AN EXPLORATORY STUDY OF SELECTED FASHION MARKETS IN THE UNITED STATES AND THEIR USE BY APPAREL MANUFACTURERS

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PREFACE

This exploratory study is concerned with the investigation of fashion markets within the women's apparel industry in the United States and the use of these markets by manufacturers of ladies' apparel. The objectives are to describe the role of fashion markets within the apparel industry, to establish the present status and significance of three major market centers (New York, Los Angeles and Dallas), to identify certain characteristics of manufacturers of ladies' apparel and to compare the use of markets in terms of manufacturer characteristics.

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CHAPTER I

INTRODUCTION

The women's apparel industry in America is little more than one hundred years old.[1] Yet in the 1970's the manufacturing of ladies' garments is one of the nation's largest industries. Factory shipments of major items of apparel for women and children exceeded $10 billion in 1972. The industry employs more than 600,000 workers in the major manufacturing divisions alone.[2]

Among modern industries the apparel trade is unique in several ways. In an era of big business, the manufacturing of garments is still conducted primarily in small operations.[3] The method of matching products to their markets is conducted in a direct manner. The promotion and distribution of fashion goods remains primarily the responsibility of the manufacturer. In the production and distribution of women's apparel a seasonal element must be considered.

New York City historically developed as the center of the fashion industry in America and as the main market for distribution. Today, however, apparel is being manufactured in many states, and regional market areas have developed. Statistics for 1973 indicate that, while 62.1 percent of women's and children's apparel was manufactured in New York, 6.2 percent was produced in Los Angeles and 1.4 percent in Dallas.[4]

Purpose of Study

The purpose of this research was to study selected fashion markets in the United States (New York, Los Angeles, and Dallas) and to investigate their use by apparel manufacturers.

The objectives of this study were:

(1) To describe selected fashion markets and their role in the marketing process within the apparel industry.

(2) To identify certain characteristics of apparel manufacturers and to determine the fashion markets used in the distribution of their goods.

(3) To compare selected fashion markets in terms of certain characteristics of the apparel manufacturers who use them.

Significance of Study

There appear to be several areas of study to which an investigation such as this one could make a significant contribution. Studies pertaining to the women's apparel industry in the United States, particularly those investigating the marketing procedure, are scant and dated. New documentation is needed to answer questions concerning the women's apparel industry. What is the current status of the industry? What is the present size of manufacturing firms and what types of apparel do they produce? What market cities are used most frequently? What is the current status of these major market centers? Answers to such inquiries could be of value to persons in business as well as to students of fashion.

An investigation of the marketing process of fashion goods would seem worthwhile since this process appears unusual when compared with the distribution of other consumer goods. In addition, the recent growth of regional markets as a part of this distribution process is a prominent reason for detailed investigation. Is there actually a trend to locate manufacturing plants outside the New York City area where they have been concentrated for so long? Where are manufacturing plants located? What market centers are used most frequently by American manufacturers? Is the use of regional markets increasing? Information pertaining to these questions could provide valuable background data for future inquiries into regional market systems or a specific market center.

Limitations

This investigation was limited to an in-depth study of three major fashion markets in the United States, New York, Los Angeles and Dallas. Brief discussions of other market areas used by apparel manufacturers, however, were included.

The participants in this study were limited to American manufacturers of women's, misses' and junior outerwear (not including accessories) as listed in Poor's Register of Corporations, Directors and Executives.[5] This source contained a listing of manufacturers of all types of goods in the United States and Canada. The volume included: (1) a listing of firms by classification of type of goods manufactured; (2) an alphabetical listing of all firms registered, the address of the firm and a brief explanation of goods manufactured; (3) an alphabetical listing of firms, their executive and directors; and (4) a brief biography of executives of registered firms.

The study of apparel manufacturers was limited to information concerning the firm size, the firm organization, the merchandise classifications and the use of markets. The research did not include questions pertaining to the design or manner of production of garments.

Definition of Terms

Following are trade terms used in this research study:

Apparel Industry - Includes the designing, producing and marketing of men's, women's and children's clothing and accessories.

Inside Shop - Refers to an apparel manufacturing business which contains all the manufacturing processes in its own plant or plant area. The garment is designed, cut, sewn and distributed from one location.[6]

Outside Shop - Refers to an apparel concern that contracts with a manufacturer to do the sewing and finishing of its garments.[7]

Contractor - Refers to an apparel manufacturing firm that does the sewing for other manufacturers.[8]

Line - Indicates a collection of garment styles shown by a manufacturer to prospective retail buyers.

Fashion Market - Refers to any location where manufacturers of apparel meet with retail buyers to show and sell fashion goods.

Market Opening - Means the showing of new lines by apparel manufacturers at the beginning of one of three or more fashion seasons a year.

Mass Production - Refers to production of goods in quantity. Apparel which is mass produced is called ready-to-wear (r-t-w).

Resource - Refers to a retail buyer's term for a manufacturer. Also called a vendor in the industry.

Showroom - Indicates a room in which a manufacturer displays his line in a market area, at the factory or in another location.

Buying Office - Refers to a firm located in a market city which surveys the market and recommends or buys merchandise for retail stores outside the market area.

Summary

The women's apparel industry in America is relatively young, yet ranks as one of the nation's largest industries. The size of firms within the industry, the promotion and distribution of fashion goods and the seasonal timing involved in the manufacture of fashion goods are all characteristics which distinguish the apparel industry from other industries.

It appears that students of fashion as well as persons involved in the apparel business could benefit from an investigation of the marketing process, the nature of manufacturing firms using markets and the growth and development of major market areas. Within certain limitations, this study has probed such areas.

Chapter II of this study includes a review of existing literature pertaining to apparel market centers, including previous investigations of market centers that have been conducted, as well as sources of information pertaining to a number of market centers. In addition, Chapter II presents a background for the study. The objectives of the study are restated in Chapter III, along with detailed methods and procedures used for obtaining each objective.

The findings of the study are presented in two chapters. Chapter IV includes an in-depth discussion of the nation's largest market centers, a factual summary of the present status of three major market areas and a brief description of other frequently-used market centers.

Chapter V contains a discussion of those findings pertaining to the characteristics of the apparel manufacturing firms participating in this study and their use of the various market centers. Finally, a summary of the study, conclusions drawn, and recommendations for future research are included in Chapter VI.

FOOTNOTES

[1] Max Hall, _Made in New York_ (Cambridge, 1959), p. 47.

[2] Jeannette A. Jarnow and Beatrice Judelle, _Inside the Fashion Business_ (New York, 1974), p. 104.

[3] Ibid., p. 108.

[4] Ibid., p. 113.

[5] _Poor's Register of Corporations, Directors and Executives_ (New York, 1974).

[6] Jarnow (1974), p. 419.

[7] Ibid., p. 420.

[8] Ibid., p. 418.

CHAPTER II

REVIEW OF LITERATURE

"Comparatively little research attention has been given to the women's apparel markets in the garment industry in the United States."[1] This statement, made in 1966 by Golly as she began her study of the women's apparel market centered in Dallas, Texas, is still very true today. Recent research, especially, is scant. Of the information now available, the majority was written in the mid-1960's or earlier.

A review of the literature pertaining to the fashion markets in the United States shows that research has been conducted in three directions:

(1) Individual market centers have been explored in depth.

(2) Overviews of important market centers in the country have been written.

(3) Other aspects of the apparel industry have been discussed relative to the distribution and marketing process in the industry.

