacturers now hold press weeks once or twice a year. Criticism is sometimes made of "market press weeks", especially those in New York and Los Angeles where there are many high style houses. Some manufacturers feel that only the models of top designers and manufacturers are viewed by the press during these special weeks; the small manufacturer receiving only reflected publicity. During these press weeks entertainment is lavish, with shows, cocktail parties, breakfast, luncheon, and dinner parties. Editorial publicity is expected in return, for these press weeks are a veiled type of advertising.

PERIODICALS

Perhaps some mention should be made of the influence of fashion, business, and popular magazines in publicizing the garment industry. Life has aided in promotion of different markets by extensively illustrated feature articles. Colliers, Saturday Evening Post, the American Magazine and many other magazines frequently carry articles about different fashion markets slanted to the consumer's viewpoint. These magazines

- 1 Elliot, George, "Is a Style Show a Good Promotion Investment," Sales Management, Vol. 59, November 1, 1947, p. 48
"Fashion shows are Big Business," Business Week, April 19, 1947, pp. 31-32.
Kimball, Abbott, "A Fashion Show is More than a Field," Sales Management, Vol. 59, November 1, 1947, pp. 44-48.

have greatly influenced the launching and development of new fashions, as they reach millions of consumers in every section of America, as well as, different parts of the world. A two or three page spread in a magazine, such as Life, concurrently released as a new fashion idea is launched, will have a tremendous effect on its acceptance. Naturally, it is the desire of every manufacturer to be featured editorially in such a magazine, but few achieve this widely sought honor. Fashion magazines, which carry nation-wide coverage of markets, frequently arrange market fashion shows featuring the most significant garments from the collection.

PROMOTIONS OF INDIVIDUAL FIRMS

There are many other interesting and effective means of promotion used by different manufacturers but only a few will be briefly discussed. In 1943 one St. Louis firm instituted a "Junior Board of Review", a committee of college and career girls. Originally all board members came from the St. Louis market but now a cross section of the firm's consumers are brought together, to pass judgment on current lines before they are offered to the retailer. This board votes on silhouette, fabrics, and colors, and approves final numbers in the line. The board was first used experimentally, more or less for promotion; but, today, it also serves a practical purpose, in that increased sales follow when the choice of a well balanced line is made by representatives of the group that will wear those fashions. Somewhat the same idea is used by many retail stores today in their "back to school" promotions. This promotion is perhaps the most extensively

used promotion in this country. College girls not only select wardrobes for display, but often act as consultants in the stores during this promotion period.

Another scheme coming into some prominence today is a "dress of the month" plan. A special garment from the manufacturer's line is selected for national advertising and promotion in several leading fashion magazines. Mat service, radio scripts and promotional ideas are supplied the retailer to tie in with this promotion. Stores featuring the garment and supporting the plan have had excellent sales results.

Notwithstanding the close proximity of Hollywood to the Californian markets, few manufacturers have ever tied in with a film production. One firm, however, not only designed the clothes worn in the picture, but also manufactured and released them nationally, simultaneously with the film. This scheme was repeated several times with apparent success, the arrangement being carried out with less important film companies. The featured garments were in Western styles, sportswear and teen-age styles. This same firm has also promoted its line through a nation-wide radio hookup.¹

THE IMPORTANCE OF THE RETAILER

While some mention of the retailer has already been made, it seems more emphasis should be made of his importance to the fashion industry. In some markets the local retailers have played an important part in the development of the market while in others, the retailer is surprised

1 "Koret Adds New Twist to Hollywood Fashion Tie-Ins,"
Sales Management, Vol. 58, April 15, 1947, pp. 76-78.

to see that a local market has sprung up overnight. Local retailers have, on the whole, been inclined to overlook their local market until it was discovered by out-of-town buyers, or until manufacturers had through extensive promotion achieved national recognition. To a certain degree this is understandable, as the local retailer, desirous of having "something different to sell", often feels that local merchandise is lacking in glamor. Therefore, he seeks other markets. This, perhaps, is one of the reasons for the nationwide promotion California markets have given their garments. Local stores have not given California merchandise undue promotion, as they feel that their consumers prefer merchandise from outside markets as well as their local markets. Perhaps the most extensive California promotion ever carried out was done by Filene's in Boston; they used every department throughout their store in the promotion of Californian sportswear. This store-wide promotion was somewhat amazing when it is realized that Boston is itself an important sportswear market.

Some local stores promote merchandise of outstanding local manufacturers, or feature them cooperatively with the local market association. St. Louis stores frequently pay tribute to the St. Louis Fashion Creators, by presenting extensive window displays of the market's merchandise, during the manufacturers' market week. These promotions are often city-wide and feature such slogans as "Junior Fashions by St. Louis designers for young St. Louis" or "By young Americans for Young America". In Kansas City a special promotion of the local manufacturers is carried out annually by leading retail stores, which, for an entire week, feature Kansas City-made apparel. Similarly in

Dallas, Texas, many of the local department stores feature local manufacturers in their national advertising, because they realize that the local market is of utmost importance to their own development; and that the goods which are produced are outstanding in quality, workmanship, and style. Such promotion helps make the consumer conscious of the fact that they, too, are a part of a growing and satisfying market. The local retailer has learned that by supporting manufacturers within their market, they indirectly improve their own business.

THE RESIDENT BUYING OFFICE

The goodwill of resident buying offices is likewise important to the local manufacturer. Generally, these offices are opened in the regional markets once they recognize it as a national market which provides diversified or specialized merchandise. The establishment in a market of such buying offices as the American Merchandise Corporation and The American Retailers Association, gives stature to the market. These resident buying offices represent hundreds of retail stores throughout the United States, and they know well what merchandise is in greatest consumer demand. They often act as consultants to the industry. The increased number of resident buying offices in a market does, to a certain extent, give recognition to its growth and development. Although these buying offices purchase all kinds of merchandise, apparel is their biggest and most important item.

Thus there are many ways by which the manufacturers may promote their merchandise and many ways by which they, in turn, may be promoted. The apparel industry is highly competitive, so it is almost

essential to carry on novel and continuous promotion. Much has been omitted in this discussion of the types and importance of fashion promotion; but the author hopes that this section conveys something of what is being currently done by way of advertising and promotion in the apparel field, and of its significance to the industry.

VIII THE FASHION GROUP

The Fashion Group Inc. is of growing importance in the fashion world today. Their influence has been widely felt in the past fifteen years and will undoubtedly continue.

"The Fashion Group Inc. is a national organization with headquarters in New York and Regional Branches in key cities throughout the United States. It is a non-commercial association of women engaged in fashion work, formed to advance the principles of applied art in industry and to foster good taste in fashion; to encourage the cooperation of those engaged in designing and executing fashions; and, through education and the dissemination of useful information, to inspire a keener interest in fashions, to the end that those engaged in the field of fashion may better serve themselves and the public at large!"¹

These are indeed high ideals for any association to aspire to, but by aiming high, the Fashion Group has achieved much for itself and its members, as well as the American garment industry as a whole.

The total membership of the Fashion Group Inc. consists of approximately 2,000 women, drawn from many branches of the fashion field. Women eligible for membership, include designers of fabrics, clothing and apparel accessories, retail store executives and buyers, fashion editors and copy writers, publicity directors et cetera. All must have held an executive position for several years before being elected to the group. All members are powerful enough, in their individual positions, to be an influential factor in determining fashion trends for American women. They have opportunities of following consumer acceptance through contacts with retail salespeople and buyers, as well as observing what is being worn by fashion conscious groups.

