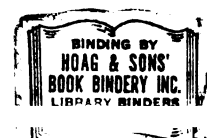


A SURVEY OF THE PORTLAND APPAREL
MARKET THROUGH AN INVESTIGATION
OF SELECTED APPAREL MANUFACTURERS

Thesis for the Degree of M. A.
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JOANNE BERTHA EKENES
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THESIS



ABSTRACT

A SURVEY OF THE PORTLAND APPAREL MARKET THROUGH AN INVESTIGATION OF SELECTED APPAREL MANUFACTURERS

By

Joanne Bertha Ekenes

An initial study of the northwestern region, this survey of the Portland Apparel Market adds to the larger investigation of regional apparel markets presently in progress by the Textiles, Clothing and Related Arts Department, College of Home Economics, Michigan State University. The purpose was to discover the development of the market, the current status of the market, the growth potential and predictions of the future.

A representative group of manufacturers, influential in the Portland Market, was selected to respond to a structured interview schedule designed to reveal information concerning: The structure, organization and operation of apparel firms; production and distribution of apparel items; and promotion, marketing and extent of the market. Present trends and future predictions were analyzed to help determine the significance of the market.

The production of active sportswear and casual clothes is considered by executives, designers and promotional

directors to be of major importance in making Portland distinctive as a regional market. Members of the sample indicated the climate and terrain of the Pacific Northwest create an atmosphere appropriate to the production of sportswear.

Manufacturing firms in the Portland area are divided in size into very small and very large firms both in number and yearly wholesale volume. One-third of the firms employ under 50 persons and have a yearly wholesale volume under \$500,000 while another third employs over 500 persons and realizes a yearly wholesale volume over \$5,000,000. Several firms own subsidiary production plants, the majority being in the Northeast or Southeast of the United States. Most firms utilize the "in-side shop" method of production of a 12 month basis.

Firms in the Portland Apparel Market produce a wide range of apparel items for men, women and children of all ages. "Sportswear" was the term most manufacturers felt described the majority of the apparel items produced in Portland. Distribution by truck, railroad and air is most frequently to retail outlets such as department stores and specialty shops.

Apparel is usually designed by local designers or owners of firms. In a few instances, designers in New York are hired to create fashions for the western firms. About one-half of the firms hire designers to create pattern and

color combinations for woven and knit fabrics which are used for apparel production or sold by the bolt.

Private seasonal showings are held by the majority of manufacturers twice a year. The two most popular showings are held in the Spring and Fall when two to five collections are presented.

Representatives of the firms consider the future of the Pacific Northwest good to excellent as a regional market. "New designs in sportswear" and "distinctive quality" were mentioned as major contributions to the national apparel industry.

Information regarding possible future developments indicates a number of Portland apparel manufacturers will probably expand in the next five years. Most of the firms have tentative plans for expansion to take place before 1973. Portland's potential for growth as a regional market was optimistically regarded as "unlimited."

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A THESIS

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CHAPTER I

INTRODUCTION

Statement of the Problem

The apparel industry has become a major part of the United States' economy. The production of apparel for both men and women has turned into a billion-dollar industry.¹ Although facilities for production and distribution are principally in the Northeast and none can compare with New York as a fashion center, smaller regional markets are growing in both size and importance throughout the nation.

The Portland apparel market, although a smaller part of the Pacific Northwest regional market, contributes substantially to the national apparel industry. Portland is a progressive industrial city in the West and claims to be a leader in sportswear manufacturing.² Being the home of four of the largest sportswear manufacturers in the nation, Portland contributes not only great quantities of apparel items but adds great flavor and color to the ready-to-wear

¹Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York: John Wiley and Sons, Inc., 1965), p. 53.

²Gertrude Cain, The American Way of Designing (New York: Fairchild Publications, 1950), p. 112.

industry.³ In addition to the specialty in sportswear, Portland also accredits its manufacturers with variety and diversification in apparel production.

Much of Portland's success as an apparel market can be attributed to its geographic location. The Pacific Northwest is a region of great natural beauty and year-around recreational climatic conditions which provide a setting for the nation's sports enthusiasts.

Nowhere in these United States can be found so many varieties of natural beauty--rolling wheat lands, sagebrush, snowcapped mountains reaching into and above the clouds, endless miles of dark, cool evergreen forests, mountain lakes high in rugged mountains, sometimes surrounded by snow the year around, rushing streams and mighty rivers. All of these have contrived to make the Pacific Northwest a sportsman's paradise.⁴

The growth of the region as a sports center and utilization of the outdoor facilities has been accompanied by a parallel growth in apparel manufacturing.

Northwest apparel manufacturers have developed types of clothing, particularly sportswear, identifiable with the area. In the past, the Pacific Northwest had been known principally for heavy outerwear and swimwear which was produced to be distributed nationally by prominent firms. Today these manufacturers have grown so large they now operate

³Portland Chamber of Commerce, Research and Statistics Section, Industrial Development Department, Living Conditions in Portland 1966-1967 (Portland Chamber of Commerce, Publisher, 1967), p. 4.

⁴W. F. Lubersky, "Pacific Northwest, Portland and Seattle," Apparel Markets, 1948, p. 171.

branches in other parts of the country and world. Sport and utility items are the major garment items produced, but trousers, rainwear, baby clothes, suits and coats are also produced or made by the Seattle and Portland area apparel plants.

Because of the Northwest's growing importance in the national apparel industry, this study has undertaken an examination of one part, the Portland Apparel Market. The purpose of this investigation was to survey the production of apparel in Portland, examining the development, organization and structure. The current status of the Portland Apparel Market was analyzed in relation to production and distribution of apparel items. The significance of the market, the contribution of the Portland area to the nation's production of apparel and future trends of growth and development were considerations of this study.

Review of Literature

Regional apparel markets have generally been overlooked by researchers in the past. Griffin surveyed selected regional apparel markets within the national apparel industry. She investigated each market as to its history, development and promotional activities. Because of the number of markets involved, Griffin's study was an overview from which more recent studies of a single regional market have emerged.⁵

⁵Tira W. Griffin, "A Survey of Selected Regional Apparel Markets Producing Women's and Misses' Apparel" (unpublished Master's thesis, Michigan State University, 1949).

Dallas, Texas, a fashion center in the Southwest, has been surveyed and investigated more than any other single regional market outside New York. An early study on the Dallas Apparel Market in relation to the national and international importance of the market was conducted by Gano in 1947.⁶ The history and development of the United States' Apparel Industry and the increase of regional markets outside New York (particularly Texas) was reviewed by Johnson.⁷ Adams examined the influence of public relations and promotional activities in the development and growth of the Dallas Apparel Market.⁸

More recently, Golly⁹ surveyed the Dallas Apparel Market as part of a larger study being conducted by Nugent¹⁰ at Michigan State University. Golly attempted to discover

⁶Lowell R. Gano, "The Women's and Misses' Apparel Industry in Dallas, Texas" (unpublished Master's thesis, Southern Methodist University, Dallas, 1949).

⁷Elton Davis Johnson, "Women's Outerwear Industry in Texas" (unpublished Doctoral dissertation, The University of Texas, Austin, 1954).

⁸Margaret Adams, "Public Relations Activities as a Contributing Factor to the Growth and Development of the Dallas Fashion Market" (unpublished Master's thesis, Department of Home Economics, The University of Texas, 1958).

⁹Jeanne Marie Golly, "A Survey of the Present Status of the Dallas Women's Apparel Market" (unpublished Master's thesis, Michigan State University, 1966).

¹⁰Elinor R. Nugent, "The Production and Distribution of Apparel and Related Products in the Regional Markets within the National Apparel Industry," Michigan Agricultural Experiment Station Project No. 758. Research in Progress.

the present status of the market through an examination of the structure and operation of the firms, types of apparel produced, distribution and promotion of apparel and the extent of the market. A growing concern with the growth of apparel manufacturing in the Southeast led to investigations in that region.

The economic importance and the reasons for location of the fashion apparel industry in Alabama were the concern of Bourne.¹¹ It was concluded that fashion apparel production is economically important to Alabama and the female labor supply was considered the primary reason for location of firms within Alabama. Hersker analyzed the apparel manufacturing industry in Florida in 1962.¹² He investigated the growth, status and relationship of Florida's production of apparel to the national industry. He further suggested a profitable course for future development in Florida. Additional studies have been conducted in other regional markets.

Goodman surveyed the apparel manufacturing and

¹¹Judith Mayton Bourne, "An Analysis of the Development of the Fashion Industry in Alabama, 1949-1962" (unpublished Master's thesis, Auburn University, Auburn, Alabama, 1962).

¹²Barry Jay Hersker, "The Women's Apparel Manufacturing Industry in Florida" (unpublished Doctoral dissertation, The University of Florida, 1962).

marketing facilities in California.¹³ Gross discussed trends in the dress industry in St. Louis in another earlier study.¹⁴ Mason explored the production of apparel in Michigan. Location of apparel firms, structure and organization, types of apparel produced, marketing facilities, extent of the market and factors influential in the expansion of production were facets of Mason's study.¹⁵

Apparel manufacturing in Hawaii and neighboring islands has been investigated by Fundaburk.¹⁶ Apparel firms were surveyed with respect to employment characteristics, production costs, location advantages and disadvantages, and marketing conditions within the area.

In 1964 at the Tripartite Technical Meeting for the Clothing Industry, Geneva, the International Labour Office reported on the economic problems arising from fluctuations of employment in the clothing industry and its effects on

¹³Charles S. Goodman, "The Location of Fashion Industries with Special Reference to the California Apparel Market," Michigan Business Studies, Vol. X, No. 2 (Ann Arbor, Michigan: University of Michigan Press, 1959).

¹⁴Blanche Gross, "The Awakening of an Industry. Recent Trends in the Dress Manufacturing Industry in St. Louis" (unpublished Master's thesis, School of Business, Columbia University, 1943).

¹⁵Mary Martell Mason, "A Survey of the Present Status of the Michigan Apparel Industry" (unpublished Master's thesis, Michigan State University, 1968).

¹⁶Emma Lila Fundaburk, "Characteristics, Problems and Potentials of Apparel Manufacturing in Neighboring Islands," Economic Research Center, University of Hawaii, 1966.

the national economy as a whole. They further proposed measures to reduce fluctuations in employment and improve the organization of the employment market.¹⁷

Smaller studies on segments of the apparel industry at Michigan State University were conducted as part of the larger project on regional markets.¹⁸ Stauber focused on the American designers in New York City and their place in the development of the American fashion apparel industry.¹⁹ Kilbourne investigated the custom design firms in Michigan and their contribution to the Michigan Apparel Industry.²⁰ The women's knit and outerwear and lingerie industry in Reading-Berks County, Pennsylvania, was examined by Desjardins.²¹ Production, distribution, future growth potential and the contribution of the Reading-Berks County

¹⁷International Labour Office, Tripartite Technical Meeting for the Clothing Industry, Problems Arising from Fluctuations of Employment in the Clothing Industry (Geneva, 1964).

¹⁸Nugent, op. cit.

¹⁹Elaine C. Stauber, "A Study of the Creative Methods of American Designers and Their Contributions to the Fashion Apparel" (unpublished Master's problem, Michigan State University, 1966).

²⁰Helen Margaret Kilbourne, "A Study of a Selected Group of Custom Design Firms within the Michigan Apparel Industry" (unpublished Master's problem, Michigan State University, 1966).

²¹Andrea Ruth Desjardins, "The Production and Distribution of Women's Knit Outerwear and Lingerie by Firms in the Reading-Berks County, Pennsylvania Market Area" (unpublished Master's problem, Michigan State University, 1967).

area market to the apparel industry of the United States were considerations of that study.