In order to provide the necessary background for the study, the history, development and present status of the women's apparel industry in America as they relate to the development of market centers has been presented in this chapter. Included in this presentation is a brief discussion of the development of fashion market centers within the marketing structure of the apparel industry, with special attention given to the growth of regional markets.

Exploration of Individual Market Centers

Hall examined apparel production in the New York metropolitan area. His examination resulted in publication of a book in 1959 which focused on the decline of the New York area's dominance in the fields of apparel, printing and publishing and electronics. The purpose of Hall's study was to describe what has happened to the women's and children's apparel industries in New York and to indicate possible future trends.[2]

Actually, the study included not only the Garment Center but the whole New York Metropolitan Region of twenty-two counties. Three main questions were posed by the investigators: (1) How did the New York Metropolitan area become the nation's garment headquarters? (2) Why is this dominance declining now? (3) What will the future of the area be?

Hall spent much time in assessing the major forces tending to lessen the dominance of the New York Market center. Such topics as the women's and children's apparel industries, their labor force, the demand for apparel products and technological changes are also discussed.

The primary conclusion of this study (which included all women's and children's apparel except furs, footwear, headwear and accessories) was that it was the sewing, as distinguished from the designing and merchandising, that tended to move out of the metropolitan region. Products that were standardized and required little skill to produce were the products that were being made outside the New York area.[3]

An in-depth study of the Dallas Women's Apparel Market was conducted by Golly. Her study, completed in 1966, noted the organization of the firms in the area, types of lines designed and manufactured, distribution and promotional activities, the geographical extent and significance of the Dallas market.[4]

In August, 1974, a study was completed by the Natural Fibers Economic Research at the University of Texas at Austin. The study was undertaken to determine, from the Texas apparel industry, the fabrics required in the manufacture of their products. Simultaneously, the textile mill industry was examined to determine whether the products they manufacture are those utilized by the Texas apparel industry. In addition, the study noted the factors that have made it desirable for the two industries (apparel and textile) to locate and remain in Texas.[5]

Overview of Market Centers

Griffin conducted a study in 1949 at Michigan State University. Her thesis was an ambitious survey of sixteen markets in America, their history, development and current status. It included, as well, a review of the organization of the apparel industry, the importance of the International Ladies' Garment Workers' Union and an overview of the nation's Fashion Groups and schools of design.[6]

Several authors in the 1940's and 1950's, such as Chambers[7] and Hayter,[8] devoted some space in their textbooks to a summary of the fashion markets in the United States, noting primarily the location of market centers and the major items of apparel that were manufactured and sold in the market areas. These authors, as well as Stuart in a 1951 study, supported the idea that, while New York was the dominant market for selection and variety, regional markets were growing in importance.[9] They, too, analyzed the reasons for New York's dominance.

In a 1965 text, Jarnow and Judelle gave some attention to the operation of market places from the viewpoint of the buyer of apparel rather than the manufacturer.[10] The 1974 edition of their text gave a short history of the apparel industry centered in New York as well as a brief statement of the status of each regional market center. In this later edition the authors also characterized the apparel industry in the 1970's.[11]

Marketing Process for Women's Apparel

It should be noted that some authors have dealt with the marketing of women's apparel within a larger framework of reviewing the entire marketing process in America. Other authors have discussed apparel markets within the total organization of the entire apparel industry.

In an early publication (1935), Holtzclaw discussed the methods of distributing manufactured goods in the United States. In his discussion of the method of direct selling by the manufacturer to the retailer, Holtzclaw mentioned those consumer goods most frequently distributed in that manner. Compared to others in this category (food and kindred products, products of petroleum, forest products and coal, some appliances and some automobiles), women's apparel had the highest portion of total output (4/5) distributed directly from manufacturer to retailer.[12]

Other authors writing in the 1950's, such as Arnold[13] and Fried,[14] discussed the apparel industry as a whole, tracing the product from the field to the consumer. Within this discussion the activities of the apparel manufacturer in distributing his goods were mentioned. Brief mention was made of the link between the manufacturer and retailer and of the major market areas in the country. A similar approach was taken by Troxell and Judelle in a 1971 text. Their discussion of the organization of the industry was presented largely for the benefit of those studying to be retail buyers.[15] Jarnow (1965) discussed the apparel industry in much the same manner.

History of the Women's Apparel Industry in the United States

A better understanding of the present study is possible when the findings are viewed within the background of the development of the women's apparel industry in the United States. The apparel market as it has developed within the industry is of particular interest.

The women's apparel industry in America is little more than 100 years old.[16]

> The first nucleus of this remarkable industry developed after the Gold Rush in the middle of the 19th century when the more fortunate of the prospectors, returning East with their pockets lined with gold, built elegant town and country houses and proceeded to deck their women folk in silks and satins as befitted their new status.[17]

These ladies purchased their own yard goods and the dressmaking was done by their tailors and dressmakers.

Pre-1900

The invention of the sewing machine by Elias Howe made possible the change to mass production in America.[18] "The production of ready-to-wear started with men's work clothing, either for slaves in the South or for seamen."[19] These early factories became known as "slop shops" because the sailors stored their clothes in "slop chests" during their expeditions.[20]

The Civil War hastened the trend to factory production in urban surroundings with the big demands for army uniforms.[21] The first report on women's ready-to-wear does not appear until the Census of 1860 when the primary products noted were hoop-skirts, cloaks and mantillas.[22] After the Civil War, however, the women's and children's industry grew rapidly as a large portion of the equipment used for making uniforms was converted to the production of clothing for women and children.

The nature of the apparel industry before the turn of the century remains unique in the history of American industries. "Some large merchants and manufacturers owned outside shops, but many preferred to deal with contractors who operated outside shops and made up the manufacturer's cut garments."[23] The latter practice, called contracting, spread rapidly; the size of the individual shops decreased when many tried to enter the apparel business through this route. "Fifty dollars was considered adequate capital for embarking on this career in the 1880's."[24] Sewing machines were available at reasonable prices, on installment, or on rental plans.[25]

As more workers crowded into the industry, working conditions became appalling. The tenement building housed the worst of the contractor shops. "These were the 'sweatshops', in which men and women worked excessively long hours in unsanitary surroundings for extremely low wages."[26]

"Public opinion became aroused when epidemics broke out, and women objected to having their clothes made in tenement rooms, where people cooked, ate, and slept."[27] By the turn of the century, factory and tenement laws forced "sweating" to decrease but the working conditions were little better.

"By 1900 the women's clothing industry consisted of 2,701 establishments, turning out $159,000,000 worth of garments."[28] Most garments being produced were cloaks and suits with a few shirtwaist establishments and some underwear manufacturers. Contracting began to give way to small manufacturing establishments.[29]

1900 - 1950

In 1900, cloakmakers from Manhattan, Brownsville, Newark, Philadelphia and Baltimore held a meeting in Manhattan to discuss working conditions. The result was the formation of the International Ladies' Garment Workers' Union (ILGWU). The new union was not immediately popular, and little progress was seen until 1909, when the union staged a successful strike on the shirtwaist industry, and 1910 when the cloakmakers staged their "Great Revolt." "Louis D. Brandeis, the future Supreme Court Justice, made a basis for the settlement of this strike with the 'Protocol of Peace', providing machinery for the peaceful solution of labor-management disputes in the women's apparel industry."[30]

The garment industry had a great but somewhat delayed reaction to the prosperity of World War I.[31] "Fashion, that strange phenomenon that will lead a woman to discard an otherwise wearable garment simply because it is out of style, became vastly more important in America beginning in the period during and after World War I."[32] American manufacturers began to copy Paris models and mass production moved into full swing.[33]

In the 1920's American women began to desire rapid style changes. The manufacture of dresses competed with the manufacture of suits.[34]

New York City became the nation's center for merchandising the new styles.