1 Fashion Group Constitution and By-Laws

The Fashion Group has not only done a great deal to assist its members, but has played an important role in promoting fashion consciousness to many different groups. Their first important contribution to the fashion world was in 1935 with their original "Fashion Futures Show", the forerunner of countless fashion shows of today.

Regular monthly luncheons are held and many other activities are carried on by all Regional Groups. At these meetings, most of which are open to friends of members, leading American, French, and British designers, and other important people in the fashion world are guest speakers. Special events are organized as group projects. These generally take the form of elaborate fashion showings. However, this organized group is not permitted to make awards, or special recognitions; nor may it sponsor any individual manufacturer or product, as this is contrary to the non-commercial policy of the organization.¹

Some outstanding fashion events have been carried out by some of the larger or more active regional groups. Most of the proceeds go to charity, though some are kept by the group to supplement its finances. Perhaps one of the most extravagant shows ever presented by any branch of the Fashion Group, was held in February 1948, when the Fashion Group of St. Louis, presented with the St. Louis Symphony Society, "Symphony of Fashion with Ballet". The fashion shows which they sponsor in no way attempt to promote the market in which the group is active, for gowns designed by top American designers and manufacturers are displayed. Nevertheless, they often focus considerable

1 Carson, Ruth "Fashion High Command", Colliers, Vol. 121, June 12, 1948, pp. 18-19.

attention on an individual market. In this particular case, the work of St. Louis's young designers was well represented, one section of the program being devoted to the "Enchanted Years", the teen-age years. This particular show was the first event of its kind ever presented in the United States, and the script has been widely sought since its production.¹ With this outstanding program the Fashion Group of St. Louis gained publicity for itself, and unofficially aided in promoting the St. Louis market.

Though somewhat contrary to the policy of the Fashion Group, Dallas members have stimulated good design, and raised standards within their market. They offered an award, "The Dallas Alice", for the designer creating the most outstanding dress of the year. At first local manufacturers were very critical because they felt that designers should not be honored in this way. However, after the award was made for two years, the Fashion Group received acknowledgment from the manufacturers' association for what they had done for the Dallas market. The Dallas Fashion and Sportswear Center recognized that the great improvement in the standard of design, within the market, was due to the work of the Fashion Group.

The Fashion Group of Los Angeles is another active group which has carried out many interesting projects. In an attempt to answer the many questions put them as to what makes "California different", they have written and published California Fashion Explorers. This is a valuable contribution to the literature of their apparel market.²

1 Dallas Fashion and Sportswear Center is planning a "Symphony of Fashion" for Spring, 1949.

2 The Fashion Group of Los Angeles, California Fashion Explorers, The Ward Ritchie Press, 1945.

The Fashion Group has been one of the most potent factors in uniting the fashion industry. Membership in the group has rapidly increased. In New York and several of the regional markets job bureaus are operated for its members. Several groups have organized and conducted fashion training courses in which prominent fashionists lecture. Although the Fashion Group works primarily with the industry it likewise works closely with consumer groups.

IX SCHOOLS OF DESIGN IN APPAREL MARKETS

There is a growing trend to develop schools of design to work in close cooperation with the garment industry. As these schools develop and take their position in the market structure, they play an increasingly prominent part in its stature. Through these schools well-trained designers become available to the industry. As they are a part of the local market they can better analyze its requirements and produce designs more fitting to its needs. This assists the market to develop an individuality essential for existence in today's fashion organization and operation. Such schools are successfully operating in several leading apparel markets, while other progressive markets are planning the establishment of similar schools. Local manufacturers have found that these schools receive a certain amount of publicity which is indirectly advantageous to the industry. The schools recognize that benefits are mutual.

The most notable of these training centers, the Fashion Institute of Technology in New York, provides unlimited inspiration for the young designer. In as much as the New York market is not being fully discussed in this paper, it is perhaps sufficient to say that the Fashion Institute of Technology and the Needle Trades School, have had an amazing influence on the New York garment industry.¹

There are three other outstanding schools of design in the country, and, although still young, they have made some contribution

1 Lewis, Dorothy, "Snip and Tuck School", Colliers, Vol. 116, November 10, 1945, pp. 14, 46.
Disher, M., op. cit.

as pioneers in the field of design. Schools offering a bachelor degree are situated in St. Louis, Dallas, and Los Angeles. Recognition by manufacturer and schools alike of the potential success of graduates from such a program may ultimately make it essential that a designer, desirous of a prominent position in industry, must qualify for a college degree.

In other markets, also, there are schools working in close cooperation with the local industry ~~which are~~ subsidized by the manufacturers. These schools are usually art schools and do not offer a degree at the completion of the course. In many cases, they have not received deserved recognition for outstanding instruction in costume designing. Such schools are to be found in Boston, Chicago, and Kansas City and smaller market cities, such as Milwaukee and the Twin Cities. In Boston, for instance, there is the Modern School of Applied Art, which has an excellent reputation for training in costume and allied fields of design. There are several other training schools in the city for designers. In Philadelphia, the Drexel Institute of Technology is doing excellent work. The School of Design in Chicago, in a course first offered in 1942, places emphasis on the principles of mass production. There was an unsuccessful attempt by the manufacturers to support a school of design at the University of Illinois. The Cleveland industry likewise attempted to initiate a fashion course at the Cleveland College. Perhaps one of the best schools of design is in Kansas City, Missouri. The Art Institute, a privately owned institution, offers outstanding training in costume design although no degree

is granted. The school receives continuous support from the local manufacturers' association and, after four years, this training course has been recognized as being of real benefit to the industry.

As in other markets where the schools are working with industry, manufacturers have helped initiate and organize the curriculum of fashion training. In most of the markets power machines, equipment and materials are generously supplied by industry to the design schools. Technical instruction is also provided on request, and frequently a generous scholarship fund is available for students.

The first school of this type in a regional market was the School of Design at Washington University in St. Louis. The story of its association with the manufacturers has already been discussed. The Dallas Fashion and Sportswear Center similarly cooperated in the foundation of the School of Design at Southern Methodist University in Dallas, basing its curriculum on that of the School of Design at Washington University which had proven to be successful. Subsequently, a similar course of training was established at the University of California in Los Angeles.

The specialized curricula offered at the above mentioned universities are practically identical. In general, they present both basic and specialized training, students qualifying for the Bachelor of Arts degree on completion of a four year course. A two year course is available for special students who have had some previous training. Required basic courses include English, the Social Sciences, a foreign language, mathematics, et cetera. At Southern Methodist University

and at the University of California in Los Angeles, the School of Home Economics offers a curriculum cooperatively planned with the art department. The direction of the course in both schools is under the art department. At Washington University all courses are taught as a part of the curriculum in the School of Fine Arts.

THE SCHOOL OF DESIGN, WASHINGTON UNIVERSITY, ST. LOUIS

Of the three schools mentioned, the School of Fine Arts at Washington University appears to have the most comprehensive curriculum. This school offered a course in costume design before the Associated Garment Industries of St. Louis gave its financial support to the school.