Other descriptive investigations have been undertaken and reported in books written by such authors as Arnold and White,²² Cain,²³ Crawford,²⁴ Chambers,²⁵ Jarnow and Judelle,²⁶ Nystrom,²⁷ Levin,²⁸ and Roscho.²⁹ These works cover the apparel industry in a general manner with reference to fashion designers, apparel production, retailing, unions and consumption. Numerous functions within the industry as well as discussions of the influence of the apparel industry on outside factors such as the national economy, the national labor force and world markets are included.

The importance of the regional markets was presented

²²Pauline Arnold and Percival White, Clothes and Cloth (New York: Holiday House, 1961).

²³Gertrude Cain, The American Way of Designing (New York: Fairchild Publishing Company, 1950).

²⁴M. D. C. Crawford, The Ways of Fashion (New York: Fairchild Publishing Company, 1948).

²⁵Bernice G. Chambers, Fashion Fundamentals (New York: Prentice-Hall, Inc., 1947).

²⁶Jarnow and Judelle, op. cit.

²⁷Paul Nystrom, Economics of Fashion (New York: Ronald Press Co., 1928).

²⁸Phyllis Lee Levin, The Wheels of Fashion (New York: Doubleday and Company, 1965).

²⁹Bernard Roscho, The Rag Race (New York: Funk and Wagnalls Company, Inc., 1963).

by Hall in his book, Made in New York.³⁰ Hall related the trends toward development of regional markets and decentralization of apparel production in the late 1950's.

Importance of the Study

To date, few studies of apparel markets within the ready-to-wear garment industry of the United States are available. Griffin surveyed regional apparel markets and indicated more detailed studies of single markets would be of value.³¹ Golly, in her study of the Dallas Apparel Market, suggested that in-depth studies of many regional markets would contribute to existing knowledge and be of importance to educators, businessmen and industry.³² Mason also recommended in her study of the Michigan Apparel Industry that investigation of other regional markets would permit comparative studies of regional markets and help to establish the contribution of regional markets in the national apparel industry.³³

The Portland Apparel Market has expanded along with a climbing growth in population. From 1960 to 1965, the population of the Portland metropolitan area increased over

³⁰Max Hall (ed.), Made in New York (Cambridge, Massachusetts: Harvard University Press, 1959).

³¹Griffin, op. cit., p. 244.

³²Golly, op. cit., p. 111.

³³Mason, op. cit., p. 65.

forty per cent.³⁴ The Portland apparel industry was able to absorb a large part of this increase through employment of additional labor. Production volume from 15 to 25 million dollars has been reported during the period from 1958 to 1963.³⁵ Such rapid growth seems to suggest Portland is gaining both in size and importance as a contributor to the total apparel industry.

A study of the Portland Apparel Market would provide specific information about a growing market and help to further insight into the development of regional apparel markets. This study would add to the growing store of information with regard to apparel production which would be helpful to educational, industrial business and governmental personnel involved in the apparel industry. Additional knowledge may also be of assistance to others as a guideline to furnish suggestions for future investigations of major or secondary apparel markets.

³⁴Portland Chamber of Commerce, Research and Statistics Section, Industrial Development Department, Living Conditions in Portland 1966-1967 (Portland Chamber of Commerce, Publisher, 1967), p. 1.

³⁵U.S. Bureau of the Census, Census of Manufacturers, 1963, Preliminary Report, Area Series: Washington and Oregon, Vol. III (Washington, D.C.: U.S. Government Printing Office, 1966), p. 38-3.

CHAPTER II

METHODOLOGY

Research Design

The purpose of this study was to obtain information about the production of wearing apparel by manufacturing firms in the Portland area of the Northwestern region of the United States. Such information would give valuable insight into the current status of the Portland area as an apparel market and its contribution to the national apparel industry.

First a broad exploration was made of the various aspects of apparel production and distribution, descriptive of the present status of a particular market. Secondly, the data were used to evaluate the potential growth and future development of the Portland apparel industry and indicate the importance and significance to the national apparel industry.

Because no intense research of this market has been conducted, an initial study must be a descriptive and exploratory survey. Kerlinger describes survey research as that branch of social scientific investigation that studies large and small populations (or universes) by selecting and studying samples chosen from populations to discover the

relative incidence, distribution and interrelations of selected variables.¹

Development of the Instrument

To gain depth and understanding of the Portland Apparel Market, the interview method of obtaining data was chosen. Kerlinger points out that the interview permits probing into the context of, and reasons for, answers to questions.² He also states the most successful examples of survey research utilize the personal interview as the principal method of gathering information.³

In order to make the interview schedule adaptable and capable of being employed with various kinds of respondents, the questions used were fixed-alternative or closed, open-ended and scale item types. Kerlinger states that all three types of items should be included in an instrument for sounding people's behavior patterns, future intentions, feelings, attitudes and reasons for behavior.⁴

Fixed-alternative or closed questions were used to achieve greater uniformity of measurement and thus attain greater reliability. These questions were primarily aimed

¹Fred N. Kerlinger, Foundations of Behavioral Research (New York: Holt, Rinehart and Winston, Inc., 1967), p. 392.

²Ibid., p. 468.

³Ibid., p. 395.

⁴Ibid., p. 476.

to obtain descriptive data of the Portland Apparel Market.

The open-ended items were included in the instrument to make better estimates of the respondent's true attitudes on various aspects of the Portland Apparel Market. Often a "funnel" type of item was useful, starting with a broad question, narrowing down progressively to an important point. Follow-up open-ended questions achieved greater depth.

Scale items obtained an expression of various degrees of agreement, disagreement and attitudes. The respondents were able to rank phenomena according to their own preferences and attitudes. These items were helpful in securing information which might be unique to each apparel manufacturer or production plant.

A review of instruments from other studies was of assistance in the selection of items for questioning. The actual subject matter content of the instrument was suggested by instruments from previous studies but was adjusted to this particular region (locale). The instrument was constructed to secure information which would satisfy the research objectives and be of value in future apparel market studies.

Pretest

The pretest is a method of testing the interview schedule for clarity and validity. Ahmann and Glock point out the perfect instrument must serve the purpose or purposes for which it was intended and in doing so, must produce

consistent information.⁵ To achieve consistency, the interview schedule was pretested in East Lansing, Michigan, by administering it to one retail buyer, two retail salesmen, one department store manager, one testing and measurement expert and two clothing graduate students.

The pretest helped to provide the researcher with experience in interviewing and presenting questions to obtain information. Also the pretest served to check the interpretations made by respondents and the length of the interview schedule.

After the pretest, minor changes were made in the order of the items contained in the instrument. Greater ease in administration and clarity were gained with the altered sequence. The instrument was considered ready for use in the collection of data for the Portland Apparel Market survey.

Selection of the Sample

The sample was obtained by first securing a list of all apparel manufacturers in the Portland area from the Portland Chamber of Commerce.⁶ A letter was sent to every

⁵J. Stanley Ahmann and Marvin D. Glock, Evaluating Pupil Growth (Boston: Allyn and Bacon, Inc., 1967), p. 314.

⁶Portland Chamber of Commerce, Industrial Development Department, Classified List of Textile and Apparel Products in the Portland Area (Portland Chamber of Commerce, 1966).

firm on the list explaining the purpose and importance of the study. Each manufacturer was asked to participate in the study and to grant an interview (Appendix A). Then appointments were to be made by telephone at a future date.

By the time the interviews were scheduled, the researcher found several firms had recently retired from the industry, changed names or moved to other parts of the United States. Twelve firms (48 per cent of the total asked) agreed to participate in this study and granted appointments for interviews when approached through telephone calls.

Description of the Sample

The manufacturing firms participating in this study varied in size from small companies to large corporations. In several firms, one or two persons were able to carry out all functions within the firm from the designing and construction of the garments to the distribution of the finished products. In some firms one executive was responsible for all of the managerial functions of the production, distribution and promotion, while a designer created the garments for the collections. In the larger firms each task such as designing, promotion or managing a particular operation was carried out by a designated person. Garments and apparel items were actually constructed by workers on an assembly line.

From the twelve manufacturing firms participating, 22 adults were selected to be interviewed by purposive

sampling. These interviewees included 12 executives, three designers, and seven promotional directors.

The questionnaire was in five parts: the first three parts were directed to managerial executives; the fourth part consisted of questions for designers; and the last part was directed to promotional directors. In instances where one person performed two or more functions, that person acted as the respondent for the parts of the interview pertaining to those functions.

Method of Analysis

The information concerned with the Portland Apparel Market gained from the interview schedule was summarized for presentation. Because the interview schedule was highly structured, most of the responses were coded prior to the analysis. Uncoded responses were compiled for description of the market area. All data were tabulated to facilitate analysis. Tables were included in the presentation to compile information in a visual form for rapid review of the data.

In order to respect the wishes of the executives and persons interviewed, the data are presented in anonymous form.

Definition of Terms

To facilitate an understanding of this presentation of the Portland Apparel Market, specific terms which have

been used have been defined.

Apparel refers to articles of clothing and accessories produced for consumers. Ready-to-wear is apparel which is mass produced as opposed to apparel made to order (custom made).⁷ The firms which produce the various categories of apparel make up the apparel or garment industry.

Style in this study refers to a particular cut, design or type of apparel article distinctive or characteristic of a typical mode.⁸ Design is then the arrangement of parts, form, line, color, etc., of the style.⁹ The artist who creates original designs, evolving new concepts and creative ways of reexpressing basic aesthetic principles in apparel, is the designer.¹⁰

A line is a group of similar styles created by a designer. Any number of lines make up a collection which is exhibited at a formal presentation or showing to prospective buyers.

An apparel market is made up of manufacturers producing a particular type of apparel for which there is a demand. Regional market refers to the apparel manufacturers

⁷Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York: John Wiley and Sons, Inc., 1965), p. 264.

⁸Mary Brooks Picken, The Fashion Dictionary (New York: Funk and Wagnalls Company, 1957), p. 338.

⁹Jarnow and Judelle, op. cit., p. 263.

¹⁰Ibid., p. 43.

in a particular geographic region.¹¹ The Portland Apparel Market is a particular geographic location constituting a demand for apparel products, specifically the Portland Metropolitan area. In this study, the Pacific Northwest refers to the area of the United States which includes the states of Oregon and Washington.

Within the garment industry, there are several types of manufacturing plants. Some firms produce apparel in their own plants while others do not; therefore it becomes necessary to distinguish between them. Those firms which produce garments made of textile fabrics cut, sewn and finished within their own facilities or plant are of the "inside shop" type of manufacturers. The jobber is a specialist in buying raw materials and in selling finished products, leaving all manufacturing operations of cutting, sewing, and finishing for other concerns.¹² The contractor does the sewing and finishing for other producers. These contracting or "outside shops" employ operators and produce to the specifications of others such as jobbers who hire their services.

Promotion of the goods produced becomes a major function in any major industry. The promotional director of

¹¹Jeanne Marie Golly, "A Survey of the Present Status of the Dallas Women's Apparel Market" (unpublished Master's thesis, Michigan State University, 1966), p. 12.

¹²Paul H. Nystrom, Economics of Fashion (New York: The Ronald Press Company, 1928), p. 442.

an apparel firm is in charge of all forms of advertising, selling aids, publications and press releases concerned with the promotion of the products produced by that firm.

CHAPTER III

APPAREL FIRMS IN THE PORTLAND APPAREL MARKET

This survey of the Portland Apparel Market was conducted through an investigation of selected apparel firms in the area. The information obtained from interviews with members of these firms was used to describe the Portland Apparel Market. This chapter presents characteristics of the apparel firms in three main categories: 1) physical structure and organization, 2) operations and 3) personnel.

The first section presents the physical structure and organization of the firms and includes the growth, development, size and location of the plants included in this study.

Methods of production, distribution of products and the source of materials used by the selected manufacturers are included as aspects of the operations of the firms in the Portland area.