The years of the depression were hard on the apparel industry. But the National Recovery Act (NRA) did bring some improvements. Labeling laws were initiated in the 1930's, and the thirty-five hour work week became a reality.[35]

As the 1940's neared, there were changes in the industry, particularly in the composition of the labor force. Previously, laborers of Jewish origin had been dominant. However, by 1937 over one-half of those employed in the industry were Italian. Thirty-two percent were Jewish and five percent were Spanish. One and one-half percent were listed as native American.[36]

Mid 20th Century

The apparel industry in America expanded and diversified during the 1950's and 1960's. The years following World War II were considered the years of sportswear.

> Sportswear, as we think of it today, was not in existence in 1900, but there were manufacturers of separate skirts and blouses who were the foundation of our 1950 sportswear industry . . . . Some active sportswear was being manufactured in 1900, but it bore little resemblance to today's industry.[37]

In sportswear American designers found a field of their own. American sportswear designs had a strong influence on the French couture during these decades.[38]

In the 1960's financial expansion continued.[39] Firm size became more diversified. Hayter reflects upon this phenomenon:

> Side by side with a few giants like Jonathan Logan and Bobbie Brooks, with annual volumes approaching the hundred million dollar mark, [were] many thriving concerns established on an annual volume of one million dollars and a still greater number flourishing on a volume of less than $50,000 a year.[40]

In addition to the variety in the size of companies, during the 1960's numerous production methods developed within the industry. Some manufacturers operated by the outside shop method. They designed the garments, bought the trimmings and, in most cases, cut the dresses. The garments were then shipped to the contractor for sewing and finishing. Completed garments were returned to the manufacturer for shipment to retail firms. However, some manufacturers still created the entire garment under one roof.[41]

During the 1960's, also, there was a trend toward decentralization in the industry. The jobbers tended to remain in the metropolitan areas while the contractors moved their sewing plants into suburban and rural areas. This trend became particularly evident in the New York area.

The status of the ladies' apparel industry in the 1970's has not yet been documented. It has been reported that, presently, the entire apparel industry is responsible for a contribution of $50 billion a year to the Gross National Product.[42] The apparel industry employs 1.5 million people nationwide.[43]

Marketing Activities

Marketing has been defined as a business process by which products are matched with markets and through which transfers of ownership are effected.[44] This broad concept of marketing is purported by Still and Cundiff in their book, Essentials of Marketing, and by other authorities in the field of economics and marketing. This contemporary marketing concept includes the merchandising of products, the physical distribution of goods and other supporting or related activities. It has been noted in the introductory chapter of this paper that the apparel industry is unique in the manner in which many of these marketing activities are conducted.

Although it is one of the largest industries in the nation, the manufacture of apparel is still largely conducted in small operations:

> The apparel industry is unique among major manufacturing industries in that it is still the stronghold of small businesses . . . 70% of those in the industry employ fewer than fifty people.[45]

In the apparel industry, the manufacturer assumes the responsibility for getting his goods directly to the retail outlets. There is virtually no middleman, no traditional wholesaler who distributes the goods as is the case with many other consumer products. One reason for this development is the seasonal element involved in the handling of fashion goods. Fashion changes are rapid. Direct methods of dealing are usually necessary. Only in some staple items such as hosiery, underwear and children's wear does the wholesaler distribute appreciable amounts of merchandise. One recent source describes the pattern:

> Over the years, the marketing activities of the fashion industries have established a pattern of direct distribution to the retailer, heavy reliance upon personal contact between manufacturers' representatives and retail buyers and the use of advertising and publicity to supplement personal selling efforts.[46]

The apparel manufacturer is responsible for the promotion of his own goods. He must advertise and induce the retailer to see his line at the opening of each season.

Development of New York City Apparel Market

New York City has historically been the center of the fashion industry in America and the main market center. Within a few square miles buyers have been able to sample a wide representation of lines in each classification.

During the period after World War I, New York became the primary center for the making and selling of mass-produced garments. This superior position has remained unquestioned until recent years.

Growth of Regional Markets

Over a period of years, as the population spread westward, arrival of goods from the East was slow. Other apparel production and market centers were established and flourished. The presence of raw materials and inexpensive labor aided the growth of other production centers. Griffin analyzed the growth of westward markets:

> The areas chosen for these apparel markets were not entirely accidental. They developed largely because of their geographical position and the growth of small cities and towns in the surrounding areas which created demand for more and better clothing than that sent them from New York. Demand for different types of garments from those of the East was created by differences in climatic conditions and occupations.[47]

Today apparel is being manufactured in many places other than New York and the surrounding areas. Over the last ten years, firms from Texas, California and Florida have become important sources of apparel for stores across the nation.[48] In addition, many retailers in modern America have found that they cannot afford to go to New York more than once a year.

If retailers did not go to New York, then what were Eastern manufacturers to do? Stores across the country must still be served. As a partial solution, the manufacturer sent sales representatives on the road to take his lines to the stores. Somehow he had to induce more retailers to see his lines, so the sales representatives often invited retailers to view the seasonal line in a city hotel for "market."

Slowly these makeshift markets gained in popularity and organization. Groups of salesmen moved from hotel suites to larger buildings, some built specifically for the purpose of showing fashion merchandise. Kay Gomein, President of American Fashion Association, noted the growing importance of markets such as these:

> Regional markets are invaluable in two ways . . . the small retailers in small towns cannot afford trips to New York or California markets, and the salesmen cannot afford to travel to each small town to service the small store . . . .
>
> Therefore . . . the regional markets are the answer. Stores can cover their needs in from one to four days. Salesmen are able to service stores from all over the territory.
>
> Another fact that is valuable is the ability of the small retailer to observe and be aware of fashion trends . . . which can keep them on a par fashion-wise with the city stores.[49]

The term "regional" as applied to the apparel markets is, perhaps, not an entirely correct choice of words as it may imply to the reader a market with limited distribution. Today, several regional markets are now involved in a nationwide distribution of fashion goods. Many have engaged in elaborate promotional activities to attract buyers nationwide. Improved transportation has narrowed time and distance between retailers and markets. In recent years the production and variety of fashion goods has increased in several regional market areas. The term "regional" could properly be used, then, to differentiate other markets from the original apparel market, New York City.[50]

While the New York market remains in a class by itself for variety and assortment, regional markets are growing at a rapid pace. Besides New York, other markets of national importance are Los Angeles (sportswear and swimwear) and Dallas (sportswear, work and play garments). These have showrooms open year round. Other regional markets have developed specifically for the purpose of showing certain classifications of merchandise. Some of these are: Atlanta (medium-priced apparel), Miami (swimwear, dresses and sportswear), Chicago (medium-priced women's dresses and children's apparel) and Kansas City (medium to low-priced dresses, work clothes and boys' wear).[51]

Summary

The existing literature pertaining to fashion markets in the women's apparel industry is scant. Hall (1959) and, more recently, Golly (1966) chose to explore the New York and Dallas markets respectively. The Natural Fibers Economic Research Group surveyed the Texas apparel and textile manufacturers in a 1973-74 study. Griffin (1949) chose to study many market areas. Textbooks such as those written by Chambers (1946), Stuart (1951) and Jarnow and Judelle (1965 and 1974) give general overviews of the market areas.