The school and its graduates have not only influenced style trends in junior clothing, but have helped to make St. Louis one of the leading regional apparel markets. The majority of the manufacturers early recognized that no one is better fitted than the "junior-miss" to design junior styles. The original acceptance of this theory is the story of a revitalized market. Students provide fresh, vital ideas for designs, related to the interests and enthusiasms of the young consumer. The mature industry has given the school the value of its years of experience and knowledge of technical application. As a result, students receive realistic training. At first, the students emphasized novelty ideas, but today they stress "liveliness" of design rather than ornamentation for they realize a fresh approach, and avoidance of hackneyed and conventional ideas, are required to maintain this market's unchallenged leadership in junior fashions.

While still in training, students are given opportunity to obtain practical experience in the industry and may spend the summer months in the work rooms of one of the St. Louis manufacturers. The student characteristically wants to "design the line" at this stage-- a fault recognized by all colleges offering such training. However, when students are willing to work in any department or under the direction of an experienced designer, they receive invaluable training and often assure themselves of a position after graduation.

Many generous scholarships are given by the industry, retailers, and other allied fashion groups. Fabric is supplied by some manufacturers and a few large fabric houses supply materials even before they have been shown to the manufacturers in the market. In the latter case both the students and the fabric house benefit, as the school, using an experimental approach, sees how these fabrics may be used most effectively and efficiently. The textile industry often utilizes the results in promoting their fabrics. This school is gradually coming to be recognized as a "research laboratory" for the garment industry of St. Louis.

The success of the School of Design with the Associated Garment Industries of St. Louis subsequently lead to a similar arrangement with the St. Louis Millinery Association. The inclusion of millinery designing in the curriculum is of great benefit to the students. This association, well aware of the value of student designs, purchases many for manufacture. Equipment and some specialized instruction is supplied by the association.

A similar arrangement has resulted with the shoe manufacturers, who constitute an important section of the St. Louis apparel market. Manufacturers supply all materials required in the courses, and, from time to time, judge the results, even manufacturing some of the better designs for use in the school. Occasionally, student designs are used in the line of individual manufacturers, but generally they are fully publicized in the Footwear Magazine as the work of the students at the design school.

From this detailed account of the program of training at Washington University one recognizes it as well rounded and practical. Because of the genuine interest and cooperation of, not only the garment industry but also the millinery and shoe industries, the student is not limited to one field of design after graduation. Students frequently enter one of the accessory fields. In spite of the considerable support given the School of Design by the manufacturers, they do not attempt to direct the policy of the school. The school is free to develop its curriculum and train students in the manner it considers best for the mutual benefit of students and industry. The St. Louis Fashion Creators also work with other Schools of Design in the area, the most notable perhaps being at Stephen's College where a number of scholarships are granted. The close alliance with the colleges and universities and the encouragement given young designing talent is perhaps the basis of this market's strength.

SCHOOL OF COSTUME DESIGN, SOUTHERN METHODIST UNIVERSITY

A similar arrangement has been worked out at Southern Methodist University in Dallas, Texas, where a specialized course of training

in Costume Design is offered. Sponsored by the Dallas Fashion and Sportswear Center it was formally presented to the college in 1943, although it was not until 1945 that the school was actually established. So far, only costume design is taught at this school, and in view of the size of the millinery industry in this market, it is surprising that this industry has not cooperated in some way with the school. The program of training in this university was patterned after that in St. Louis. Manufacturers provided the necessary funds for the organization of the school at Southern Methodist University. They recognized not only the promotional value of such an arrangement but realized it ~~was~~ a source for designing talent. The founding of this school strengthened the link between manufacturers and retailers in the Dallas market. A large number of scholarships, generally awarded on a basis of outstanding design ability, are given each year. Greater industrial control is evident in this school than at St. Louis. Southern Methodist University, however, does have a considerable degree of freedom of action in this cooperative training program. In the four years since its establishment, enrollment has greatly increased, and its influence is now beginning to be felt in the industry. The manufacturers are proud of their project. Some recipients of scholarships work several hours each week in the factories while studying; this type of arrangement being ideal, for the student is learning the theory of designing and at the same time its practical application.

SCHOOL OF DESIGN, UNIVERSITY OF CALIFORNIA, LOS ANGELES

At the University of California, Los Angeles, the School of Design was opened at the close of 1943. It began in grand California style, and

the Californian Apparel Creators presented \$10,000 to the University for the establishment of this course. Concurrently they organized an elaborate fashion show on the college campus using students as models. This school, as originally set up, hoped to become the most outstanding in the country. It was thought, at the time, that scholarships would be given by manufacturers and that they would continue to support the school, but this has not been the case to date. Manufacturers, occasionally, have sponsored design contests in an effort to stimulate the interest of students. The dramatic opening of the school gave the California market and the University much free publicity, but it seems that manufacturers have, to some extent, lost interest in the project and the University has had to carry on alone. It is hoped that it will be possible for college authorities and the manufacturers' association to meet together this year in an attempt to find some basis whereby the school and the industry may work more closely together. Prominent people of the Los Angeles market have often been guest lecturers in the courses offered by this design school, and their assistance has been invaluable to the students. Both apparel designing and apparel merchandising courses are offered and in this respect the school differs from those previously discussed.

In both Dallas and Los Angeles, the curriculum in costume design is planned in conjunction with the Home Economics departments. In Los Angeles, the School of Business also contributes to the apparel merchandising courses. There has been some criticism concerning the Home Economics training given in clothing construction. Some feel

methods of construction, primarily for home use, should not be taught in these courses. as they are totally different from industrial methods. On the other hand, many students, especially male students, enter these courses with no understanding of pattern pieces or the simplest methods of construction--so for them the training provided in Home Economics is considered essential. It is, however, a debatable point. In all the schools mentioned, an attempt has been made to secure clothing instructors who have had trade experience and, some teaching experience. Experience in the industry enables the instructor to readily recognize whether a design is practical for manufacture. This is a factor of the utmost significance in training designers for mass production, as too few give this point any consideration in the creation of their designs. The instructor with trade experience also knows trade methods of pattern making and construction and naturally can advise students better. Whenever possible, students work under simulated factory conditions; each student having her own sample maker, who constructs the garment on a power machine by factory methods, only the design being created and cut by the student.

This summarizes the training in schools offering the bachelor degree with a major in costume design. All graduates are rapidly absorbed into the industry, being eagerly sought by all markets. New York still lures many with promises of great designing opportunities, but manufacturers consider that students are generally more successful in the market where they have trained.

These schools of design, and others not nationally recognized, have certainly influenced the markets in which they are situated. They serve as a source of new designs, and one needs but review the story of the St. Louis or Dallas market to note the influence young college graduates have had in developing individuality within the market. In California, as in New York, it is more difficult for the young designer to "arrive" because in both of these markets they are in competition with recognized couturier designers.

Schools of design do receive a certain amount of publicity; for example, when there are student fashion shows. some reflected publicity for the sponsoring market invariably results. In many ways, the money spent by the manufacturers in establishing and maintaining these schools has brought early returns in newspaper and magazine editorials. However, this is not the primary reason why manufacturers continue support of these schools. They not only have a genuine interest in their development, but have come to regard them, to a certain degree, as their special responsibility, and watch with a certain amount of "parental pride" the progress and influence of the school and the accomplishments of its graduates.