The third section is devoted to the personnel within the firms. The division of responsibilities, the organization of employees, functions and positions of employees within the firms are the major considerations of this category.

Physical Structure and Organization

Growth and Development

Each of the apparel manufacturers participating in this study was asked the place and year of establishment of his firm. All reported production had started in the state of Oregon and all but one indicated establishment in the Portland area. The oldest firm originated in 1880. The greatest number of firms originated between 1930-1939. The periods of firm establishment are as follows:

	<u>Number of Firms</u>
Periods of establishment:	
1880-1889	1
1890-1899	1
1900-1909	0
1910-1919	1
1920-1929	2
1930-1939	5
1940-1949	2
1950-1959	0
1960-1969	0

Executives of each firm were asked the principal reason for establishment in the Portland area. Ten respondents reported the original owners of the firms lived in the area, one stated lack of competition as the reason and one respondent did not give a reason for establishment in Portland.

Ownership

The respondents were questioned regarding ownership of firms. The responses revealed one firm was under private individual ownership; one firm was a partnership; three firms were open corporations; and seven firms (58 per cent) were closed corporations.

Golly¹ found in the Dallas Apparel Market study that firms preferred not to reveal the nature of their financial backing. Therefore, such questioning was not included in this investigation.

Size and Location

The size of the firms was determined by the number of employees within the firm as well as by the dollar whole-sale volume in terms of sales. Table 1 indicates the number of companies in each employee size category as used by the Census of Manufacturers² and the wholesale volume manufacturers indicated in the interview schedule.

Table 1 demonstrates that firms with the largest number of employees have the largest wholesale volume (in terms of sales). One-third of the firms employed over 500

¹Jeanne Marie Golly, "A Survey of the Present Status of the Dallas Women's Apparel Market" (unpublished Master's thesis, Michigan State University, 1966), p. 32.

²U.S. Bureau of Census, Census of Manufacturers, 1963, Industry Statistics, Part 1, Vol. 11 (Washington, D.C.: U.S. Government Printing Office, 1966).

Table 1. Size of firms according to the number of employees and the wholesale volume in terms of sales

Number of Employees	Wholesale Volume in Terms of Sales						T
	Under \$100, 000	\$100- 250, 000	\$250- 500, 000	\$500, 000- 1,000, 000	\$1-5, 000, 000	Over \$5, 000, 000	
0							0
1-4							0
5-9	1						1
10-19		1					1
20-49		1	2	1			4
50-99			1				1
100-249			1				1
250-499							0
500-999						1	1
1000-2499						2	2
2500 over						1	1
Total	1	2	4	1	0	4	12

persons and a wholesale volume over five million dollars yearly while one-fourth of the firms employed under 50 persons and their wholesale volume is somewhat under 250,000 dollars yearly. These figures show the apparel firms in Portland, range from very small to very large in these respects. The average Portland Apparel Market firm realized a yearly volume of approximately 500,000 dollars which is considered the average for the American dress manufacturing firms.³

To further explore the size and location of firms, respondents were asked about the number of production plants and the location of such plants. The responses indicated seven firms operated two production plants, one firm operated six plants and two operated eight plants. All firms operate at least one plant in the Portland area, one firm operated a second plant within the state of Oregon, four firms operated plants within other states including California, Georgia, Nebraska, North Carolina, Massachusetts, Pennsylvania, South Carolina, Tennessee and Washington. One firm reported operating a plant in San Juan and two firms have licensees in other countries.

When respondents were asked about the possibility of changing locations, two replied "yes" while ten answered in the negative. In those cases where there had been

³Phyllis Lee Levin, The Wheels of Fashion (New York: Doubleday and Company, Inc., 1965), p. 6.

consideration to change location, the reasons given were "better labor," and "less union control." Most firms in the Portland area seemed satisfied with the present conditions and location.

Executives were asked to rate considerations of importance in deciding upon a site for a textile or apparel firm. A scale from one to five was used to indicate degrees from "unimportant" (1) to "very important" (5). These results are summarized in Table 2.

The most important consideration of manufacturers in deciding upon plant site location as available labor. Inexpensive operations costs were also mentioned as a primary consideration whereas available advertising media were not significant to most firms, large or small. Available resources, tax structure, and transportation facilities were considered by both large and small firms to be relatively important. Smaller firms mentioned the retail and wholesale market as having considerable importance; larger firms tended to rate these as having little bearing on plant size location.

Factors Influencing Growth, Development, Size and Location

During the interview schedule it seemed apparent that respondents of smaller firms differed in opinion from respondents of larger firms on factors influencing growth, development, size and location. Larger firms favored geographic location as the most important single factor making the production of apparel profitable. Most of these firms

Table 2. Considerations influencing location of apparel firms rated unimportant, important and very important by respondents of large and smaller firms

A. Large firms--yearly wholesale volume more than \$500,000

Considerations	Unimportant		Important		Very Important
	1	2	3	4	5
Available advertising media	4		1		
Available labor					5
Available resources			2		3
Inexpensive operation costs		1	1		3
Transportation facilities			2	2	1
Retail market	3	1	1		
Wholesale market	2	1	2		
Tax structure		1	1	2	2

B. Smaller firms--yearly wholesale volume less than \$500,000

Considerations	Unimportant		Important		Very Important
	1	2	3	4	5
Available advertising media	3	1	3		
Available labor			1		6
Available resources	1		5	1	
Inexpensive operation costs			1		6
Transportation facilities	1		3	3	
Retail market		1	3		3
Wholesale market	1	1	2		3
Tax structure	1	1	4	1	1

are producers of sportswear or swimwear and felt that their home plant should be located in the Portland area or on the West coast for their image.

Because our West Coast is water mad, with almost more swimmers to the square mile than there are inhabitants, it was predestined that the bathing suit makers would be born and flourish there.⁴

Smaller firms in the Portland area produced a smaller variety of apparel items so they did not feel the importance to being located in or near the sportswear market. Their concern was placed in the area of production costs and an available retail market. Respondents of smaller manufacturers implied their growth and development were directly related to the management within the firm rather than any image which had been created by the regional firms.

Operation of Apparel Firms

Method of Production

All of the firms interviewed indicated their operations were of a type which classified them as manufacturers and two indicated they were also jobbers to some degree. The inside shop method of production is employed by all manufacturers and the two firms (those who indicated they were partial jobbers) utilize the jobber-contractor method of production for that segment of manufacturing.

As stated in the previous section of this chapter,

⁴Jessica Davies, Ready Made Miracle (New York: G. P. Putnam's Sons, 1967), p. 113.

five firms operated more than one production plant outside the Portland area. Of those firms, three produce a specific type of merchandise in each plant while the remaining firms do not. Three-fourths of the manufacturers operate their production plants on a twelve months' basis, others operate on a seasonal basis.

Source of Materials

The materials used and the transportation of these materials for apparel production are an important part of the operation costs of any firm. The apparel firms interviewed were asked where they obtain the materials for their products (see appendix). One firm indicated all materials are obtained within the state of Oregon, four firms revealed their materials came from the Pacific Northwest region. All remaining manufacturers in this sample (seven) obtain materials from other regions, states and/or countries. Respondents reporting the use of materials from other regions and states, mentioned the East and South as primary sources. This finding parallels Golly's⁵ research in Dallas and Mason's⁶ Michigan study, both report the East and South as important sources of materials for manufacturers in

⁵Golly, op. cit., p. 34.

⁶Mary Martell Mason, "A Survey of the Present Status of the Michigan Apparel Industry" (unpublished Master's thesis, Michigan State University, 1968), p. 29.

their studies. The East represented the New England states, New York and Pennsylvania. New York was mentioned most often. The South referred to the Southeastern states of Alabama and North Carolina. California was also mentioned as an important source in the West.

Two manufacturers specified they use imported European materials usually fabrics from Austria and France. Both firms are relatively small; one is a general sportswear manufacturer and the other is a custom blouse manufacturer.

Method of Distribution

Manufacturers were asked about the channels through which their merchandise is distributed for consumption. The methods of transportation utilized by firms for distribution of their merchandise to customers were also disclosed by respondents. The following chart summarizes the responses given by respondents:

Number of Mentions

Methods of distribution:

Transportation Facilities

Truck	11
Air	11
Railroad	9
Water	3
Consumer Pick-up	1

Distribution Channels

Factory to Retailer	7
Factory to Retailer and Wholesaler	3
Factory to Consumer	2
Factory to Wholesaler	0

The above responses indicate all but one firm utilized the truck and airline methods of transportation. In addition to these methods, three-fourths of the manufacturers used railroads to distribute their goods to outlets. Water methods of transportation were used only by large firms for shipping long distances to such places as Alaska and Hawaii. One manufacturer produced custom apparel for individual customers and therefore did not use any of the forms of transportation listed.

When respondents were asked about distribution channels, the majority of them answered that their firms send merchandise direct to retailers; however, three indicated they also send direct to retailers and wholesalers. Two manufacturers specified they sell their apparel products directly to the consumer. One firm operates its own retail outlet while the other sold from the manufacturing plant.

Personnel Within Apparel Firms

Executives of the firms participating in this study indicated the approximate number of employees in the following types of positions within their firms: executive officers, production managers, promotional directors, designers, skilled laborers and unskilled laborers.

Table 3 indicates the number of firms employing personnel in these various positions according to the employee size categories set up by the Bureau of Census.⁷

⁷Bureau of Census, op. cit.

Table 3. Number of firms employing men and women in types of positions within size categories of employees

Types of Positions	<u>Number of Firms^a</u>										
	<u>Size Categories of Employees^b</u>										
	0	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000-2499	2500-over
<u>Men:</u>											
Executive officers	1	7		4							
Production managers	3	6	2		1						
Promotional directors	7	4	1								
Designers	5	6		1							
Skilled laborers	4	2		2	1	1	1	1			
Unskilled laborers	11					1					
<u>Women:</u>											
Executive officers	6	6									
Production managers	8	3	1								
Promotional directors	11	1									
Designers	7	3	1	1							
Skilled laborers	1	1	2	2	1	1		1	2		1
Unskilled laborers	5	2	1		2		1	1			

^aTwelve selected firms.

^bSize categories established by the U.S. Bureau of Census.

It is demonstrated in Table 3, executive positions are held usually by men. However, smaller firms with one to four executive officers, employ as many women as men in these positions. Executive positions in larger firms are held by men in this sample. Only one-third of the manufacturers indicated women hold positions as production managers whereas three-fourths employ men in this position. Proportionately the size of the firm had little bearing on whether men or women hold positions as production managers.

Only one-half of the manufacturers interviewed reported they employ a person exclusively as a promotional director. Some firms stated this task was part of the duties of the executive officer. Of the firms employing promotional directors five employ men in this position and one employs women. Almost all firms indicated this position was held by fewer than five persons within a firm.

Table 3 indicates slightly more men than women held positions as designers, seven and five respectively. Three-fourths of the firms employed less than five designers; however, two firms reported employing more than five women and one firm more than five men.

Skilled laborers are usually employed as production workers, assembling and constructing the garments. All but one firm revealed they employ women as skilled laborers and seven firms employ men as skilled laborers. The largest firm employed as many as 500 men in skilled labor positions

and over 2500 women. Two firms employ up to 1000 women whereas no firm employs more than 500 men.

Three-fourths of the manufacturers interviewed employ unskilled laborers. These unskilled laborers are usually trained by their particular employer for a production task unique to that firm. Only one of the larger firms employs men in this position (up to 100). Seven firms employ women as unskilled laborers.

When manufacturers in the sample were asked about union affiliation, the majority of firms indicated their employees had no affiliation. Of the four firms indicating union affiliation, workers of three are members in the International Ladies' Garment Workers' Union. The general attitude of manufacturers toward unionization was negative and several smaller firms reported strong resentment toward unions, considering them a threat to their existence.