A number of authors have written about the apparel industry in its entirety. These authors have given some attention to fashion markets within the distribution process of the apparel industry.

The development of the women's apparel industry in America is largely a phenomenon of the twentieth century. New York City and the surrounding area served the nation for many years as the center of production and as the primary market city. The westward growth of population served to increase the need for more and different types of apparel. Now regional markets located in all parts of the nation as well as the New York market serve the needs of the country's retailers.

The methods and procedures used in achieving the purposes of this study are presented in the following chapter.

FOOTNOTES

[1]Jeanne M. Golly, "A Study of the Present Status of the Dallas Women's Apparel Market" (unpublished Master's thesis, Michigan State University, 1966), p. 2.

[2]Max Hall, Made in New York (Cambridge, 1959).

[3]Ibid., p. 7.

[4]Golly.

[5]Natural Fibers Economic Research, Texas Apparel Industry Needs and Texas Textile Industry (Austin, 1974).

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

[7]Bernice Chambers, Selling Fashion Merchandise (Ann Arbor, 1946).

[8]Edith F. Hayter, Behind the Scenes in Fashion Merchandising (New York, 1965).

[9]Jesse Stuart, The American Fashion Industry (Boston, 1951).

[10]Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York, 1965).

[11]Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York, 1974).

[12]Henry F. Holtzclaw, The Principles of Marketing (New York, 1935).

[13]Pauline Arnold, Clothes and Cloth (New York, 1961).

[14]Eleanor Fried, Is the Fashion Business Your Business? (New York, 1958).

[15]Mary Troxelle and Beatrice Judelle, Fashion Merchandising (New York, 1971).

[16]Max Hall, p. 47.

[17]Edith F. Hayter, p. 1.

[18]Ibid., p. 2.

[19]Max Hall, p. 47.

[20]Hayter, p. 2.

[21]Max Hall, p. 47.

[22]Ibid., p. 48.

[23]Florence S. Richards, The Ready to Wear Industry, 1900-1950 (New York, 1951), p. 5.

[24]Ibid.

[25]Ibid., p. 6.

[26]Max Hall, p. 50.

[27]Richards, p. 8.

[28]Max Hall, p. 51.

[29]Ibid., p. 50.

[30]Ibid., p. 52.

[31]Richards, p. 18.

[32]Max Hall, p. 54.

[33]Richards, p. 18.

[34]Ibid.

[35]Ibid., p. 26.

[36]Ibid.

[37]Sixty Years of Fashion (New York, 1963), p. 21.

[38]Ibid.

[39]Richards, p. 30.

[40]Hayter, p. 5.

[41]Ibid.

[42]American Home Economics Association, What Do the Textile-Apparel Industries Expect from Us? Proceedings of the Fourth National Conference, Association of College Professors of Textiles and Clothing (Washington, D. C., 1971), p. 22.

[43] Ibid., p. 23.

[44] Richard R. Still and Edward W. Cundiff, Essentials in Marketing (New York, 1962), p. 3.

[45] Jarnow (1974), p. 114.

[46] Ibid.

[47] Tira W. Griffin, "A Survey of Selected Regional Apparel Markets Producing Women's and Misses' Apparel" (unpublished Master's thesis, Michigan State University, 1949), p. 63.

[48] Alan R. Waldron, "Publisher's Letter," Clothes (January 15, 1974), p. 3.

[49] Kay Gomein, President, American Fashion Association. Personal communication, January 2, 1974.

[50] Griffin, pp. 64-65.

[51] Jarnow (1965), pp. 76-77.

CHAPTER III

METHODS AND PROCEDURES

The purpose of this research was to study selected fashion markets in the United States (New York, Los Angeles and Dallas) and to investigate their use by apparel manufacturers. The objectives were:

(1) To describe selected fashion markets and their role in the marketing process within the apparel industry.

(2) To identify certain characteristics of apparel manufacturers and the markets used in the distribution of their goods.

(3) To compare regional markets in terms of certain characteristics of the manufacturers who use them.

The Role of Markets in the Apparel Industry

In order to achieve the first objective, descriptive information pertaining to each of the major fashion markets was collected. The procedure is described in the collection and treatment of data.

Collection of Data

Specific facts about market centers were sought. The following four categories were used as a guide in collecting information:

(1) History of the market areas.

(2) Manufacturing information.

(3) Present status of the market center.

(4) Market facilities.

A detailed list of the kinds of facts sought appears in Appendix A. These subjects were investigated by means of:

(1) Library research of books, newspapers, periodicals and theses.

(2) Letters of inquiry to officials of trade publications.

(3) Letters of inquiry to market officials or market association officials.

Treatment of Data

After available facts were gathered about each market, the information was reviewed and organized into the following four general categories:

(1) Early History.

(2) Growth and Development.

(3) Present Status and Significance.

(4) Market Facilities.

Special consideration was given to the present status and significance and to the market facilities. Facts about these topics were summarized and placed in three categories:

(1) Significance of the market area.

(2) Present location and physical facilities.

(3) Present size of the industry in the immediate market area.

A form was developed to show the summarization of these three categories. This form was sent to three individuals in each of the respective market areas for their additional comments and suggestions. Those individuals chosen to receive the summaries for consideration were selected on the basis of current activity in the market area in either manufacturing, a market association or in another aspect of the market system. A list of those persons selected to review the summaries of information pertaining to each market area is included in Appendix B of this thesis. The original summary sheet for each market area is also included.

Information, comments or suggestions obtained from the return of the summaries (one from each market was returned) was combined with the results of the library research and original inquiries and subsequently incorporated into the findings of this study. The summary sheets were revised. The revised summaries of each major market appear in Chapter IV of this paper.

Characteristics of Apparel Manufacturers

In order to identify the characteristics of apparel manufacturers, it was necessary to collect specific kinds of data from producers of ladies' apparel in the United States. The sample was identified and a questionnaire was developed for the collection of information about manufacturing firms.

Identification of the Sample

The sample from which the specific kinds of data was to be collected was identified as apparel manufacturers in the United States producing ladies' ready-to-wear. The source selected for use was Poor's Register of Corporations, Directors and Executives.[1] Other sources were reviewed, but Poor's was found to contain the type of information needed for this study. This register contained:

(1) Names of manufacturers categorized by types of merchandise manufactured.

(2) Addresses of the firms.

Section Two, the section of the register containing the Standard Industrial Classification Codes (SIC), was consulted. Four categories were listed for ladies' outerwear.

(1) SIC 2331 - Women's, Misses' and Junior Blouses, Waists and Shirts.

(2) SIC 2335 - Women's, Misses' and Junior Dresses.

(3) SIC 2337 - Women's, Misses' and Junior Suits and Coats

(4) SIC 2339 - Women's, Misses' and Junior Outerwear not elsewhere classified.

When this list was complete, all duplications were eliminated. Section Three of Poor's Register, Corporate Listings, was then consulted. Information about each company was reviewed. Eliminated from the sample list were those firms that Poor's listed as manufacturing only uniforms, work clothing, graduation and choir robes, physical education clothing, ski wear and sport clothing, swimwear, bras and corsets, accessories, bridal attire, maternity wear, western wear and hospital clothes. The number of firms remaining on the list was then tallied at 291.

The current address was obtained for each company according to Section Three of the register. One individual in each company was selected to receive the questionnaire. If the company listed a Vice President for Marketing, a Vice President for Merchandising or a Vice President for Sales, that person's name was selected to receive the questionnaire. If none of the above were listed, the questionnaire was sent directly to the president of the company as listed in Poor's

Register. If the only listing was for Owner or Partner, the questionnaire was sent to the Owner or to the first Partner listed.