VOCATIONAL SCHOOLS

Realizing the necessity of maintaining a steady supply of labor, many manufacturers' associations, in addition to subsidizing schools for the training of designers, are also cooperating with vocational and trade schools. A shortage of labor has been felt in all regional apparel markets and every possible attempt is being made to remedy this.

Due to "sweat shop" conditions in the early years, there has been a growing antagonism among native born Americans to enter the garment industry. Today, the older immigrant labor is gradually disappearing, and the skilled Jewish artisans who constitute the largest percentage of workers discourage their children from entering the industry. Obviously there are fewer well-trained men and women to replace those who have grown old with the industry. This has been especially noticeable in western regional markets where there were relatively few immigrant garment workers. The critical shortage of skilled labor was first felt during the war years. In several regional markets, vocational training schools have received support from the manufacturers in an attempt to train a reserve supply of skilled labor for the post-war years.

The progressive St. Louis Fashion Creators, has subsidized several schools in St. Louis and supplied power machines for the necessary training. An advisory committee of representatives of the American Federation of Labor, the Associated Garment Industries of St. Louis, and the Education Division of the U. S. Employment Service, has assisted the schools in planning their programs. The main training school is the Hadley Technical High School in St. Louis. Another is the East St. Louis High School which trains negro labor, which is used quite extensively in this market. Courses in power machine operation are also offered interested women. The Associated Garment Industries of St. Louis operate a placement and guidance bureau for the trainees of these vocational and technical schools and demand for them is great.

In Kansas City, the Apparel Association cooperates in a similar way with their vocational schools, and while still in training the trainees earn fifty cents per hour for a six hour day. Other markets have worked out similar systems for replenishment of an inadequate labor supply.

Some of the trade schools are making valuable contributions to the garment industry in their respective markets. One such school is the Frank Wiggins Trade School in Los Angeles which trains not only operators, but also pattern cutters and designers. Some members of the industry feel this school is doing a far better job than the university in the preparation of designers for the industry. All the instructors in the school have had several years of trade experience, an essential qualification for appointment to a teaching position in the school. An additional advantage of this school is that many of its famous graduates give lectures there or advise the students.

X CONCLUSION

This paper has sought to cover, in a general way, the organization of the garment industry and the development of modern production methods. It has discussed the origin and development of the New York market, and the most important regional markets. Promotional activities have been reviewed, both from the point of view of the different markets, and the individual manufacturers. The influence of various groups and organizations on fashion promotion and industrial development has also been discussed. It remains but to say something of the factors which are significantly influencing the future of the apparel industry.

As undoubtedly realized, the ILGWU has played a significant role in shaping the course the industry has followed through the twentieth century, from the sweat shop to the phenominally improved labor conditions of today. Without doubt, it will continue to be influential in the years to follow. The work of the union and its growth since 1932 have been discussed at some length. It is obvious from this that management and labor are attempting to work together for mutual benefit. Management still prefers to work without the restricting influence of the union, but the better understanding developing between these two opposing groups present great possibilities for the future of the industry.

The trend to decentralization is being felt in every apparel market. This movement, noticeable in every American industry, was

not brought about entirely by the last world war, as it began much earlier in the apparel industry. During the past twenty-five years manufacturers have gradually moved out of New York to the larger cities. The beginning of decentralization almost coincides with the rise of the union, and the attempts of apparel producers to break away from its control. World War II is said to have strengthened the position of the union in the larger cities; and decentralization was, to some degree, retarded, because of the difficulty of obtaining sufficient equipment and labor. Since the end of the war many factories equipped for work other than garment manufacturing, have been converted to the production of civilian apparel. One important reason for this trend is the critical shortage of labor in the needle trades. Labor has always been a vital part of this industry, as its structure and maintenance may be largely attributable to immigrant European labor, which contributed to the establishment of the apparel trades. As immigration groups have varied, so has the labor force in the garment industry. The first to come were English and Scotch, then the Irish and German immigrants, who were followed by Russians, Poles and Jews. Later still the Italians dominated the labor market. The garment industry can no longer rely on immigrant labor because of the lowered quota allotment of these garment working nationalities. Thus a great shortage of skilled labor has resulted. This is augmented by the fact that all but the Italians discourage their children from becoming a part of what they still remember as "sweated" labor. Apart then, from the desire of

management to free itself from union restrictions, this growing shortage of labor is responsible for industry locating in small towns. Large factories are using every available opportunity to obtain sufficient labor so they may maintain volume production. Many manufacturers who have built large modern factories in metropolitan areas have been unable to obtain the necessary labor force. For example, the Donnelly Garment Factory in Kansas City, in spite of excellent working conditions and equipment, has had to open factories some distance out from the city. Bonds Inc., Rochester, N. Y., built a factory to employ over five thousand. They were unable to obtain more than about three thousand people and so have had to decentralize their manufacturing units. Such conditions are naturally not the most satisfactory for large scale operations. A plentiful supply of labor, preferably trained, is essential to the needle trades. Without operators the industry cannot exist, since it can never be entirely mechanized. Modern production methods have made it, however, no longer necessary to employ only highly skilled labor. The "sectional system" permits the use of unskilled labor at relatively low wages.

Another trend is cooperative training with trade and vocational schools, where operators are trained in power machine operation. Generally the school is given some financial support by the local manufacturers. Some markets have developed this plan further than others, and results are proving to be very satisfactory; although the demand for semi-skilled and skilled labor is never entirely

relieved. Many manufacturers have planned their own training program. This is not particularly popular, as during the training period production is slow and too frequently the operators, after their training period has been completed, leave to work for another firm.

Because of this labor shortage, there also appears to be a very definite trend for garment manufacturers to operate factories in the small towns, where war industry was previously carried on. The war industries left these towns with well planned factories and a supply of locally trained labor. Many of these plants can readily be converted to garment production. Clothing manufacturers are also operating in towns close to the large garment centers, where previously there was not any industry. They are readily welcomed as they provide a new source of employment for the inhabitants in these communities. Manufacturers are interested in such a plan for it constitutes, for them, a satisfactory labor reserve. The ILGWU is of the opinion that increased styling will retard this development, as well as the use of the sectional method of production. It is only in the production of a few standardized styles that this method can continue to expand.¹

In general, the garment industry still consists of small factories, and a few very large ones, which have been established in the market centers outside of New York. These expanded considerably during the war years, for many firms in the Mid-west and West, which received large war contracts, began to use scientific methods of production. Others who were already using them expanded their plants. Except in the New York market contractors have all but disappeared

1 Daniel, W. Trends & Prospects. op. cit.

in the apparel industry. There are still a number of manufacturers who augment their output by employing one or more contractors.

Another trend in the garment industry began during the war years. Due to wartime controls, there was some integration in garment production. Mills and converters began to manufacture fabrics for their own garment factories. Others sold fabrics directly to the retailer who used his own contractors to manufacture goods to be sold under his private brand name. With the gradual return to peacetime conditions, some integrated mills realize that they are too far removed from the style end of the apparel industry to successfully carry out complete integration--that is the manufacturing and distribution of garments. As a result there has been a swing back to the more traditional distribution of piece goods. The future of integration is, however, highly controversial.