With the advances in science and technology, the apparel industry has placed stress upon education. To discover how this emphasis has affected persons employed in the Portland Apparel Market, executives and personnel managers were asked what educational levels they require of their employees. Table 4 summarizes these responses.

The required amount of education of employees increases as the skill and status of the position rises in the Portland Apparel Market. Table 4 indicates the majority of firms did not consider a high school diploma necessary

for an unskilled or skilled position. Several executives mentioned that these positions required individuals with patience, speed and accuracy and felt that a high school diploma, although a help, was not necessary. No employer considered a college degree as having any bearing on these positions.

Table 4. Number of firms requiring specific minimum educational levels for employees in types of positions

Types of Positions	Number of Firms			
	<u>Educational Levels</u>			
	Below High School	High School Diploma	College Degree	Graduate School
Executive officers	2	2	8	0
Production managers	2	8	2	0
Promotional directors	3	6	3	0
Designers	3	8	1	0
Skilled laborers	7	5	0	0
Unskilled laborers	11	1	0	0

Most executives agreed that a high school education was a necessity for employees in such managerial positions as designers, promotional directors and production managers. Some firms required a college degree for these positions while others thought it as desirable but not necessary.

Two-thirds of the respondents considered a college

degree necessary for any top executive office with an apparel manufacturing firm. They were of the opinion that a college education prepared employees for the responsibility, initiative and organizational qualities necessary for those positions.

Of the 12 respondents, none mentioned graduate school as a necessity for any position within their firms. Respondents indicated that there is a definite trend in the direction of more education for all employee positions.

Respondents indicated their training program within the firm was often more useful to employees than more formal educational achievement. All larger firms have regular training programs for all levels of employment. Some hold formal classes familiarizing future employees with firm procedures as well as specific positions to be held. Other firms train their employees by the "on-the-job" method. The new employees work with experienced employees to learn the requirements of the specific position. All smaller firms train new personnel by the latter method.

Summary

Most of the firms participating in this study were established during the period of 1930-1939. The majority of firms are owned by closed corporations; but since questions concerning financial backing were not included in the interview, methods of financing were not revealed.

One-third of the firms in the sample employ 20-49

persons while another third employ over 500 persons. The average wholesale volume of these firms is \$500,000 per year.

All firms operate at least one production plant in the Portland area and a few own subsidiary plants in other parts of the United States. These firms use the "inside shop" method of production and usually operate on a 12 month basis.

Trucking, railroad and air transportation are used most frequently to distribute merchandise produced by Portland manufacturers to retailers for distribution to consumers. Department stores and specialty shops are the type of retail outlets utilized by most firms.

It was found that men usually hold executive positions within the apparel firms while an equal number of men and women are employed as designers. Women usually hold more positions as skilled and unskilled laborers. The more responsibility connected with specific positions, the more education is required by manufacturers to attain these positions in the Portland Apparel Market.

CHAPTER IV

APPAREL PRODUCTION

An outstanding feature in the United States is the specialization of clothing firms in certain types of goods such as overcoats, suits, dresses, sportswear and underclothes.¹ Portland apparel manufacturers typically produce a variety of apparel items for consumption throughout the United States.

Chapter IV describes first the functions of the designers creating apparel items in the Portland apparel firms, the types of designs produced and the collections of individual designers. Secondly, apparel items are reported according to styles, age ranges, sex, price categories and seasonal lines.

Designers

The designer is still the foundation of any garment manufacturing company, whether he is the employer or an employee. The designer's responsibility includes keeping abreast of the changing tastes and demands of the American

¹International Labour Office, Tripartite Technical Meeting for the Clothing Industry, Problems Arising from Fluctuations of Employment in the Clothing Industry (Geneva, 1964), p. 107.

public as well as bringing out styles which will represent current and coming fashions.²

Functions of Designers

The designing of apparel items was considered as a separate department by five of the twelve firms interviewed. Of those five, two firms employed designers located in New York while the remaining three hired designers within the Portland area. Seven firms, all smaller ones, indicated the actual designing of garment collections was a function of holders of managerial positions or in some cases contracted out.

Respondents were asked what name they used in their designs. The majority mentioned the firm name was used most often on the labels of the apparel items. Three respondents indicated they design under their own name, which in one case was also the same name as the firm.

Further investigation showed that one-half of the designers interviewed generally design for department stores. Eleven of the 12 respondents also mentioned specialty shops as a prime retail outlet for their creations. Only one firm indicated mail order houses and chain stores as considerations when designing their collections. One designer did not aim for any specific retail outlet but did custom designs

²Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York: John Wiley and Sons, Inc., 1965), p. 68.

for individuals.

Types of Designs

The respondents were asked to classify the types of apparel they design into several categories; three-fourths mentioned "sportswear" as the descriptive term for their designs while one firm mentioned "infants-wear" and two mentioned "coats and suits." One designer indicated his prime concern was to design "lingerie," while another respondent considered "uniforms" as the most important item in her collection. While a few mentioned "daytime wear" and "evening wear" as a category, they also used "sportswear" as an appropriate classification.

More specifically, respondents mentioned a variety of items they considered as their specialty. Two designers indicated they were known for their tailored-classic styles; other designers mentioned such items as custom shirts, fishing vests, sweaters, uniforms and infant-giftwear. All of these apparel items seem to suggest that a variety of sportswear of all types plays a leading role in the Portland Apparel Market.

Collections

One-half of the designers present between two and five collections yearly, while another one-third create only one collection per year. One of the larger firms employs enough designers to create up to 200 collections per year.

When respondents were asked the percentage of their collection which represented new styles each year, the responses were divided into distinct groups. About one-half of the designers indicated that less than five per cent of their collections represented new styles. The remainder estimated that over 20 per cent of their annual collection represented new styles.

Designers of larger firms mentioned that buyers are more receptive to the new fashions they create each year because the American public is fashion conscious and want "newness." One designer felt that new fashions were a "must" in sportswear and sell better on the market than the classics.

The designers of medium to smaller size firms revealed their buyers were less receptive to new fashions. Nearly all of these firms attributed this to their reputation for a particular design or style which has consistently been a good seller. These designers also indicated they would prefer not to change their entire collection each year.

Again about one-half of the designers disclosed their designs were copied on the mass market but this could not be prevented. Designers felt those designs which are not copied are too expensive to make duplication worthwhile or too complicated because of custom construction techniques.

Five firms employ designers to plan colors and patterns for woven or knit fabrics. These fabrics are used within the firms in the production of apparel items as well

as sold by the bolt to retail outlets for public consumption. All five firms mentioned that over ten per cent of their total designing within the design departments was directed to fabric designs.

Apparel Items

The ultimate goal of those persons in the apparel industry is to have the consumer buy their merchandise. To inspire the consumer, manufacturers must not only accurately predict the coming fashions, but also make available variety in types of apparel produced, price ranges, styles, seasonal lines, and age ranges.

Types of Apparel

To discover the types of apparel produced in the Portland Apparel Market, responses from individual firms have been summarized in Table 5. There are six main categories for types of apparel: coats, suits, dresses, separates (jackets, skirts), blouses or shirts, and underclothes. Respondents were also asked what age groups they aim for in their presentation. Production of apparel items for males, females and children is summarized in Table 6.

Table 5 designates the types of apparel items produced by each of the 12 individual firms for males, females and children. One firm produced only childrens' and infants' wear while two firms manufactured mens' wear and four firms were exclusively producers of womens' wear. The remaining

Table 5. Types of apparel produced for males,^a females^b and children^c by selected individual firms

Firms	Types of Apparel Items						
	<u>Suits</u>		<u>Separates</u>		Blouses or		Under-
	Coats	1-Piece	2-Piece	Dresses	Jackets	Skirts	Clothes
I				C			C
II							M
III	M				M		
IV	F						
V	F	F	F				
VI				F			F
VII	F	F	F	F	F	F	F
VIII	FC				MFC	FC	MFC
IX	F	F	F	F	MFC	F	MF
X		C	C		FC	FC	MFC
XI	F	MFC	FC	F	MFC	FC	MFC
XII		F	F	F	FC	FC	MFC

^aMales = M

^bFemales = F

^cChildren = C

Table 6. Production of male^a and female^b apparel within age groups by selected individual firms

Firms	Age Groups						Over 50
	Under 5	5-12	13-17	18-21	22-30	31-50	
I	MF						
II					M	M	M
III		M			M	M	
IV				F	F	F	F
V						F	
VI				F	F	F	
VII			F	F	F	F	
VIII		M	M	F	F	F	
IX	MF	MF	MF	MF	MF		
X	M	MF	MF	MF	MF		
XI	MF	MF	MF	MF	MF	MF	
XII	MF	MF	MF	MF	MF	MF	

^aMales = M

^bFemales = F

five firms produced a substantial amount of apparel for men, women and children.

The firm producing for children and infants only was mainly concerned with the manufacturing of dresses and underwear. The two mens' wear firms were both producing the majority of their items, usually coats, shirts and jackets.

Of the firms producing women's apparel exclusively, two firms were coat and suit firms, another manufactured dresses and blouses, and the fourth produced almost all types of women's apparel.

Table 5 reveals that coats were produced by seven of the firms in this study, four of which manufactured coats only for women. Six firms manufactured suits both two and three piece, only for women. Dresses and skirts for women and children are produced by one-half of the participating firms. Jackets are produced by seven firms of which four manufactured for men and children and six exclusively for women.

Blouses and shirts were made by the majority of firms in the Portland Apparel Market. One firm did custom designed shirts for men while another manufactured blouses for females. Underclothes were designed, manufactured and sold by two firms, one of which produced only for children and the other for men, women and children.

Several firms mentioned clothing items produced in

addition to those included in Table 5. Two firms mentioned swimwear as an extremely important item in their seasonal lines for both spring and fall. Another infants-wear firm included diapers and bibs as important to their existence as an apparel firm.

Again an examination of Table 5 denotes the majority of firms in the Portland Apparel Market produce more apparel items for women than they do for either men or children. There are twice as many apparel firms producing only for women as those producing for men. Those firms manufacturing apparel for males, females and children, also make more apparel for the female sex than for males and children.

Age Groups

Portland manufacturers indicated their apparel items were intended for persons ranging in age from children under five years to adults over 50 years. The majority of apparel items are produced for the age groups between 18 and 50 years of age. Only two firms design specifically for persons over 50 years of age although most firms indicated their garments are worn by persons of all ages.

Table 6 indicates the production of apparel within the specified age groups by each individual firm. Those firms producing for children, design apparel for both males and females under 12 years old. Two firms produce for male children only.

Those firms producing for males only make the

majority of their apparel for the 22-30 and 31-50 age brackets. Firms producing for women aim at the age groups between 18 and 50.

Five firms manufacturing for men, women and children include all age groups up to 50 years in their production as seen in Table 6.

Price Ranges

Manufacturers were asked to classify their merchandise into retail and wholesale price categories as follows: Under \$5; \$5-15; \$15-25; \$25-50; and over \$50. Two-thirds of the firms indicated the majority of their apparel items wholesale in the \$5-15 price category. Two firms indicated the wholesale price of their merchandise is under \$5 whereas the remaining two firms wholesale their merchandise at \$50 or more per item.

One-half of the firms interviewed mention the \$15-25 price category as the average retail price range for their apparel products. Another one-third of the respondents indicated their merchandise retailed in the \$25-50 and over \$50 brackets.

From the above information, it can be concluded that apparel produced in the Portland Apparel Market is usually within a moderate price range.

Seasonal Showings

Showings are usually held three or four months in

advance of the major seasons to prospective buyers of seasonal lines. Each season has a special emphasis for showings: Spring and Summer for the resort line, Fall for the opening of school, and Winter for the Christmas season. The number of shows held by the individual firms varies according to the size of the firms and the type of apparel items produced. Portland firms indicated two showings per year are the average number; however, one firm has as many as 12 showings yearly. None of the firms participating in this study holds a special showing for the press.