All information thus gathered (291 names, addresses and executives) was recorded on a master list for further use. The master list of apparel manufacturers used for the sample appears in Appendix C.

Development of the Questionnaire

A questionnaire was designed in order to obtain the following kinds of information about the apparel manufacturers included in the sample for the purposes of this study:

(1) The organization of the firms manufacturing ladies' apparel.

(2) The size and location of these firms.

(3) The types and price ranges of merchandise manufactured.

(4) The location of market areas used.

(5) Types of retail stores served.

A tentative questionnaire was reviewed by representatives of several manufacturing firms and was revised.

A cover letter was developed to explain the questionnaire procedure. The letter asked specifically that a designated person complete and return the questionnaire. A self-addressed, stamped envelope was included with the form. The final draft of the questionnaire and a copy of a cover letter appear in Appendix D.

Collection of Data

One month was allowed from the date of mailing for return of the questionnaire. At that time a follow-up procedure was utilized. For those in the New York market area which had not responded, a reminder letter and an additional questionnaire were sent to every tenth firm of the original sample list. Contact was made with one person in the Dallas market area and one in the Los Angeles market area. Each was sent a copy of the original sample list for his area with the non-respondents marked. Each contact person was asked to encourage response to the questionnaire. (Several additional responses were realized as a result of these procedures.)

The fifty-seven questionnaires received by July 31, 1974, were reviewed to be certain that ladies' apparel was manufactured by each firm. Only the companies manufacturing ladies' outerwear were designated for use in the study. Questionnaires were eliminated if the firm manufactured other types of apparel exclusively. Firms manufacturing the following types of apparel were excluded: uniforms, work clothing, graduation and choir robes, physical education clothing, ski wear and sport clothing, swimwear, bras and corsets, accessories, bridal attire, maternity wear, western wear, hospital clothes or burial garments. After this elimination process, forty-six questionnaires remained for use in the study.

Treatment of Data

The data were prepared by reviewing the questionnaire and coding the responses for analysis. Each questionnaire was placed in a geographical category by states according to the address given by the respondent. Three major divisions were determined:

(1) Region I - Eastern United States, New York as market center.

(2) Region II - Central United States, Dallas as market center.

(3) Region III - Western United States, Los Angeles as market center.

The basis for these divisions was a listing previously compiled by Hayter for use in discussing the location of manufacturing in the apparel industry.[2] Included in Appendix E is the list of states and regions used in this study.

Each response on the survey form was reviewed. The data from the responses was tabulated for total number and percentage. The findings were presented in table form and each table was discussed. Finally, the results of the computations were reviewed and a summary of characteristics of apparel manufacturers was prepared.

Comparison of Markets

In order that fashion markets could be compared, the relationship between certain characteristics of apparel manufacturers and their use of selected markets was explored. This completed the requirements for Objective III of the study.

Collection and Treatment of Data

The questions on the survey were used to identify characteristics of the apparel manufacturing firms. These questions and their respective responses were coded and recorded on IBM eighty-column cards. Three questions (numbers 10, 13 and 14) were not included in computer analysis. However, the results of these questions were hand tabulated and used in the identification of apparel manufacturers' characteristics.

Statistical Analysis

Twenty characteristics of apparel manufacturers were compared with the use of permanent showrooms in New York, Los Angeles and Dallas. The characteristics of apparel manufacturers used in the comparison of markets were:

Status of Firm

(1) Firm location.

(2) Age of firm.

Size of Firm

(3) Annual dollar volume.

(4) Number of manufacturing divisions.

(5) Number of sales representatives.

Nature of Merchandise Produced

(6) Manufacture ladies' apparel.

(7) Manufacture men's apparel.

(8) Manufacture children's apparel.

(9) Manufacture junior apparel.

(10) Manufacture misses' apparel.

(11) Manufacture women's apparel.

(12) Number of items of apparel produced.

Showroom Location

(13) Permanent showroom in New York.

(14) Permanent showroom in Los Angeles.

(15) Permanent showroom in Dallas.

(16) Permanent showroom in locations other than New York, Los Angeles and Dallas.

(17) Number of temporary showroom locations.

Types of Stores Served

(18) Serve Group I retailers (Boutiques, Specialty Shops and Junior Department Stores).

(19) Serve Group II retailers (Multi-Unit Department Stores, Chain Stores and Mail Order Houses).

(20) Serve Group III retailers (Discount and Variety Stores).

These twenty characteristics were divided into two categories for the purpose of statistical treatment:

(1) Category 1: Several of the characteristics consisted of two sets of dichotomous information. The x^2 statistical test was employed to determine the significance level of the relationships between the characteristics and permanent showroom locations in the designated market areas.[3] Significance was considered at the .05 and .01 levels. Characteristics included in Category 1 were: firm location, permanent showroom locations in New York, Los Angeles and Dallas and type of retailers served (Group I, II or III).

(2) Category 2: Several of the characteristics consisted of two sets of variables, one dichotomous variable and one continuous variable. One appropriate test for point biserial information is the ϕ coefficient which is interpreted as the Pearson r.[4] Significance for the correlation coefficients was considered at the .05 and .01 levels. Characteristics included in Category 2 were: age of firm, size of firm by annual dollar volume, size of firm by number of manufacturing divisions, size of firm by number of sales representatives, manufacturing of men's, women's and children's apparel, manufacturing of junior, misses' and women's apparel, items of apparel manufactured and the use of permanent showroom locations other than those in the three selected markets.

Results of the statistical analysis of each characteristic were presented in tables in the index. Those characteristics which had significant relationships were presented in table form and discussed in Chapter VI. The final comparison of the three selected market areas in terms of the characteristics of apparel manufacturers was presented and discussed.

Finally, the study was summarized. Conclusions were drawn from the findings of the research. Recommendations were made for similar and related studies.

Summary

This study consisted of three objectives within the overall problem statement. The first of these stated objectives, to describe the apparel markets and their roles, was carried out through library research and letters of inquiry to persons in the industry. Objective II, the identification of characteristics of apparel manufacturers, was achieved through the development and use of a questionnaire. The questionnaire was sent to a sample of 291 American apparel manufacturers as listed in *Poor's Register of Corporations, Directors and Executives*. The responses to the questionnaire were tabulated and characteristics of apparel manufacturers discussed and summarized. The responses were coded for statistical analysis, analyzed, presented and discussed. Objective III, comparison of markets, was completed by a discussion of the three major market areas in terms of the characteristics determined by the questionnaire and its analysis.

The findings of this study were organized in their respective parts and presented in two chapters. These were: Chapter IV, Apparel Markets in the United States; and Chapter V, Manufacturers and Markets.

FOOTNOTES

[1] _Poor's Register of Corporations, Directors and Executives_ (New York, 1951).

[2] Edith F. Hayter, _Behind the Scenes in Fashion Merchandising_ (New York, 1965).

[3] Joan Selkowitz, _Introductory Statistics for the Behavioral Sciences_ (New York, 1971), p. 229.

[4] Ibid., p. 240.

CHAPTER IV

APPAREL MARKETS IN THE UNITED STATES

The information contained in this chapter focuses on the description of three major fashion markets and the role of each in the apparel industry. These findings pertain to Objective I and present descriptive information pertinent to each of the three major market areas in the United States including historical growth, present location and status, and a factual summary of the significance of each market. Also presented are brief descriptions of other market centers in the United States.