Another important trend, first practiced during the war and continuing to grow, is the entry of men's wear manufacturers into the women's coat and suit industry, and the production of tailored dresses. This originally came about with the sharp drop in civilian production of men's clothing and the fact that many of these firms received war contracts for uniforms for the women's auxiliary forces. Firms which transferred, produce simple, well tailored suits and dresses which have been enthusiastically received by the consumer. Finding this more profitable than production of men's apparel, which is more standardized, manufacturers who entered production of women's apparel during the war are planning to continue, and some contemplate

expansion. This has caused a major problem for both management and the union in the women's coat and suit industry. Labor in the men's wear industry is paid at a lower rate and garments can be produced more cheaply. Because of planned expansion, especially by such firms as Bond's Inc., which are expanding both manufacturing and retail outlets, the ILGWU is trying to organize these workers

The war with its many regulations, did a great deal for the apparel industry. Because of the strict check kept on factories under contract to the government, production efficiency was improved. The accurate costing of garments, was introduced for the first time. Before this was done few firms had any real idea of production costs, other than fabric and labor costs. Manufacturers found that the time and money spent in costing was slight, compared with the knowledge gained and the improved efficiency in production. Since the end of the war, most manufacturers have continued to use this system in a similar or modified form. Besides introducing this cost accounting system, government restrictions on styling, during the war years, helped stabilize the industry. Diversity of fabrics used, types of garments made, multiple size and style. ranges will probably never return to the extent that they prevailed in pre-war years. Continued specialization in production will no doubt result in increased quality of workmanship, because operators will become more skilled.

Seasonal fluctuations in the garment industry have always been the source of concern to both management and labor. Attempts are being made to overcome and make possible a fifty week employment year.

Some market associations, and individual manufacturers, have already drawn up such arrangements with labor. During the war, when large government contracts had to be filled, seasonal fluctuation in production practically disappeared. Increased and competitive styling, which has recently returned, means that production cannot continue at such an accelerated rate and once again seasonal fluctuation will increase. Some firms have done a great deal to overcome these "seasonal peaks and valleys" by concentrating on well designed, medium priced classic garments. The sale of this type of garment is not as seasonal as that of the high styled and higher price dress lines. The designing of functional classic types of apparel, characteristic of American clothes, may contribute to steadier production. Increased leisure and travel, and the demand they create for greater quantities of these classic styles are influential factors in sustaining this trend.

Increased costs in production, from 1939 on, are responsible for much of the change in bases for pricing which has taken place. Increased labor and fabric costs, as well as overhead expenses, have made it impossible for many house dress manufacturers, other than the large volume houses, to continue producing the dozen-price dress. Possibly, when American economy is more normal, costs may drop with a corresponding return of the dozen price dress.

To augment domestic sales and further build up the apparel industry in the United States, manufacturers are realizing that they must seek new outlets in export. For many markets this is the only

way by which they can profitably continue producing a volume which warrants the continued use of the sectional system of production. Before the war, only a relatively small amount of the total volume production was exported to foreign countries. Up to this time no-important increase in export has been possible, due to the economic conditions in many of the countries which normally would import American goods. During the war, United States servicemen and women were stationed in practically every country in the world, and American fashions received considerable publicity. A demand for American made clothes increased and several countries are now producing American styles on a franchise basis. Although this is not the most satisfactory way it does show the boundless possibilities of expansion when foreign countries, having undergone reconstruction, are able to import the clothing which they so badly need.

There is still room for considerable development in the domestic market, and many feel that efforts should be made to expand here, before considering export. With the availability in the domestic market of the hard commodities, the consumer has already shown her unwillingness to buy low quality poorly styled merchandise. The high price of apparel has increased consumer-buyer resistance to the extent that already there has been a notable increase in the sale of piece goods for home sewing. As this trend increases, it is essential for the garment industry to analyze why ready-to-wear is not as acceptable as formerly. The consumer must be convinced

that the industry can produce garments of such fabric quality, style, and fit that it is no longer economical to construct clothes at home. This is an important issue, for domestic consumer resistance is definitely being felt by the industry at the moment.

"The year 1946 was a peak year in women's clothing production. To some extent, then, the decline (in buying) represents a correction of the distortions brought on by war. Nevertheless, it should be remembered that the changes in style which began about a year ago outmoded wardrobes and caused many women to make purchases which otherwise would not have been made. Most of the change will probably have been completed by the end of this spring's production season and the stimulus to demand which the present fashions have created should have disappeared."¹

A great deal could, and perhaps should, be said of the evils of style piracy and the influence it has had on the dress industry. It will have been noticed throughout the discussions of the apparel markets that some have made a genuine, and successful attempt to eliminate piracy within the market. In every case where this has been carried out more or less successfully, there has been an almost immediate improvement in the quality and standard of design. Manufacturers in the regional markets have shown pride in the fact that most of the lines produced are styled by their own designers. Surely this is some encouragement to those who are working so hard to overcome this evil. Many manufacturers, however, especially those in New York, feel that the garment industry could not exist without this method of obtaining designs. Some, whose designs are actually pirated, have no objections unless the stolen designs, which are invariably reproduced in a lower price range, are sold before the original

1 "The Business Situation", Survey of Current Business, March 1943, p. 24.

design is released. The author would refer the reader to The Pirates Will Get You by Sylvan Gotshal for the story of what is being done to combat the style pirate in the textile and apparel industry. Gotshal is working with others for the introduction of an international law to overcome this evil. M. D. Crawford is another prominent figure in the fashion world who also feels strongly about this situation where the style pirate rules the industry. Although speaking specifically of the New York market his following statement may well be taken by the entire industry as a warning.

"Basically the dress industry is an art, which, through the sewing machine and skilled labor, has been turned into an industry. But, it still remains an art, and must be treated as an art if it is to remain a permanent feature in the industries of this city. The attitude of the manufacturers and the unions toward the artistic phase of the development of the industry is lacking in vision. During the early phase of the development of this industry it lived, exclusively, on the plagiarized ideas from the couture of France. Today, this city contains a small group of designers, who, in any city, at any time, under reasonable conditions, would be outstanding, but, there is no law, tradition or custom to protect the equity of these individuals in their own creative achievements.

"There can never be an enduring and successful dress industry in this city unless we protect the creative talents of designers."¹

Some industry leaders feel the garment industry in the United States will never reach full maturity and strength until its intense competitive nature, and especially piracy, are in some way controlled. A united effort on the part of all apparel markets could best achieve this and not necessarily interfere with regional production or promotions. If such an organization would consider industrial

1 M.D.Crawford, "See Designer Protection Part of Postwar Program Women's Wear Daily, May 12, 1943, p. 19.

and labor problems on a national basis they could contribute a great deal to the entire industry.

The trend towards the development of schools of design working in close cooperation with the industry has also led to more original and better quality design in the markets. It is also responsible for the development of specialized designs suited to the particular region in which the young designers train. University training alone is not sufficient, for it is necessary for the trainee to have some trade experience, preferably while studying, so that theory and practice may be combined. Students on graduation are readily employed by the manufacturers.

Another obvious trend is the establishment of fashion apparel marts. Nearly all regional markets have already made tentative plans for centralized marketing. A central fashion mart is becoming a necessity in the regional markets, for increased decentralization of production will necessitate centralization in marketing and distribution.