Not all firms use showings. Two firms reported merchandise is sold through representatives and they do not have showings as such.

When the Portland apparel manufacturers were asked to comment on the most important season for which they produce, several firms stated Spring. The reason for this season's importance was their production of swimwear and resort wear. Other firms mentioned fall and winter as more important because they produce skiwear, winter coats and jackets. There is no particular season of the year which the majority of firms consider as the most important to the Portland Apparel Market. Most firms produce the majority of their lines year around.

Summary

About one-half of the firms in the Portland Apparel Market have a separate design department within their

establishment and the majority of firms hire local designers. Most designs are labeled under the name of the firm which employs the designer rather than the name of individual designers.

Most of the apparel produced in the Portland area is intended for department stores and specialty shops.

"Sportswear" was the descriptive term under which most designers classified their creations. Apparel items are introduced through two showings per year. Two to five collections are presented at each showing as the average for the Portland area.

The majority of firms produce sportswear apparel for men, women and children although more apparel is produced for women than for men or children. Apparel is usually produced for persons in age brackets between 18 and 50 years at moderate prices.

CHAPTER V

MARKETING OF APPAREL ITEMS

One of the characteristics of the Portland apparel industry which makes it unique is the wide variety in the number, size and type of apparel produced by the firms in this area. The marketing of apparel items also varies, consistently among firms making up this unparalleled market. This chapter will examine the marketing of apparel produced by these firms including promotion, distribution and overall extent of the market.

Promotion and Presentation

The prime concern of the promotional director of an apparel firm is to utilize those forms of promotional tactics which will make the consumer buy the products he represents. To discover the what, who, how and why of promotion and presentation of apparel items in the Portland Apparel Market, one section of the questionnaire (Appendix B) was directed to promotional directors.

Respondents were asked at what age level they primarily aim their promotional tactics. Responses indicated the majority of firms direct promotion to "young adults" and "middle age adults." The following summary presents the different types of audiences mentioned by promotional directors:

Number of Mentions

Types of audience:

Children	2
Pre-teen	3
Teenage	5
Young Adults	8
Middle Age Adults	7
Elderly Adults	1

One firm mentioned the majority of their advertising or promotion is aimed at distributors, rather than consumers. Although this firm does not advertise nationally, the responsibility for local advertising is assumed by the firm and distributors jointly.

There are many forms of promotion which may be utilized by individual firms in the advertisement of their products. Respondents to this section of the questionnaire (see Appendix B) specified the forms of promotion applied to the marketing of apparel by Portland firms. More firms use the "direct by mail" method than any other. In this approach, firms send pamphlets, posters and reports to retail distributors for dispersion to consumers. Several firms mail advertisements direct to the consumer.

A sizable number of firms promote their products through media such as daily newspapers, consumer magazines, business publications, catalogs, exhibits and window displays (usually show-rooms). Television was utilized by one-fourth

of the sample whereas none advertised on network radio.

The forms of promotion mentioned by participating firms are:

	<u>Number of Mentions</u>
Forms of promotion:	
Direct by Mail	7
Daily Newspapers	5
Business Publications	5
Exhibits	5
Consumer Magazines	4
Catalogs	4
Window Display	4
Television	3
Telephone Directory	2
Weekly Newspapers	1
Industrial Films	1
Electric Signs	1
Outdoor Signs	0
Network Radio	0

One-third of the firms in the Portland Apparel Market advertise in national magazines. The following chart indicates the number of firms advertising regularly in specific national magazines:

Number of Mentions

Magazines used for advertising:

<u>Seventeen</u>	3
<u>Glamour</u>	3
<u>Mademoiselle</u>	3
<u>Vogue</u>	1
<u>Harper's Bazaar</u>	1
<u>New Yorker</u>	1
<u>Life</u>	1
<u>Esquire</u>	1
<u>Sports Illustrated</u>	1
<u>Field and Stream</u>	1
<u>Playboy</u>	1
<u>Ebony</u>	0
<u>Ingenue</u>	0
<u>Town and Country</u>	0

Seventeen, Glamour and Mademoiselle are used most frequently for advertisement by firms in this sample.

The majority of firms in the Portland Apparel Market do not utilize the services of professional advertising agencies. Only one firm indicated they advertise in conjunction with another firm. In this case, the apparel firm combined advertisement with a textile mill.

For use in fashion showings, two firms hire models. These trained models are obtained locally on a regular basis by both firms.

Promotional directors were asked to comment on the form of advertisement which they see as most beneficial to the apparel industry. One-half of the respondents mentioned television as most important because of "better coverage" and "consumer influence." Television was also considered as the most noteworthy trend for the future in apparel advertising and was predicted to become more important as it becomes cheaper.

Other firms mentioned "newspapers" and "magazines" as important to the promotion of apparel products. In normal circumstances, advertisements serve as a vehicle to introduce new fashions, either in fashion magazines or in the general press. It has been found that apparel manufacturers usually advertise their products by these media on a seasonal basis.¹ Portland firms also adhere to this principle.

For a time, the Portland Apparel Market supported a trade association for the purpose of sponsoring seasonal market events held coincidentally with the opening of lines in California houses. This activity was discontinued in 1952 because firms felt at that time their area lacked the breadth and depth of lines to attract many retailers from outside the western states.

Today firms in the Portland Apparel Market exhibit

¹International Labour Office, Tripartite Technical Meeting for the Clothing Industry, Problems Arising from Fluctuations of Employment in the Clothing Industry (Geneva, 1964), p. 107.

their goods either through private seasonal showings or they utilize road salesmen. These private showings are held at the convenience of each individual firm, either in their own showroom or at a hotel.

Market Distribution

All but one firm market their apparel products to areas outside the immediate Portland metropolitan area. Four firms distribute their apparel products within the "Pacific Northwest Region," including the states of Washington, Oregon and northern California. All other firms exhibit and market their merchandise throughout the United States. Two firms also distribute products to foreign countries.

Information was gathered from the firms participating in this study about the distribution of merchandise to retail outlets (see Appendix B). Responses to items 20, 21 and 22 of Part I on the questionnaire indicated seven firms transport merchandise directly to retail outlets, three send to both retailers and wholesalers and two distribute directly from factory to consumer. The types of retail outlets used by firms either directly or through wholesale distribution are as follows:

Number of Mentions

Types of retail outlets:

Specialty Shops	11
Department Stores	10
Chain Stores	5
Discount Houses	4
Variety Stores	2
Mail Order Houses	1
Other Types	1
None	1

Of the 12 participating firms, ten distribute products to more than one retailer in any specific locality. Two limit their distribution through the sales of franchises to one outlet in an individual trading center.

Two firms own their own retail outlets. One firm owns two outlets in shopping centers within the Portland area while the other firm operates a retail outlet at the factory.

Extent of the Market

To gain an overall understanding of the Portland Apparel Market, it was the intent of this study to discover the extent of the market as to the distribution practices and annual volume of sales. The distribution procedures of Portland firms were discussed in the preceding section of this chapter. Therefore, this section will concentrate

on the size and extent of the Portland Apparel Market in terms of the dollar amount of sales.

It has been reported by the U.S. Bureau of the Census, the total value added by manufacturers of apparel in the Portland area was \$25,031,000 in 1963.² This amount indicates the total dollar wholesale value in terms of sales for the Portland area which is divided into four counties: Clackamas, Multnomah and Washington counties in Oregon; and Clark county in the state of Washington (see Figure 1). Multnomah County, encompassing Portland proper, contributed about 64 per cent of the total 25 million dollar volume in 1963.³

All manufacturers were willing to approximate their yearly wholesale volume, in terms of sales, for the year 1967. More firms have a wholesale volume in either the "\$250-500,000" range or the "\$5,000,000 or over" range than any of the other ranges as shown in Table 1. Three of the firms in the "\$5,000,000 or over" range revealed their wholesale volume was a great deal over the five million dollar mark. These firms operated other production plants in other states in addition to the Portland area.

Annually apparel firms estimate expected sales for

²U.S. Bureau of the Census, Census of Manufacturers, 1963, Industry Statistics, Vol. II, Part I (Washington, D.C.: U.S. Government Printing Office, 1966), p. 38-10.

³Ibid., p. 38-10.

the following year. Firms indicated they base these estimates on the previous years' sales records. The majority of firms indicated they can calculate expected sales for any given year within 75 to 95 per cent accuracy. Two firms which use mathematical projections in addition to their previous years' sales record claim to calculate expected sales within 95 to 100 per cent accuracy.

Two smaller firms revealed their projections for expected sales for a given year are usually less than 25 per cent accurate. These firms operated much of the year on special orders and reorders, they do not keep any sizable inventory and therefore find it difficult to estimate expected sales. Smaller firms indicated a gain in wholesale volume each year but did not indicate the amount.

To discover the increase in production and growth of the apparel market, respondents were asked about the percentage of sales volume increase over the past five years in their firms. The following chart summarizes these responses. The majority of firms have increased their volume, in terms of sales, 5-10 per cent over the past five years.

Percentage of increase in sales volume 1963-1968:	<u>Number of Mentions</u>
Under 5	3
5-10	5
10-25	2
25-50	1
Over 50	1

The designer, the manufacturer and the retailer must aim to predetermine what the public will accept; they must do so efficiently and sufficiently in advance to satisfy the demand when it comes. More than that they need to foresee the duration and extent of the demand so there will not be an oversupply of goods on hand when the fashion changes.⁴

Portland apparel firms revealed they were able to keep up with the demand for their products; however, about one-half of the firms experience surplus in certain lines periodically. Three firms dispose of surplus items through special seasonal sales while others reduce the prices of their merchandise and sell it at factory outlets or to wholesalers.

Summary

Promotion of apparel items in the Portland Apparel Market is most often directed toward "young adults" and "middle age adults" through mail advertisements, daily newspapers, business publications, exhibits and consumer magazines.

Seventeen, Glamour and Mademoiselle are the national fashion magazines utilized most frequently for advertising. Promotional directors considered television as the most important trend for the future in apparel promotion.

The marketing of apparel products produced in the

⁴Pauline Arnold and Percival White, Clothes and Cloth (New York: Holiday House, 1961), p. 158.

Portland Apparel Market takes place throughout the United States as well as the Pacific Northwest. Department stores and specialty shops are the types of retail outlets utilized for distribution by most manufacturers.

One-third of the firms have a wholesale volume of \$250-500,000 while another one-third have a volume over \$5,000,000. The majority of firms are able to calculate expected sales for any given year with a 75-95 per cent accuracy on the basis of the previous years' sales record. About one-half of the firms have increased their volume (wholesale) 5-10 per cent in the years 1963-1968.

CHAPTER VI

ANALYSIS OF THE MARKET

There have been some notable changes in the apparel industry over the last decade: the rise of giant concerns; emergence of nationally advertised apparel brands; more diversification of products; decentralization of facilities; and increased automation.¹ Many of these changes have been primary factors in the growth and expansion of the Portland Apparel Market. Importance of expansion of apparel production in Oregon was brought out recently by Governor McCall of Oregon.² He recognized the apparel industry as being one of the developing industries involved in Oregon's effort to diversify from the lumber and paper industry.

Information was obtained regarding the present trends and possible future developments of this regional market and efforts were made to discover its importance and significance locally, regionally and nationally as part of the United States apparel industry.

¹Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York: John Wiley and Sons, Inc., 1965), p. 66.

²Stuart E. Jones, "Oregon's Many Faces," The National Geographic Magazine, Vol. 135, No. 1 (January, 1969), p. 81.

Present Trends and Future Developments

Firms participating in this study supplied information concerning the recent trends and potential growth of the Portland Market as well as comments predictive of the future of the market. This knowledge is of importance in determining some general factors which would be influential in the growth or decline of the apparel industry in the Portland area.