Major Market Centers

In the United States, three regional centers are considered as major markets for the women's apparel industry. New York, located in the East, Los Angeles, on the West Coast, and Dallas, in the Southwest, are the nation's leading cities in terms of apparel design, production and distribution.

New York

The New York market area ranks first in design, production and marketing of ladies' apparel in the United States today. Located primarily along Seventh Avenue is the greatest ready-to-wear market in the world and the heart of one of the most important segments of the country's economy.[1] For many, the term "Seventh Avenue" has become synonymous with the women's fashion industry.[2]

Early History. At the outset of mass production of women's apparel, no one city or area was supreme.[3] "Then came the events that insured New York's dominance in women's fashion."[4] Immigrants from Eastern Europe came to America by the hundreds of thousands.[5] Between 1880-1910 immigrants arrived at the port of New York from Russia, from Austria-Hungary and from Rumania to meet their families and to respond to the call of industrial America.[6] Many were skilled tailors and went immediately into the apparel industry.

Growth and Development. During and after the period of World War II, American women began to take an interest in fashionable garments. Americans liked rapid style changes and wanted copies of Paris dresses. Manufactured garments began to fill this need and desire. The coincidence of the arrival of the skilled immigrants and the fact that ready-to-wear was gaining in popularity[7] were events that permitted New York City "to leave all its rivals behind in the production of apparel."[8]

New York City had a huge pool of skilled, cheap labor, a location not far from the woolen mills of New England and access to the cotton mills of the South via the Mississippi River and the Erie Canal. New York was also the country's largest city and the center of fashionable society.[9]

When the 1920's brought rapid style changes, New York became the center for displaying and merchandising the latest fashions. "A key factor in this concentration was the erection, in the 1920's, of several tall, completely fireproofed buildings for showroom and factory use."[10]

By the beginning of 1930 there were 3,500 dress concerns in New York; by 1933 the number had dropped to 2,300. In New York City alone, 81.7 percent of dress manufacturers went out of business.[11]

The rise in use of the motor vehicle contributed to a trend of locating manufacturing plants outside the metropolitan area of New York. Improved transportation meant that the location of production sites could be more distant from the place where goods were merchandised. In the 1930's plants began to spring up in the metropolitan region outside New York City.[12] World War II served to reverse this trend to decentralization. "New York and other big centers which had lost business to decentralized markets for over a quarter of a century benefited when the latter lost their competitive advantage of cheap, plentiful labor."[13] By 1946 a majority of the nation's outerwear industry was again located in New York.[14]

Several additional factors should be noted at this time, factors contributing to the continued growth of Manhattan as the chief fashion market in the nation. Located in New York were an impressive array of "external economies," that is, businesses supporting and contingent to the dress industry.[15] There was a vast reservoir of design talent and production knowhow.[16] New York has had an added attraction in that it maintained a flow and exchange of ideas, personal communication and face-to-face contact that was necessary in a fast-paced industry.[17, 18]

Almost since the advent of ready-to-wear, New York has remained the undisputed fashion capital of America.[19] In mass production of women's apparel it has been declared the world capital.[20] American retailers went to New York because they could save money by concentrating all their buying in one center. If retail buyers could not get to New York, they could still purchase a great variety of merchandise through a resident buying office or through a firm's own sales representative on the road. In summary, New York has always been considered in a class by itself in the creation and merchandising of ready-to-wear.

Present Status. Recently there has been increased discussion about the status of the New York City market area. This discussion is not new, however. In 1949 Griffin stated:

> In spite of the many advantages, there are those who feel that New York must strive hard to retain her leadership in the industry. Many manufacturers are concerned as to the future of the market, while others feel it will always be ahead of its rivals.[21]

New York manufacturers were cognizant of the growth of other fashion centers.[22] But these centers were fairly specialized as to the type and price ranges of their products.[23] Eastern manufacturers did not seem concerned. Griffin summarized:

> The New York market is inclined to accept its supremacy as traditional . . . . Critics of the New York market think it should regard its future with less complacency.[24]

Hall reported from his findings:

> The attractions of the [New York] Region have enabled it to remain far ahead of other apparel centers but have not been powerful enough to offset the outward shifts.[25]

However, he said that "it was the sewing, as distinguished from the design and merchandising that tended to flee the Region."[26] According to this 1959 study, it is the manufacturing of lower-priced garments and the standardized manufacturing processes that have been taken up in centers outside the New York area.[27]

In the 1970's the discussion is still ongoing. Critics are still present and quite adamant in reminding New York of its status.

> No, New York, there is an America. And they eat, breathe, buy and create apparel out there. And the sole purpose for their existence is not to help further benefit the citizens of Fashion City. It is a bitter pill to swallow but, then again, more men have choked on shibboleths than on cherry pits.[28]

A 1974 cover story in Clothes Magazine paints the present picture of the status of the New York apparel industry and market system very clearly.[29] The editors of the magazine noted that more and more firms located in New York are going out of business and that unemployment in the needle trades continues to rise. Some early factors contributing to the rise of New York as the nation's top apparel center are now no longer present to a great extent. Manufacturing techniques are becoming more sophisticated outside the metropolitan area. In addition, many firms have been priced out of business by unions. New York firms must pay real estate costs in excess of out-of-town competition. Shipping costs are more expensive in the heart of New York. Small retailers, for so long the outlet for many small manufacturers, are giving way to larger concerns. Social revolutions, such as the sexual and feminist movements, have put people in basics, mostly pants. Inflation in the 1970's has raised prices and fewer pieces are being consumed.

New York, however, has the qualifications to be the fashion center of the world as well as of America.[30] New York is the central headquarters of piece goods design and the primary market due to the location of mills, converters and knitters there. It is a basic market for retailers due to the location of major buying offices in the city. More executives in retailing, manufacturing and textile production work in closer proximity than in any other place in America, thus creating the opportunity for interaction of ideas. New York is the home of better merchandise since the majority of this type of firm is located there. The city houses three mail order chains and the three major television networks.

New York, however, falls short of its potential for several reasons. It fails to realize that the old methods of introducing fashion are obsolete. "Fashion must be considered in terms of its end use and not in the concept of the creator."[31] The industry in New York has failed to recognize and cultivate social trends such as the sexual revolution. Finally, the various segments of the apparel industry still find themselves unable to work together.[32]

It is also true that regional markets have carried out a great deal of promotion, whereas the New York market has had to do relatively little because of its historical prominence. Recent efforts by New York City officials, such as renaming Seventh Avenue "Fashion Avenue" and the creation of a promotional group called Fashion Capital of the World, are efforts to assure the nation's retailers that New York is still in the fashion lead.[33] This group and other supporters of the New York market area remind the public that today more than 80 percent of American fashion is designed and manufactured in greater metropolitan New York.[34] Some 2,000 firms annually produce apparel valued at $4,050 million.[35]

<u>Present Location</u>. Regardless of its status, the New York garment industry today is still found largely where it has been for decades, concentrated within a distance of one block east or west of Seventh Avenue, from 30th to 40th Street (see Figure 1).

In summary, New York has traditionally been the largest center for production and distribution of women's apparel in America. The amount of apparel designed, produced and distributed in New York is of major importance to the apparel industry in the 1970's. For a factual summary of the significance, location and size of the New York market see Table I.