The importance and stress laid on promotion by the market associations, as well as the activities of the individual manufacturer, have shown that unity of purpose among manufacturers has resulted in increased sales and national recognition. Much of the promotion previously carried out is extravagant and should not be accepted indiscriminately; nor can it be assumed that the benefits of excessive promotion will proportionately increase. Certainly promotion must necessarily be changed. Consumer resistance to price and quality

is no longer a trend. The change from a seller's to a buyers market is a factor which can no longer be disregarded.

The definite trend in promotion of American fashions to the world is well established. American design matured during the war, and to make the most of this, individual markets will have to present a more united effort to sustain this prestige. America is, without doubt, the leader in mass production; and manufacturers from every country in the world have come here to study the methods of production developed by the United States. American manufacturers should not only be able to interpret American made designs in such a manner that they are wearable and economical for the American consumer, but also for women in all parts of the world. It is interesting to note that some Parisian designers have opened establishments in New York, and one or two are planning wholesale production of their creations. They have recognized a fertile field for their apparel in America. This may suggest the beginning of a trend which has implication of vital concern for the future of the apparel industry.

More attention than ever before is being given to improvement in sizing. The manufacturer of half-size apparel is increasing and proportionate sizing is being developed to a limited extent. It is interesting to note that the majority of American women are short and stocky and not tall and slender as previously taken for granted. Manufacturers are slow to enter these lucrative new size ranges. The extensive body-measurements survey of women and children,

carried out by the Bureau of Human Nutrition and Home Economics, constitutes an invaluable guide to the manufacturer, if he would but realize it. Proportionately sized garments would obviously increase sales, for there is no doubt but that improved sizing in ready-to-wear would be well accepted by thousands of consumers, who cannot satisfactorily be fitted in traditionally sized apparel.

These, then, are some of the main trends and factors which have significant implications for the future of the apparel industry. It remains but to say something of the opportunities this field offers to the research student, interested in any aspect of the garment industry.

FURTHER STUDIES

When commencing the investigation for this study, the author had considerable difficulty in deciding on some specific phase of the industry in which to carry out her research. Since visiting a number of the markets and writing this report, she is aware of the boundless possibilities, for educational research in this field. There are several different approaches to research in the field of clothing: these may be from the economic, educational, industrial, fashion, or general aspects. For the Home Economics graduate doing research in Textiles and Clothing the industrial and economic aspects of the garment industry have, no doubt, little appeal. However, there are many interesting possibilities in every branch of the industry.

ECONOMIC

Most research on the apparel industry has been economic in approach. Similar studies should be made today, because, of those available, very few are current reports. To concentrate on one market is no doubt the most satisfactory approach and, undoubtedly, considerable assistance would be given by the local manufacturers association. A few of the studies which come to mind under this heading are: 1) Decentralization of industry and its economic importance and future is of great interest to industry and consumer; 2) the economic importance of the ILGWU, and the labor problems which affect the industry; 3) seasonal fluctuations, their causes and what is being done by industry and management to overcome this drawback; 4) distribution and marketing; 5) the value and methods of costing garments before they go into production.

INDUSTRIAL

Scientific management has now become a profession, and an important factor in modern garment production offering lucrative positions to the trained industrial engineer. Research possibilities in this fairly new branch of the industry are extensive. There is need for research in time and motion studies, so important in modern scientific methods of production. Wage incentive and job evaluation plans can be worked out to suit the specific conditions of the garment industry. Additional studies of production methods and factory organization are other fields in which there are infinite possibilities for research. The types of machines used and their affect on

efficiency. A problem, of great interest to the industry, is methods of quality control used by firms with several factories or employing contractors; and how quality is affected by decentralization of operation. Again, studies under this heading are innumerable.

EDUCATIONAL

Around 1920, and again in the thirties, several surveys were made of the garment industry for vocational departments in an effort to determine teachable aspects of the needle trades, and ways by which labor could be interested in the industry. With the present shortage of needle workers, research should again be carried out in this field. The work and value of the many trade and vocation schools working in close cooperation with the industry would supply interesting data for a comparative study. Since the establishment of numerous schools of design, throughout the country, working cooperatively with industry, it would be desirable to study and evaluate their work and contribution to the characteristic styling of the markets.

FASHION

To approach the garment industry primarily from the fashion angle is, no doubt, of greater interest to the Textile and Clothing research student. A study of the American designers; their biography, style and method of design would make a contribution much needed by the industry and college alike. A fascinating subject for research is style piracy, which has existed in the apparel industry for over forty years. A study of advertising and promotion methods, their growth

and use in the apparel industry; a survey of the opportunities and positions for the college graduate in the apparel industry would be most interesting.

GENERAL

Detailed surveys of individual apparel markets, can be carried out and should be of value to both industry and the individual. The ILGWU, and the work it is doing, both for industry and members, is a highly controversial and interesting subject. Research in this field could be carried out readily, with, no doubt, considerable help and assistance by the union. A study of national brands in the apparel industry, their value to the consumer, and to industry, would also make an interesting study.

The collection of unpublished material on the industry for editing and publication, would be invaluable to colleges and industry alike. Of great value to universities would be a complete bibliography of all available literature.

Thus, the reader will realize that there is a tremendous scope for research on all subjects appertaining to the industry; research which could be of the greatest value, not only to industry, but also to colleges and the individual research worker. Of the many possibilities only a relatively few have been mentioned here; but others have, no doubt, come to the mind of the reader.

It is hoped that some of these suggestions will encourage further research which would be invaluable to all connected with the industry.

SUMMARY

This report is a general survey of regional apparel markets, written in the light of information and material obtained during a three months tour of investigation of the selected markets discussed. A considerable amount of material was also obtained through library research; and for those markets not actually visited, additional information was collected by correspondence.

Before commencing the discussion of the different apparel markets selected for this study, the breakdown of the apparel industry into its component parts, and the methods of production used in the regional markets are explained. This is essential before studying the regional markets where new methods of production are coming more and more into general use. There follows a brief history of the apparel industry from its early growth; beginning with the manufacture of "slops" and army clothing, through the period of sweated, immigrant labor to the improved conditions of today. The story of the organization of labor with its long and bitter strife, in the early part of the twentieth century, is also told. Because of the outstanding work of the ILGWU, its achievements since 1933 are briefly reviewed, and some explanation given of its various activities and departments.

The importance of the New York industry and its future are surveyed, with some mention of the technological progress made during World War II. The influence of the "parent" market on the regional

apparel markets and its place as a world center of fashion are also discussed.

Following the account of present day activities of the union, the regional apparel markets are reviewed. These markets are presented in their chronological order of development, since they did not appear hap-hazardly, but systematically as the needs of the people demanded. Cities where apparel manufacturing is carried on have a logical reason for their development into a large apparel market. They are situated in strategic geographical positions, eminently suited for distributing merchandise. They are able to supply, within a relatively small radius, hundreds of retailers.

Each market is discussed separately, its early history and development being given wherever possible. The different types of apparel manufactured, and their relative volume sales are briefly stated. Much space is devoted to the aims and activities of the local market associations and their influence on the growth of the market. An effort has also been made to give some explanation of the reasons for the specialization of product which has occurred in some markets, and how this has affected their development.

There follows a discussion of the promotional activities engaged in by individual manufacturers; new selling techniques coming into use; and something is said of the selling aids being supplied to the retailer by the manufacturer. Some mention is also made of the growing importance of national advertising and national brands, and the value of these to the individual markets and manufacturers.