Growth and Expansion

To determine the recent growth of the Portland Apparel Market, manufacturers were asked about expansion which has taken place since 1960 (see Appendix B). Responses revealed that ten firms have expanded since 1960. Further questioning disclosed four firms have expanded in facilities or plant, personnel and diversification of products; one firm has only enlarged facilities or plant; three firms have expanded the number of their products; one firm enlarged facilities and increased the number of employees; and one firm has diversified products and increased the number of their personnel.

Firms were also asked their plans for future expansion in the areas of plant or facilities, location, employment size and diversification of products. Eight respondents revealed expansion plans to take place before 1973. Three firms plan to enlarge the present physical facilities while four firms have tentative plans to expand to new

locations. One firm mentioned California as a possibility for location of new plants. The availability of labor is a prime reason for expansion to semi rural areas. Relocation would take advantage of a fresh labor supply and the close surveillance of the labor union.

Diversification in the types of products produced is another type of expansion mentioned by seven firms included for study. These firms plan to diversify their products so as to capture the business of customers of all ages. Firms engaged in a small range of specialized products mentioned they are particularly vulnerable to changes of fashion or introduction of new products such as plastic and paper apparel products. Therefore, diversification was felt as a necessity for growth in production.

Most firms did not anticipate any significant change in the number of personnel hired in the next five years. Improved professional management, more up-to-date production methods and increased automation will compensate for the expected increase in production and the status quo of employees. Firms mentioned it was difficult to find competent skilled and unskilled labor. Firms planning expansion to new locations will hire personnel within that area for these new facilities.

Predictions for the Future

Garment making is usually city located, fashion directed, seasonal, fiercely competitive, and fraught with

financial risks.³ These trends, however, point out changes to take place in the industry which were reflected by Portland manufacturers when asked, "What, in your opinion, is the future of the Pacific Northwest Apparel Market?" (see Appendix B). This question was directed toward executives, designers and promotional directors in each firm. Their comments are summarized in Table 7.

Table 7. Number of responses of executives, designers and promotional directors to the question, "What, in your opinion, is the future of the Pacific Northwest Apparel Market?"

Range of Responses	<u>Number of Mentions</u>			T
	Executives N	Designers N	P. Directors N	
Excellent	2	1	1	4
Good				
Sportswear Only	3	1	1	5
All Apparel	3	2	3	8
Moderate	2	-	2	4
Fair	1	1	-	2
Limited	1	2	-	3

The above responses imply that the majority of executives, designers and promotional directors consider the

³Alpha Latzke and Helen P. Hostetter, The Wide World of Clothing (New York: The Ronald Press Company, 1968), p. 222.

future of the Pacific Northwest including Portland as an apparel market, good for all apparel manufacturing. Executives felt their market had a good to excellent future while promotional directors indicated a good to moderate future. Reasons given for the more than optimistic outlook by manufacturers were: "population increase," "increase of other industries in the Portland area," "image as a sportswear leader," "increase in leisure time for consumers resulting in a need for more casual wear," and "the Pacific Northwest as a natural trade center." Without a doubt, the production of apparel in the Pacific Northwest will continue to grow and be of significance to the national apparel industry.

Significance and Importance of the Market

Geographic location was mentioned as the most important single factor making production of apparel profitable in the Portland area. The West coast way of life is recognized as involved with planes and cars, and getting about quickly.⁴ The casual clothes produced there reflect this marvelous sense of freedom and support the recreational opportunities presented by the mountains and the water. In addition to the geographic location, the availability of trained personnel and the retail consumers' market make Portland important as a local apparel market.

⁴Jessica Davies, Ready-Made Miracle (New York: G. P. Putnam's Sons, 1967), p. 122.

To identify those factors which make the Portland Apparel Market distinctive as a regional market, manufacturers were asked questions about the predominant design types and styles produced in the Portland area (see Appendix B). Seven respondents stated "sportswear" or "casual wear" as the most important type of apparel manufactured in Portland. As a regional market, four firms did not feel one style was predominant. Those respondents pointed out that "sportswear" is an all encompassing term which today covers everything from overcoats to bathing suits. It was their opinion that "active sportswear" such as "swimwear," "pants" and "ski wear" were more appropriate terms to describe the products which have added to the prestige of the market.

To further disclose the factors which influence the predominant production of sportswear, the following chart summarizes the opinions expressed by executives interviewed in this study:

	<u>Number of Mentions</u>
Factors which influence designs:	
Climate and Terrain	4
National Buying Trends	3
Local Consumer Market	2
Available Resources	1
No Opinion	1

The climate and terrain of the Pacific Northwest create an atmosphere fitting for sports clothes and are

considered dominant as an influence on designs produced there.

Almost equally significant are the national buying trends of consumers which make the Portland Apparel Market important as a contributor to the national apparel industry. More and more, consumers are buying clothes styled for an active physical life. Today's housewives wear pants for a do-it-yourself wall paper project; pants may also be worn when entertaining at night. Informal gatherings are taking the place of grand occasions.⁵

To further demonstrate the rising importance of sportswear and casual clothes, at the expense of more traditional garments, Table 8 shows the shift in apparel production from 1939 to 1965.⁶

The per capita units of coats and suits for men manufactured in 1965 were about two-thirds of the production in 1939. The volume of skirts for women and girls increased nine times over that period; blouse volume increased six times; and sweater volume increased about three times, indicating a significant rise in sportswear production. The number of dresses, coats and suits was less than half the

⁵Eve Merriam, Figleaf (Philadelphia: J. B. Lippincott Company, 1960), p. 25.

⁶"United States Consumer Apparel Expenditure, 1935-39 to 1965," World Wool Digest, XVII, No. 25 (December 8, 1966), p. 207.

Table 8. Men's, women's, misses' and juniors' wear produced by United States apparel firms during 1939 and 1965 in total units and per capita units

Category	Total (million units)	Per Capita (units)	Total (million units)	Per Capita (units)
Men's Wear:				
Separate trousers	40.3	0.89	139.0	2.42
Suits	24.7	0.55	22.4	0.39
Sweaters	22.1	0.46	40.2	0.70
Overcoats	5.6	0.13	04.4	0.08
Sport coats	1.0	0.02	12.5	0.22
Women's, Misses', Juniors' Wear:				
Dresses	194.4	3.88	183.7	2.59
Blouses	34.6	0.69	202.4	2.85
Skirts	13.0	0.26	118.9	1.67
Sweaters	28.5	0.52	89.7	1.26
Coats	17.4	0.35	25.5	0.36
Suits	4.2	0.08	11.7	0.17

quantity in 1965 as in 1939.⁷ Again these figures indicated consumers are purchasing more casual apparel for all occasions.

Manufacturers were asked to comment on what they thought the Portland Apparel Market contributed to the United States apparel industry. The majority of respondents stated, "new designs in sportswear" and "quality" made the Portland Apparel Market an important asset to the total apparel industry of the United States. Although most manufacturers agreed that Portland had not yet become a major apparel market such as Los Angeles or Dallas, it was their opinion that the Portland Apparel Market was important as a regional market and the growth potential was "unlimited."

Summary

The majority of firms participating in this study have expanded in facilities or plants, personnel and production volume since 1960. Two-thirds of these firms also indicated plans for future expansion before 1973.

Responses of executives, designers and promotional directors to the question, "What, in your opinion, is the future of the Pacific Northwest Apparel Market?" indicated the majority consider it "good" for all types of apparel production. Geographic location was found to be the most significant factor making the production of apparel profitable

⁷Ibid., p. 211.

in the Portland area.

The Portland Apparel Market is considered by firms within, to be distinctive locally, regionally and nationally for its sportswear contribution. Figures support a significant rise in sportswear production throughout the United States since 1939 (see Table 8). Because of this growth, Portland firms consider their production of sportswear a noteworthy part of the national apparel industry.

CHAPTER VII

SUMMARY AND RECOMMENDATIONS

Summary

The apparel industry is becoming an important part of the Oregon economy and more specifically, the Portland area is gaining significance as a regional market. Much of the success of the Portland area as an apparel market can be attributed to its geographic location. Because of the year-around recreational facilities and relatively mild climate, sportswear manufacturers are producing clothing at an increasing rate. The growing importance of the Northwest in the national apparel industry has prompted an investigation of the production of apparel in the Portland area.

This study is part of a larger departmental study on regional apparel markets presently in progress. Its purpose was to survey the production of apparel in Portland, examining the structure, organization and operation of apparel firms; production and distribution of apparel items; and promotion, marketing and extent of the market. Present trends and future predictions were analyzed to help determine the significance and importance of the Portland Apparel Market.

A broad exploration of the various aspects of apparel production in the Portland area was conducted by interviewing 12 executives, three designers, and seven promotional directors. A letter was sent to all apparel manufacturers in the Portland Apparel Market requesting their participation. Telephone calls were made to each firm asking for an interview, and twelve firms agreed to participate and granted appointments for interviews.

The data for investigation were gathered through factual questions pertaining to the present status of the Portland Apparel Market and were used to evaluate the potential growth and future development of the market.

To discover the significance, importance and possible future expansion, items allowing for free expression of respondents' future intentions, feelings, attitudes and preferences were used in the instrument. The questionnaire was segmented into five parts; three were directed toward executives, one to designers, and one was directed toward promotional directors.

Background information was obtained to describe the physical structure and growth of the firms including development, size and location of firm facilities. Most of the participating firms were established during the period 1930-1939. The principal reason given for establishment in the Portland area was the original owners had resided there.

The majority of firms are owned by closed corporations.

Since questions concerning financial backing were not included in this interview schedule, this information was not elicited.

Table 1 indicates manufacturing firms vary in size from very small to very large both in number and in yearly wholesale volume in terms of sales. One-third of the participating firms employ 20-49 persons while another third employ over 500 persons.

More than one-half of the manufacturers indicated operation of only one production plant while larger firms operate up to eight plants. The five firms operating more than one production plant outside the Portland area also operate at least one plant within the Portland area. Of those firms owning other subsidiary plants, the majority of such plants were in other states usually in the Northeast or Southeast states. Most respondents had no desire to change location. Available labor and inexpensive operation costs were mentioned most often as the most important considerations influencing the location of apparel firms.

All 12 firms are manufacturers and use the "inside shop" method of production. Two firms are jobbers in part. Five firms operate more than one production plant outside Portland, three of which produce a specific type of merchandise in each plant. The majority of manufacturers operate on a 12 month basis.

The East and the South were mentioned by 58 per cent of the manufacturers as the main source of materials utilized

in production. Other firms reported they obtain their materials from the Pacific Northwest Region or the immediate Portland area. Two firms import materials from foreign countries.

Trucking, railroad and air transportation are employed most frequently to distribute merchandise produced by Portland manufacturers. Water methods of transportation are used by three of the larger firms.

The personnel within any firm determine its success whether at the managerial level or the production level. Within the Portland Apparel Market, men usually hold executive positions within the apparel firms including top management positions, production management and promotion. An almost equal number of men and women hold positions as designers. Women hold more positions as skilled and unskilled workers in the actual production of apparel garments than do men. The more responsibility connected with a position held by an employee, the more education is necessary to attain that position with the firms in this sample. A college degree was the most desirable for an executive position while production managers, promotional directors and designers were usually required to have completed high school. A high school diploma was not considered necessary for positions with less responsibility such as skilled and unskilled laborers.

Most firms are not affiliated with any union in the

Portland Apparel Market. Those who are unionized are members of the International Ladies' Garment Workers' Union.

While the majority of firms in the Portland Apparel Market do not separate designing into specific departments, five firms have a design department. Designing is usually done by local designers or the firm owners. However, in a few cases, designers are hired by the firms to work in New York.