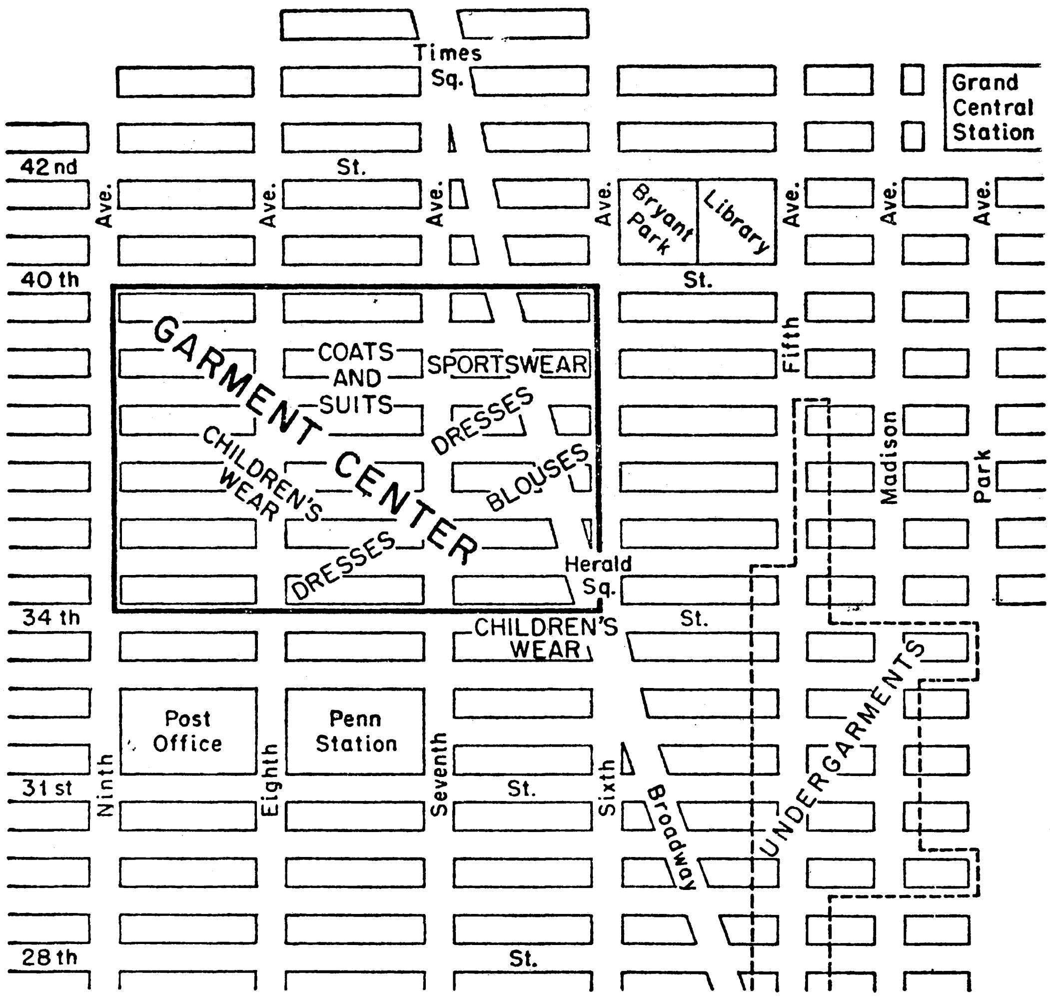


Figure 1. Location of New York Garment Center

TABLE I

NEW YORK - WOMEN'S APPAREL MARKET

Summary of Factual Information
Significance of Market --Historically considered the fashion capital of the United States --Considered the world capital for women's r-t-w in terms of variety, sales volume, and production --Produces all types of women's apparel including coats, suits, day and evening dresses, sportswear and accessories of all kinds --Maintains supremacy in abundance of production knowhow and design talent --Remains the nation's largest center for marketing, merchandising and promoting ladies' r-t-w --Manufacturing largely done in multi-plant operations (jobber-contractor system)
Location of Physical Facilities --Showroom and factory space concentrated on Seventh Avenue between 35th and 40th and bounded by 8th and Broadway (Avenue of the Americas) --Trend to locating manufacturing plants outside the metropolitan area
Size of Industry in Immediate Market Area --First in the United States in terms of production. More than 60% of apparel designed and produced there --Number of firms engaged in manufacturing of women's coats, suits, blouses, dresses and sportswear - about 2,000 --Annual (1973) volume of these firms - $4,050 million

Los Angeles

The second most important fashion market in America is the West Coast, primarily the city of Los Angeles. This market accounts for 10 - 12 percent of the manufacturing and marketing of fashion goods in the country today.[36] It has been and is now known as a sportswear market although firms in the area currently produce apparel and accessories in a broad range of categories and price levels.[37, 38]

Early History. The first attempts at producing ladies' apparel in California began around 1920.[39] In fact, according to a report given in 1951, only 23 firms of 518 then in existence pre-dated 1920.[40] Early manufacturers were severely handicapped by the geographical distance from the East Coast, the main centers of fashion and textiles.[41] Lacking the new fabrics being produced by the big mills, California manufacturers utilized what they could get.[42] The result of their ingenuity was the use of faded blue denim, hopsacking, osnaburg, and unbleached muslin for apparel. These fabrics were made into play and work clothing that was well suited to the California climate.

Growth and Development. The growth of the apparel industry in California was aided by the state's natural fiber resources, cotton and wool. California is a cotton growing state. The type grown is a long staple, white, very strong Egyptian strain.[43] Cotton apparel belongs in California's warm climate. It is worn year round, in town and country, and has been a basic textile around which the California apparel industry was built. Wool from California-raised sheep has also been important.

In 1932 the Olympics were held in California, spurring the popularity and acceptance of sportswear and bringing national focus on the casual California life.[44]

From 1939-1947 the market area showed a 300 percent gain in the value of manufactured goods.[45] The Fashion Group of Los Angeles, in 1945, noted that the fashion market in Southern California was worth $300 million.[46] This exceptionally rapid growth was largely due to the fact that sportswear was becoming an American way of dress.

Sportswear had not been promoted by the French couture. It seemed that this area had been left wide open for American promotion and exploitation.[47] California manufacturers chose to make and to promote items of dress that were important to their California customers. "They designed clothes essentially for California living, functionally beautiful, simple clothing, readily recognized by its styling and color."[48]

Although some doubt the influence and importance of the movie industry on the growth of the Los Angeles apparel market, it can be stated that the film designers had a profound effect on design. "It has been through the films that acceptance of the styles designed for and worn by movie stars has come."[49]

The focusing of American movie fans on the stars and their lives made the California climate and way of life enviable and increasingly promotable. It was the type of life and dress that people all over the nation were eager to emulate.[50]

> The widespread interest in these people [movie stars] and the general popularity of motion pictures as a form of entertainment provided the designers and manufacturers of the Los Angeles market with a means of promotion more dramatic, and probably more effective, than that available to designers in other sections of the country.[51]