Closely allied with promotion activities which contribute towards the recognition of individual markets is the work of fashion publications and newspapers, and of the retailer. As a result, some mention of their activities in the market is also made. A short section is devoted to the work and organization of the Fashion Group Inc., because of its importance and growing influence in the world of fashion.

Schools of Design in the leading apparel cities, working cooperatively with industry, are discussed at some length, because they play an increasingly important part in the development of specialized characteristics appearing in regional designing.

Finally, an attempt is made to point out some of the major "trends and prospects" of the garment industry. The possibilities of piracy control; increased export; the effect of the decentralization in manufacture and centralization of marketing in the industry; improvements brought about by wartime controls; and many other factors pertinent to the apparel industry are briefly touched upon. In conclusion, the possibilities of research in this very large and practically untapped field, are listed, hoping they may instigate further, much needed, research.

TABLE I THE DRESS INDUSTRY ¹

MARKET PLANNING SERVICE			-- 1946	U. S. CENSUS -- 1939		
	No. of Concerns	% of Total Concerns	Sales	% of Total Sales	Sales	% of Total Sales
New York.....	2,376	64.6%	\$1,273,561,000	66.8%	\$437,158,000	64.0%
Chicago.....	179	4.9	101,790,000	5.3	35,765,000	5.2
Los Angeles.....	314	8.5	100,261,000	5.3	13,439,000	2.0
Philadelphia.....	151	4.1	81,125,000	4.2	41,439,000	6.1
St. Louis.....	67	1.8	46,086,000	2.4	11,193,000	1.6
Boston.....	109	3.0	44,321,000	2.4	14,701,000	2.2
Cleveland.....	23	0.6	30,493,000	1.6	6,198,000	0.9
Dallas.....	43	1.2	23,115,000	1.2	*	*
Kansas City.....	28	0.8	18,569,000	1.0	6,974,000	1.0
Milwaukee.....	10	0.3	16,040,000	0.8	*	*
San Francisco.....	39	1.0	14,079,000	0.7	3,161,000	0.5
Cincinnati.....	11	0.3	11,457,000	0.6	2,027,000	0.3
Total.....	3,350	91.1%	\$1,760,897,000	92.3%	\$572,055,000	83.8%
All Other Markets.....	329	8.9	146,717,000	7.7	110,577,000	16.2
GRAND TOTAL.....	3,679	100.0%	\$1,907,614,000	100.0%	\$682,632,000	100.0%

*See next page.

*Not separately reported.

The entire volume of each manufacturer has been credited to that market where headquarters are located. This differs from the Census practice of crediting sales to each factory location.

In the analysis of each of the markets, Market Planning Service has included all manufacturers within a radius of approximately thirty miles. The Los Angeles market, for example, contains concerns in Alhambra, Beverly Hills, Burbank, Long Beach and Pasadena.

- 1 Market Planning Service, The Dress Industry
op. cit., p. 22.

TABLE II THE WOMEN'S COAT AND SUIT INDUSTRY¹

	No. of Concerns	% of Total	1947 Sales	% of Total	1946 Sales	% of Total	*1939 Sales	% of Total
New York	1,102	65.4%	\$709,408,000	73.8%	\$745,058,000	74.1%	\$229,676,000	75.0%
Los Angeles	179	10.6	57,857,000	6.0	60,540,000	6.0	9,815,000	3.2
Chicago	67	4.0	29,729,000	3.1	32,035,000	3.2	11,292,000	3.7
Boston	102	6.1	26,295,000	2.7	38,505,000	3.8	7,818,000	2.6
San Francisco	40	2.4	22,798,000	2.4	25,104,000	2.5	2,302,000	0.7
Philadelphia	31	1.8	17,172,000	1.8	16,459,000	1.6	7,574,000	2.5
Cleveland	14	0.8	15,664,000	1.6	14,025,000	1.4	5,708,000	1.9
Kansas City	20	1.2	15,137,000	1.6	13,484,000	1.4	3,556,000	1.1
Baltimore	12	0.7	12,933,000	1.3	11,112,000	1.1	4,650,000	1.5
Total	1,567	93.0%	\$906,993,000	94.3%	\$956,322,000	95.1%	\$282,391,000	92.2%
All Other	118	7.0	54,811,000	5.7	49,097,000	4.9	23,726,000	7.8
GRAND TOTAL	1,685	100.0%	\$961,804,000	100.0%	\$1,005,419,000	100.0%	\$306,117,000	100.0%

*Source: U.S. Bureau of the Census

As in our previous survey, the entire volume of each manufacturer has been credited to that market where headquarters are located. This differs from the Census policy of crediting sales to each factory location.

¹ Market Planning Service, The Women's Coat and Suit Industry, op. cit., p. 12.

TABLE III. WHOLESALE PRICE RANGES FOR EACH GARMENT TYPE IN THE STREET DRESS¹

	Rayon	Cotton	Wool
Popular	up to \$7.75	up to \$5.75	up to \$8.75
Medium	\$8.75-\$14.75	\$6.75-\$9.75	\$9.75-\$16.75
Better	\$16.75 and up	\$10.75 and up	\$18.75 and up

1 The Dress Industry op. cit. p. 17. This is the only classification available.

TABLE IV. DRESS INDUSTRY (a)(b)

	New York	Chicago	Los Angeles	Philadelphia	St. Louis	Boston	Cleveland	Dallas	Kansas	Milwaukee
										City
Popular Priced										
Number of firms	1,092	44	63	104	47	48	9	10	8	2
% of Market Total	37.9	25.0	21.2	57.4	36.7	43.8	32.96	15.5	28.1	2.4
Medium Priced										
Number of firms	1,281	137	242	65	54	65	16	37	24	7
% of Market Total	48.6	67.0	68.0	42.6	56.9	54.0	66.4	84.5	70.3	94.8
Better Priced										
Number of firms	290	25	48		6	6	2		2	1
% of Market Total	13.5	8.0	10.8		6.4	2.2	0.7		1.6	2.8

a) Number of firms by grades manufactured.

b) Percentage of market total

Dress Industry op. cit.

TABLE V. WOMEN'S COAT AND SUIT INDUSTRY (a)(b)

	New York	Los Angeles	Chicago	Boston	San Francisco	Phila- delphia	Cleveland	Kansas City	Balti- more	All other Markets	Total
Popular Priced											
Number of firms	441	55	9	22	10	12	2	12	5	46	594
% of Market Total	32.4	22.6	3.9	12.1	8.4	33.8	1.2	74.6	64.9	48.9	
Medium Priced											
Number of firms	648	116	56	88	30	21	13	11	7	82	1,072
% of Market Total	46.4	58.4	49.5	73.0	71.9	25.2	79.9	25.4	33.6	42.5	
Better Priced											
Number of firms	268	54	29	18	10	12	7	2	3	24	427
% of Market Total	21.2	19.0	46.6	14.9	19.7	41.0	18.9	*	1.5	8.6	

a) Number of firms by grades manufactured

b) Percentage of market total.

Women's Coat & Suit Industry op. cit.