Most designers design under the firm name which in some cases is the name of the designer himself. Most designers felt their designs were affected by the price range desired by the individual firm for which they were employed.

"Sportswear" was the descriptive term under which most designers classified their designs. Seasonal showings are usually given three or four months in advance of the prospective season by manufacturers in the Portland Apparel Market. The majority of designers work toward two showings per year with two to five collections shown at each. No one collection was considered as more important by the majority of firms.

One-half of the designers reported less than five per cent of their collections as being new styles each year while another group revealed over 20 per cent were new styles. Buyers of apparel are more receptive to new styles from larger firms than smaller ones.

Over ten per cent of all designing is directed

toward designs for woven and knit fabrics. These fabrics are used in the manufacturing of apparel within five firms as well as for sale outside the firms.

Firms in the Portland Apparel Market pride themselves on producing a wide range of apparel items for men, women and children in all age brackets. One firm produces dresses, coats, layettes, diapers and miscellaneous items for children only while two firms were producers of coats, jackets and shirts exclusively for men. A variety of women's, misses' and juniors' wear was produced by four participating firms.

Coats, dresses, separates (jackets and skirts), suits, blouses and shirts, underwear, swimwear and rainwear were reported as the major apparel items produced for persons up to and over 50 years of age. The majority of firms manufacture apparel for women 18 to 50 years of age; however, the apparel items are worn by women of all ages.

The majority of apparel items wholesale at \$5-15 per item and retail at \$15-25 per item. One-third of the firms produce merchandise to retail in the \$25-50 and over \$50 price ranges.

The promotional tactics utilized in the marketing of apparel items were designated by promotional directors. The "direct by mail" method, including pamphlets, reports, posters and flyers were sent by the majority of firms for promotion of their apparel items. Newspapers, consumer

exhibits, business publications were used to some extent for promotion and usually directed to "young adults" and "middle age adults."

Seventeen, Glamour and Mademoiselle are national fashion magazines used regularly for advertisement. Only one firm in the sample advertises in conjunction with other firms.

Television was considered by Portland manufacturers as the most important trend for the future in apparel advertising because of "better coverage" and "consumer influence." Promotional directors indicated the amount of television advertising would increase as it becomes cheaper.

A local trade association, sponsored by Portland apparel firms, was in existence until 1952, for the purpose of sponsoring seasonal market events. This activity was discontinued because firms felt at that time the Portland Apparel Market was not extensive enough to attract a sizable number of retailers from outside the Western states. Today these firms exhibit their merchandise locally through private showings.

A majority of firms exhibit and market merchandise throughout the United States. Two firms also market products to foreign countries. The majority of the firms channel apparel products directly to retailers for distribution to consumers. Department stores and specialty shops are the main types of retail outlets distributing the products of the Portland Apparel Market.

Census data were used to establish the overall extent of the Portland Apparel Market. Manufacturers added a total wholesale value of \$25,031,000 in 1963 to the national apparel industry. Multnomah County, surrounding Portland proper, contributed 64 per cent of this volume. The majority of firms have an annual wholesale volume either in the "\$250-500,000" range or the "\$5,000,000" or over range, while the average wholesale volume for all firms in the sample was \$500,000 per year. Expected sales for any given year can be predicted through calculations which are within a 75 to 95 per cent accuracy range according to the sample in this survey.

Information received from the manufacturers indicates most firms have increased their volume, in terms of sales, 5-10 per cent over the past five years. Surplus, as a result of over production, is disposed of through seasonal discount sales or sold at factory outlets.

Knowledge obtained regarding the present trends and possible future developments of the regional market indicates the apparel industry is an important part of the Oregon economy. Almost all firms have expanded since 1960 and most firms have tentative plans for expansion to take place before 1973. Plans for future expansion include such items as facilities or plant, location, and diversification of products. Because of improved professional management, more up-to-date production methods and increased automation, the need for additional labor was expected to be minor.

Executives and designers consider the future of the Pacific Northwest Apparel Market, including Portland, good to excellent. Promotional directors felt this market had a moderate to good future. Reasons given for a bright future were: "population increase," "increase of the industries in the Portland area," "image as a sportswear leader," "increase in leisure time for consumers resulting in a need for more casual wear," and "the Pacific Northwest is a natural trade center."

The production of active sportswear and casual clothes is considered to be of major importance in making Portland distinctive as a regional market. The climate and terrain of the Pacific Northwest create an atmosphere appropriate to the production of sportswear. The recreational facilities and opportunities presented in this area have helped to make a thriving consumer market for sportswear. Figures indicate the national buying trends of consumers are leaning toward the purchase of increasing amounts of sportswear and casual clothes.

The manufacturers' opinions concerning the contribution of the Portland Apparel Market to the United States apparel industry were very favorable. Although Portland had not yet become a major regional market, respondents felt "new designs in sportswear" and distinctive "quality" made the Portland Apparel Market significant to the national industry. Portland's potential for growth as a regional market

is judged "unlimited" by the manufacturers participating in this study.

Recommendations

A survey of the Portland Apparel Market was undertaken to study the development and current status of the market in regard to production, distribution and growth potential. The following suggestions for further research may be made.

1. A broader, more detailed study of the apparel industry in the Pacific Northwest, including Portland, Seattle and surrounding areas should be undertaken.
2. More regional apparel markets throughout the United States should be conducted to broaden the existing knowledge of the apparel industry.
3. Comparative studies of many regional markets would give a more complete analysis of the United States apparel industry and be relevant to educational, business and industrial personnel involved in the apparel industry.
4. This study can be used as a basis for similar future investigations more specifically with revisions of the questionnaire and interview techniques (see Appendix C).

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APPENDIX A
LETTER OF INTRODUCTION

MICHIGAN STATE UNIVERSITY, East Lansing, Michigan 48823

College of Home Economics
Department of Textiles, Clothing, and Related Arts
Home Economics Building

Portland is rapidly gaining importance as a leading apparel market and many who are interested in the future development of the apparel industry would like to know more about the Portland Apparel Market and its potential for expansion. Because your firm holds an important place in the Portland Apparel Market, we would like to request your participation in this study.

This study of the Portland Apparel Market is part of a larger project on regional apparel markets under Dr. Elinor Nugent, a member of the research and teaching staff in the Department of Textiles, Clothing and Related Arts, College of Home Economics, Michigan State University. Being a native of the Pacific Northwest and a graduate student in Textiles and Clothing under Dr. Nugent, I am undertaking this study of the Portland Apparel Market as part of my graduate program.

I am planning to be in the Portland Area September 4-14th to collect data. I would like to have a conference with you sometime during this period at your convenience. May I call your office for an appointment when I arrive in Portland?

The information gathered in this study may be of value to educational, business, and industrial personnel involved in the apparel industry. If you are interested in a summary of the results of this study, I will be glad to make it available to you upon request.

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

Sincerely,

(Miss) Joanne Ekenes

(Mrs.) Elinor Nugent
Associate Professor

APPENDIX B
QUESTIONNAIRE

Interview Schedule for Portland Apparel Market Survey

Part I

The fact that Portland is growing rapidly and gaining importance in the apparel industry has prompted a study of the Portland Apparel Market. Because of your influence and responsibility as a leader in the apparel market, I feel you could contribute valuable information about the market. I would very much appreciate your cooperation and efforts in this research.

I would like to begin by asking some general questions about your firm.

1. Name of firm _____
2. Date this firm was established _____
3. Where was this firm originally established? _____
4. Present location of head offices _____
5. Into which of the following categories does your firm fit?

<input type="checkbox"/> Manufacturer	<input type="checkbox"/> Wholesaler
<input type="checkbox"/> Jobber	<input type="checkbox"/> Other (please specify) _____
<input type="checkbox"/> Contractor	_____
6. If manufacturer, which method of production is used?

<input type="checkbox"/> In-side Shop	<input type="checkbox"/> Jobber-Contractor
---------------------------------------	--
7. How would you describe the ownership of this firm?

<input type="checkbox"/> Individual	<input type="checkbox"/> Open Corporation
<input type="checkbox"/> Partnership	<input type="checkbox"/> Other (please specify) _____
<input type="checkbox"/> Closed Corporation	_____
8. How many production plants does this firm operate?

9. Where are these plants located?

<input type="checkbox"/> Immediate Portland Area	<input type="checkbox"/> Other States (please specify) _____
<input type="checkbox"/> Within Oregon	<input type="checkbox"/> Other Countries
<input type="checkbox"/> Within Pacific Northwest	(please specify) _____

10. Is a specific type of merchandise produced in each plant?

____ Yes ____ No

11. Do your production plants operate on a 12 month basis or on a seasonal basis?

____ 12 month ____ Seasonal
 ____ Which Months? ____ Which Seasons? ____

12. What is the approximate number of employees working in the following positions by this firm?

	<u>Men</u>	<u>Women</u>
Executive Officers	_____	_____
Production Managers	_____	_____
Promotional Directors	_____	_____
Designers	_____	_____
Skilled Laborers	_____	_____
Unskilled Laborers	_____	_____

13. What is the approximate rate of turnover in personnel each year?

____ Under 5% ____ 5-10% ____ 10-25% ____ Over 25%

____ Other (please specify) _____

14. Do you feel there is a major reason for this turnover?

____ Yes ____ No If so, what? _____

15. Are your employees affiliated with a union? ____ Yes

____ No If so, which ones? _____

16. What educational level do you require of your employees in the following positions? Check appropriate category.

	Below H.S.	H.S.	College	Grad. S.
Executive Officers	_____	_____	_____	_____
Production Managers	_____	_____	_____	_____
Promotion Directors	_____	_____	_____	_____
Designers	_____	_____	_____	_____
Skilled Laborers	_____	_____	_____	_____
Unskilled Laborers	_____	_____	_____	_____

17. What type of transportation facilities does your firm utilize for merchandise?

<input type="checkbox"/> Truck	<input type="checkbox"/> Water
<input type="checkbox"/> Railroad	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> Air	_____

18. Do you feel your firm has access to adequate transportation facilities?

☐ Yes ☐ No

If not, what improvement in the present transportation facilities would be beneficial to your firm?

19. Which distribution channel does your firm utilize?

<input type="checkbox"/> Factory to wholesaler	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> Factory to retailer	_____
<input type="checkbox"/> Combination of both	_____

20. In what type(s) of retail outlets is your merchandise sold?

<input type="checkbox"/> Department Stores	<input type="checkbox"/> Mail Order Houses
<input type="checkbox"/> Chain Stores	<input type="checkbox"/> Variety Stores
<input type="checkbox"/> Specialty Shops	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> Discount Stores	_____

21. Do you distribute to more than one retailer in a trading area?

☐ Yes ☐ No

22. Do you own any of your own retail outlets? ☐ Yes
☐ No If so, how many? Where?
23. In what price range does the most of your merchandise retail per piece?
☐ Under \$5 ☐ \$5-15 ☐ \$15-25 ☐ \$25-50
☐ Over \$50
24. In what price range does most of your merchandise wholesale per piece?
☐ Under \$5 ☐ \$5-15 ☐ \$15-25 ☐ \$25-50
☐ Over \$50
25. Would you be willing to approximate your yearly whole-sale volume, in terms of sales?
☐ Under \$100,000 ☐ \$500,000-1 Million
☐ \$100-250,000 ☐ \$1 - 5 Million
☐ \$250-500,000 ☐ \$5 Million or Over
26. What percentage has your yearly volume increased over the last 5 years, in terms of sales?
☐ Under 5% ☐ 5-10% ☐ 10-25% ☐ 25-50%
☐ Over 50% ☐ Don't Know

Part II

Now I would like to get more specific and ask you some questions about the merchandise you produce.

1. What types of apparel does your firm produce?

	<u>Women- Girls</u>	<u>Men-Boys</u>	<u>Infants- Children</u>	<u>Accessories Miscellaneous</u>
<u>Coats</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Suits</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Two Piece</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Three Piece</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Dresses</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Separates</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Skirts</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Jackets</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Blouses,</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Shirts</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u>Underclothes</u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>

2. Where do you obtain the materials for your products?

<u>Portland Only</u>	<u>Other States (please specify) _____</u>
<u>State of Oregon</u>	<u>Foreign Countries (please specify) _____</u>
<u>Pacific Northwest Region</u>	<u>_____</u>
<u>Other Regions (please specify) _____</u>	<u>_____</u>

3. For what population does your firm produce apparel products? Check appropriate categories.

<u>Ages</u>	<u>Men</u>	<u>Women</u>	<u>Children</u>
Under 5 years	<u> </u>	<u> </u>	<u> </u>
5-12 years	<u> </u>	<u> </u>	<u> </u>
12-17 years	<u> </u>	<u> </u>	<u> </u>
17-21 years	<u> </u>	<u> </u>	<u> </u>
21-30 years	<u> </u>	<u> </u>	<u> </u>
30-50 years	<u> </u>	<u> </u>	<u> </u>
Over 50 years	<u> </u>	<u> </u>	<u> </u>

4. Do you produce seasonal lines? ☐ Yes ☐ No

If yes:

Which seasonal line is most important in terms of sales?

To what do you attribute this?

If no:

Do you generally produce the same articles year around?
☐ Yes ☐ No

Are most of your lines worn year around?
☐ Yes ☐ No

5. Do you specialize in any particular designs or styles?
☐ Yes ☐ No

If yes:

For what designs are you known?

Do you make notable changes yearly in these designs?
☐ Yes ☐ No

Seasonally? ☐ Yes ☐ No

If no:

Do you produce what is considered fashionable?
☐ Yes ☐ No

Do you change your entire line yearly?
☐ Yes ☐ No

Seasonally? ☐ Yes ☐ No

6. To what areas do you distribute your apparel products?

☐ Portland Only
☐ State of Oregon
☐ All United States
☐ Pacific Northwest Region

☐ Other Regions (please specify) _____
☐ Other Countries (please specify) _____

7. Are you able to keep up with the demand for your products?
☐ Yes ☐ No

If yes:

Do you experience surplus in certain lines periodically?
☐ Yes ☐ No

How do you dispose of any surplus you might have?

If no:

To what do you attribute this?

8. Within what percentage can you calculate expected sales for a given year?

____ Less than 25% ____ 25-50% ____ 50-75% ____ 75-95%
____ 95% or Better

9. How do you predict expected sales for a given year?

____ Previous years' Actual Sales

____ Other (please specify) _____

Part III

Now I would like to ask a few questions on the size and location of your firm.

1. When this firm was established, what would you say was the principal reason for establishment in the Portland area?
- _____

2. Has your firm expanded since 1960? ☐ Yes ☐ No
If so, please specify the type of change.

☐ Facilities or plant _____

☐ Employment _____

☐ Diversification of products _____

☐ Other (please specify) _____

3. Have the owners of the firm ever considered changing locations? ☐ Yes ☐ No

If yes, where and why? _____

4. Do you contemplate expansion within the next 5 years?
☐ Yes ☐ No

If yes:

Do you plan to enlarge present facilities?

☐ Yes ☐ No

Do you plan to expand to a new location?

☐ Yes ☐ No

Where? _____

What will be the main type of production there?

Will you diversify to other products? ☐ Yes ☐ No

If no:

Do you feel the size of your operation is large enough as is? ☐ Yes ☐ No

Do you think you may expand sometime after the next 5 years? (after 1973)

☐ Yes ☐ No

5. Would you rate the following considerations in deciding upon the site for a textile or apparel firm according to their importance, using a scale, 1 meaning "Unimportant" and 5 meaning "Very Important"?

	<u>Unimportant</u>		<u>Important</u>		<u>Very Important</u>
Available Advertising Media	1	2	3	4	5
Available Labor	1	2	3	4	5
Available Resources	1	2	3	4	5
Inexpensive Operation Costs	1	2	3	4	5
Tax Structure	1	2	3	4	5
Transportation Facilities	1	2	3	4	5
Retail Market	1	2	3	4	5
Wholesale Market	1	2	3	4	5

I would like to close this interview with a few general questions about the Portland Apparel Market.

1. What do you think the Portland Apparel Market contributes to the United States fashion industry?

How? _____

2. What, in your opinion, is the future growth potential of the Portland Market? _____

3. Do you think Portland will ever become a major apparel market such as Los Angeles or Dallas? ____Yes ____No

If yes:

What do you think will be major contributing factors to this growth?

If no:

What do you feel is the maximum potential of the Portland Market in relation to other apparel markets?

4. Are there predominant design characteristics of the apparel manufactured in the Portland Market which make it distinctive?

5. Do you feel that one of these characteristics is of more importance than the others and has added to the prestige of the Portland Market? ____ Yes ____ No

If yes, in what way is it more important? _____
6. What factors influence the designs produced in the Portland Apparel Market?

7. In your opinion, what single factor do you consider as most important in making the production of apparel profitable in the Portland Area?

____ Geographic location
____ Inexpensive operation costs
____ Availability of trained personnel
____ Retail Market
____ Wholesale Market
____ Transportation facilities
____ Other (please specify) _____
8. In your opinion, what is the future of the Pacific Northwest Apparel Market?

Part IV

Because of your influence and responsibility as a designer, I would like to ask you some questions concerning your work which I feel will add to this research on the Portland Apparel Market.

1. What type of apparel do you design?

<input type="checkbox"/> Sportswear	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> Lingerie	_____
<input type="checkbox"/> Daytime Wear	_____
<input type="checkbox"/> Evening Wear	_____

2. Do you design under your own name, the name of the firm, or both?

<input type="checkbox"/> Own Name	
<input type="checkbox"/> Firm Name	
<input type="checkbox"/> Both	
<input type="checkbox"/> Other (please specify)	_____

3. For what type of retail outlet do you generally design?

<input type="checkbox"/> Department Stores	<input type="checkbox"/> Chain Stores
<input type="checkbox"/> Specialty Shops	<input type="checkbox"/> Mail Order Houses
<input type="checkbox"/> Other (please specify)	_____

4. How many collections do you show yearly? _____

5. Do you have a special show for the press? ☐ Yes ☐ No

6. Do you have seasonal showings? ☐ Yes ☐ No

If yes:

If no:

Which one is most important? _____
Why? _____

Do you have other methods of showing your collections?
☐ Yes ☐ No
What are they? _____

7. How many collections or lines do you design yearly?

☐ 1 only ☐ 2-5 ☐ 5-10 ☐ Over 10 ☐ Other (please specify) _____

8. What per cent of your collection each year represents new styles?

☐ Under 5% ☐ 5-10% ☐ 10-20% ☐ Over 20%

9. What per cent of your new styles do you consider adaptations of previous styles? ☐ Under 1% ☐ 1-2%
☐ 3-5% ☐ 5-10% ☐ 10-20% ☐ Over 20%
10. Do you find buyers more receptive to the new fashions each year? ☐ Yes ☐ No
- If yes: If no:
- Why? _____

Do you think your new items each year sell better on the retail market than the classics?
☐ Yes ☐ No

Do you think this is because you are noted for a particular design or style which has always been a good seller? ☐ Yes ☐ No

Would you prefer to change your entire collection each year? ☐ Yes ☐ No
11. What is the average number of designs which are discarded in a given collection?
☐ Under 5% ☐ 5-15% ☐ 15-25% ☐ 25-50% ☐ Over 50%
12. Are your designs copied on the mass market? ☐ Yes
☐ No
- If yes: If no:
- Do you wish to prevent copying of your designs?
☐ Yes ☐ No

Can you prevent this in any way? ☐ Yes ☐ No

How do you prevent this?

13. Do you also design woven or knit fabrics? ☐ Yes ☐ No
- If so, what percentage of your total designing is in the form of fabric?
☐ Under 5% ☐ 5-10% ☐ Over 10%
14. Is the design department a separate department within this firm? ☐ Yes ☐ No
15. In your opinion, what does the future hold for American designers and fashion apparel? _____

16. In your opinion, what is the future of the Pacific Northwest Apparel Market? _____

Part V

Because of your influence and responsibility as a promotional director, I would like to ask you some questions concerning your work which I feel will add to this research on the Portland Apparel Market.

1. What audience do you primarily aim for in your promotional tactics?

☐ Children
☐ Pre-Teen
☐ Teenage
☐ Young Adults
☐ Middle Age Adults
☐ Elderly Adults
☐ Other (please specify) _____

2. What forms of promotion does this firm utilize?

<input type="checkbox"/> Direct by Mail	<input type="checkbox"/> Exhibits (Fashion shows)
<input type="checkbox"/> Daily Newspapers	<input type="checkbox"/> Window Display
<input type="checkbox"/> Consumer Magazines	<input type="checkbox"/> Electric Signs
<input type="checkbox"/> Outdoor Signs	<input type="checkbox"/> Industrial Films
<input type="checkbox"/> Business Publications	<input type="checkbox"/> Weekly Newspapers
<input type="checkbox"/> Catalogs	<input type="checkbox"/> Telephone Directory
<input type="checkbox"/> Network Radio	<input type="checkbox"/> Television

3. Do you advertise in national magazines? ☐ Yes ☐ No

If so, which of the following do you advertise in regularly?

<input type="checkbox"/> Vogue	<input type="checkbox"/> Town and Country
<input type="checkbox"/> Harper's Bazaar	<input type="checkbox"/> Glamour
<input type="checkbox"/> New Yorker	<input type="checkbox"/> Mademoiselle
<input type="checkbox"/> Ebony	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> Seventeen	_____
<input type="checkbox"/> Ingenue	_____

4. Do you use an advertising agency? ☐ Yes ☐ No

5. Do you ever advertise in conjunction with other firms?
☐ Yes ☐ No

If yes:

For what purpose?

Are these firms other than clothing firms? ☐ Yes

☐ No If so, what type?

If no:

Are all the products used in your advertising made by this firm? (Such as in magazine ads)

☐ Yes ☐ No

6. Do you hire your own staff of models for advertising your products? ☐ Yes ☐ No

If so, are they obtained locally? ☐ Yes ☐ No

Do you have your own training program? ☐ Yes ☐ No

7. What form of advertising do you see as the most beneficial in the apparel industry?

Why?

8. Do you foresee any new trends in advertising which will have an important impact on the apparel industry?

-
9. In your opinion, what is the future of the Pacific Northwest Apparel Market?
-

APPENDIX C
SUGGESTIONS

The following suggestions, derived from this study, may assist investigators using the interview technique in similar future research:

1. The interviewer should undertake some preliminary investigation to become acquainted with the regional apparel market prior to data collection.
2. A personal contact, influential in the apparel market to be investigated, would be valuable in giving suggestions and recommendations for the proposed research.
3. The interviewer should make clear his intentions, the purpose of the study, the future use of the study and its importance to participating manufacturers.
4. Ample time should be permitted by the interviewer for data collection, allowing for unforeseen events and changes in manufacturers' schedules.
5. A professional approach should be used by the interviewer, assuring participants of their anonymity, if requested.

The questionnaire for this study obtained most of the desired information. However, the following suggestions are made for future use of this questionnaire in similar exploratory research:

1. More "funnel" type of open-ended questions (see Appendix B, Part II, questions 4, 5, 7) should be utilized to gain respondents' true attitudes.
2. The format of the questionnaire should be changed to include no more than two distinct topics per page for easier analysis of data.
3. Questions relating to price ranges should be revised to be realistic for the market under investigation (see Appendix B, Part I, questions 23, 24, 25).
4. Questions directed to designers concerning lines, collections and showings need to include more realistic percentages in future studies (see Appendix B, Part IV, questions 7, 8, 9, 11).

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