TABLE VI. THE DRESS INDUSTRY

Number of firms using contractors, or operating their own plants

	New York	Chicago	Los Angeles	Philadelphia	St. Louis	Boston	Cleveland	Dallas	Kansas City	Milwaukee	San Francisco	San Antonio	Other Markets	Total
Operate own plant	752	151	252	122	55	72	23	39	28	10	29	10	302	1,845
Use Contractors	1,400	21	50	23	4	28		4			10	1	22	1,563
Own and Contract	224	7	12	6	8	9							5	271
TOTAL	2,376	179	314	151	67	109	23	43	28	10	39	11	329	3,679

Dress Industry op. cit.

TABLE VII. WOMEN'S COAT AND SUIT INDUSTRY

Number of firms using contractors, or operating their own plants

	New York	Los Angeles	Chicago	Boston	San Francisco	Phila- delphia	Cleve- land	Kansas City	Balti- more	Other Mar- kets	Total
Operate own plant	425	166	43	46	31	25	12	19	12	109	888
Use Contractors	503	10	21	49	8	2	2			7	600
Own and Contract	174	3	3	7	1	4	2	1		2	197
TOTAL	1,102	179	67	102	40	31	14	20	12	118	1,685

Women's Coat & Suit Industry op. cit.

TABLE VIII. UNIT VOLUME SALES IN THE WOMEN'S APPAREL INDUSTRY¹

(All values expressed in thousands of dollars)

	Dresses	Coats and Suit	House dresses	Sportswear	Knitted Sports- wear	Rainwear	Lingerie- Underwear	Robes	Neckwear	Uniforms	Total
New York	746,500	387,728	45,375	222,256	68,000	24,783	131,910	35,493	16,600		1,678,645
Chicago	76,700	33,200	51,600	37,800			28,000				327,300
Los Angeles	36,600	32,300		and rain wear 117,700	9,500		Intimate ap- parel and ac- cessories 4,000				196,100
Boston	31,300	15,000	and ap- rons 5,700	70,000			1,200				126,200
Philadelphia	36,200	10,250		32,358			4,618	2,450	300	5,600	91,776
St. Louis	46,750	5,300		5,000			3,500				60,550
Cleveland	17,700	13,200		and rain wear 13,000			1,500				55,400
San Francisco	12,000	14,000		20,000			4,000				50,000
Twin Cities Minneapolis	10,800	300		6,100			and hoisery 24,000				49,800
St. Paul		1,000		4,000						900	
Dallas	11,000	3,800		18,000			1,400				34,200
Kansas City	13,923	7,340		2,700			600				30,523
Milwaukee	15,000			7,250	700						22,950
Pacific North-West Portland	300	2,500		6,000							14,900
Seattle	3,000	600		2,500							
Baltimore	4,100	and skirts 8,900									13,000
Miami	1,000	1,500		7,500							10,000
Cincinnati	5,000	2,250									7,330
Atlanta	6,000						300			500	6,800
TOTALS	1,066,653	538,868	102,675	574,164	73,200	25,083	204,028	37,943	16,900	7,000	2,775,474

¹ Source: Apparel Markets 1947, op. cit.

TABLE IX. DOLLAR SHIPMENTS BY AREA FOR WOMEN'S, MISSES' AND JUNIORS' OUTER APPAREL FOR THE FIRST SIX MONTHS OF 1947, AND 1948¹

All value figures are expressed in thousands of dollars.

	Cumulative Total		Percentage distribution	
	Jan-June 1948 (Preliminary)	Jan-June 1947	Jan-June (Preliminary)	Jan-June 1947
United States Total	1,288,329	1,555,525	100.0	100.0
New York	878,899	820,475	68.2	69.4
Chicago	57,109	50,901	4.4	4.4
Philadelphia	35,234	30,347	2.7	2.6
St. Louis	32,658	26,017	2.5	2.3
Cleveland	22,270	19,483	1.7	1.7
Boston	31,744	25,986	2.5	2.3
Los Angeles	49,210	43,924	3.8	3.8
Kansas City	14,658	12,689	1.2	1.1
San Francisco	12,367	11,931	1.0	1.0
All Other Areas	154,180	131,773	12.0	11.4

¹ U. S. Bureau of Census, Facts for Industry Series
October 25, 1948, p. 4.

ADDRESSES OF MARKET ASSOCIATIONS

Chicago

Miss E. Livingstone, Promotion Director,
Chicago Fashion Industries Inc.,
Suite 945 Merchandise Mart,
222 North Bank Drive,
Chicago 54, Illinois.

Cleveland

Maurice Saltzman, President,
Associated Feminine Apparel Industries of Cleveland,
2230 Superior Avenue,
Cleveland 14, Ohio.

Dallas

Mrs. Alma Cunningham, Manager,
Dallas Fashion and Sportswear Center,
1101 Commerce Street,
Dallas, Texas.

Kansas City

Robert D. Palmer, Executive Director,
Kansas City Apparel Association,
212 Merchandise Mart,
Kansas City 8, Mo.

Los Angeles

Edmund McKanna, Executive Director,
or Miss Eve Crane, Publicity Director,
California Apparel Creators, Inc.,
756 S. Broadway,
Los Angeles 14, California

Miami

J. H. Perper, Managing Director
Miami Fashion Council,
Chamber of Commerce Building,
Miami, Florida.

Minnesota

T. C. Cook, Managing Director,
Minnesota Apparel Industries, Inc.,
Dyckman Hotel,
Minneapolis 2, Minnesota.

Pacific North West

W. F. Lubersky, Executive Secretary,
Pacific Northwest Apparel Manufacturers Association,
802 Northern Life Tower,
Seattle 1, Washington.

Philadelphia

William B. Flickstein, Secretary,
Philadelphia Clothing Manufacturers' Association,
215 South Broad Street,
Philadelphia, Pa.

St. Louis

Miss Joan Gardner, Promotion Director,
St. Louis Fashion Creators, Inc.,
Room 1330, Paul Brown Building,
818 Olive Street,
St. Louis, Mo.

San Francisco

Robert Feldhammer, Executive Secretary,
or Miss N. Peppin,
Manufacturers and Wholesalers Association of San Francisco,
26 O'Farrell Street,
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Wisconsin

Charles T. McElroy, Executive Director,
Wisconsin Apparel Manufacturers, Inc.,
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Milwaukee 3, Wisconsin.

Fashion Group: National Headquarters

Mrs. Ethel M. Kremer, Executive Director,
The Fashion Group Inc.,
9 Rockefeller Plaza,
New York 20, N. Y.

New York

International Ladies' Garment Workers' Union
1710 Broadway
New York 19, N. Y.

APPENDIX

MARKET SLOGANS & LABELS

<u>Chicago</u>	"Where Skill is a tradition."
<u>St. Louis</u>	"Fashions by Young Americans for Young Americans." "St. Louis, city of Young Fashions."
<u>Kansas City</u>	"Fashions for the Middle Millions." "The Modern Methods Market."
<u>San Francisco</u>	"Made in California." Made in Apparel City.
<u>Los Angeles</u>	"Something happens when you wear clothes from California."
<u>Wisconsin</u>	"Wisconsin made means Quality made." "When you think of things to wear--Wisconsin takes the lion's share."
<u>Minnesota</u>	"Minnesota Inspired" "Nature's laboratory."
<u>Dallas</u>	"The market of Young ideas." "Fashions with a Future."
<u>Miami</u>	"Fashions from the Fountain of Youth." Styled and made by a member of the Miami Fashion Council.

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