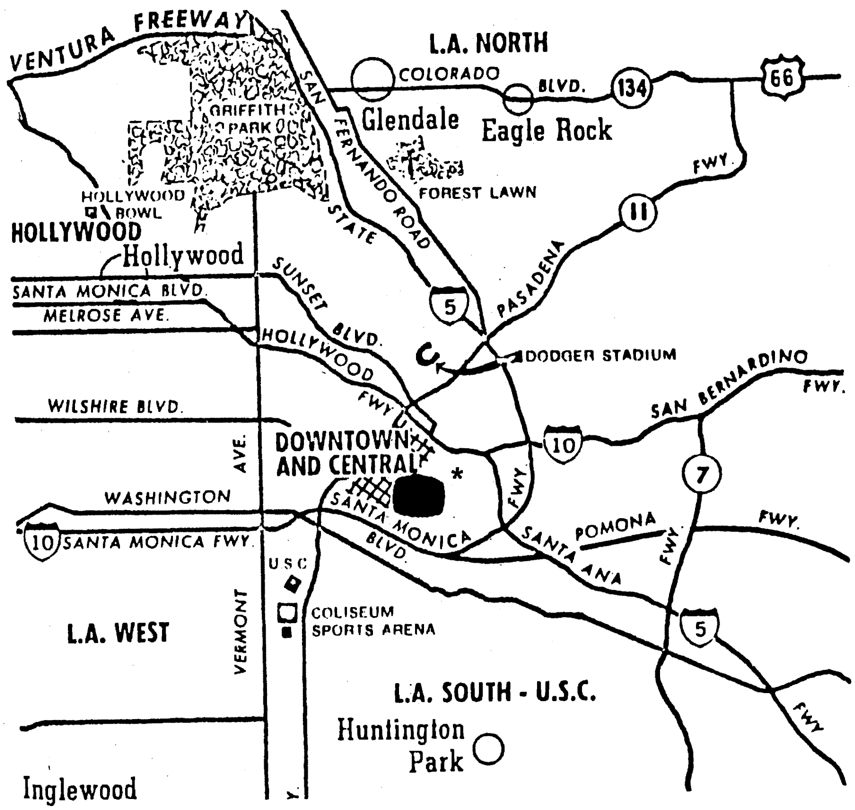
Most would agree that, while climate and promotion of the California life style have been important to the growth and development of the market, the "distinctiveness" and originality of the fashions themselves were what made them successful."[52] Some "firsts" in California designs were the backless bathing suit, the topper jacket, pedal pushers and the topless swimsuit.

The market area has succeeded because various groups of people have believed in it and promoted it. Groups such as the Affiliated Fashionists of California, the Los Angeles Fashion Group and the Associated Apparel Manufacturers of Los Angeles were early promoters of the California market.[53] Another such group, California Fashion Creators (CFC), plays an important role today. CFC is an association of apparel and accessories manufacturers. Its primary concern is stimulation of national demand for California-made products.[54]

Present Location. In the 1970's California manufacturers and others from all over the world have found a home for the display of their goods in Los Angeles. The California Mart, located in downtown Los Angeles (see Figure 2), was begun in 1962 on land purchased ten years earlier by Harvey and Barney Morse, two brothers active in the fashion industry. The first building was completed in 1964, the same year that ground for the second was broken.

> The Mart was planned as an International Merchandise Center of display and sales showrooms for wholesale manufacturers of men's, women's, and children's wearing apparel, including linens and domestics, textiles, notions, jewelry and shoes.[55]

Prior to the building of the Mart, buyers coming into Los Angeles had to cover a tremendous distance between factory locations.



*California Mart

Figure 2. Location of Los Angeles Garment Center

In the Mart there is office space for over 4,000 lines and some 1,000,000 square feet of display space. The Mart features underground parking and a unique high-speed escalator connecting all floors for inter-floor travel. Merchandise is displayed from the United States and Canada as well as from the Near and Far East and Central and South America.[56]

The building of the Mart helped to improve the central city area of Los Angeles.[57] The first two buildings were completed by 1966. The recently completed third building (1972), Phase III, brings the cost to more than $45 million and two million square feet of floor space. It offers the Fashion Theater for buyers to preview lines at morning breakfast showings, afternoon luncheons, and evening cocktail hours. This is the most ideal facility for Fashion Shows in Los Angeles.[58] The theater seats 600 people and features a de-mountable runway for fashion shows. The Mart has plans for Phase IV and Phase V.[59]

The Cal Mart is open 52 weeks a year, but there are five main market times which feature the opening of lines: Summer market in January, Transition market in March, Fall market in May, Holiday market in August and Spring market in October.[60] The Los Angeles market has been known as a type of test market because the collections are traditionally unveiled in advance of other market lines to give buyers early indications of what to expect for the coming selling period.[61]

Present Status. The California Mart brought a tremendous boost to the economy of the industry and the state of California. Sales from 1965-1971 went from $848 million to $1.4 billion. By 1973 the sales volume of the California apparel industry reached the $1.89 billion mark.[62] The women's apparel industry in Los Angeles (198 firms) accounted for $378 million of this.[63] It was predicted that in 1974 the apparel industry in California would employ 93,000 persons. Some 52,900 of these would be in the women's segment.[64]

In spite of rising inflation, fabric shortage and some labor problems, the future of the California apparel industry is bright. Continued monetary growth is expected.[65] The continued trend to informal lifestyles in America will likely continue to boost the demand for California sportswear and casual-type wear.[66]

In summary, the area of apparel production and distribution located on the West Coast of the United States and centered in Los Angeles is a market area of national importance in the apparel industry. The focus of design emphasis is sportswear and swimwear. See Table II for a summary of the significance, location and size of the Los Angeles market.

Dallas

The growth of the apparel industry in Dallas seemed to parallel the development of the city itself. The industry grew naturally and simultaneously with this economic capital of the Southwest. Today the Dallas market area accounts for three percent of the apparel designing, manufacturing and marketing in the country.[67]

Early History. The year 1914 is cited as the beginning of the apparel industry in Dallas. The credit for the groundwork for the manufacture of apparel should be given to the city fathers who, in 1875, passed far-sighted laws which gave tax exemptions to small manufacturing plants.[68]

Graham wrote a more imaginative story of the beginning of the fashion industry in Dallas:

TABLE II

LOS ANGELES - WOMEN'S APPAREL MARKET

Summary of Factual Information

Significance of Market

--Primarily known for sportswear and casual wear, although broader categories and price lines are being produced annually
--Known as an international merchandise center - products from United States, Canada, the Far East, Central and South America
--Presents five major market openings, although Mart is open for business 52 weeks a year
--Considered a test market for consumer acceptance of styles, colors, and fabrics
--Size of California Mart recognized as a major factor in marketing of goods (4,000 lines shown annually)

Location of Physical Facilities

--Showrooms located in California Mart, 110 E. 9th Street, Los Angeles

Size of Industry in Immediate Market Area

--Second to New York in terms of production of women's apparel - 6.2% of United States' sales
--Number of firms manufacturing women's coats, suits, blouses, dresses and sportswear - about 198
--Annual (1973) dollar volume of these firms - $378 million

> Rufus Higginbotham and Augustus Lorch were competitive jobbers back when Dallas was a very small town. Each would go to New York to buy clothing for resale in Dallas and come home with guaranteed 'exclusives' for his territory. Time and again, the 'exclusives' would both prove identical. In a fury, both gentlemen decided to manufacture their own garments, and the Dallas apparel industry was born.[69]

In the 1920's buyers were treated to their first show by an organization of apparel manufacturers and jobbers in the Dallas area known as the Style Show Association. The place was the old Opera House at Main and St. Paul Streets.[70]

Growth and Development. By the 1930's, Dallas manufacturers began to specialize in casual sportswear, separates, and one-piece "wash dresses." These became the foundation for today's industry.[71] Dallas fashions had begun to attract outside buyers. Markets were held in Dallas or Fort Worth, depending on available hotel space and city activities. At the market held in 1939, most buyers were staying in Dallas hotels but were planning to do their shopping in Fort Worth. Fortuitously for Dallas, the weather produced a blizzard and ice storm which made transportation to Fort Worth impossible. The buyers bought their goods in Dallas, and the market has continued to grow since that date.[72]

At the advent of World War II, five of the manufacturing firms in Dallas were grossing more than $1,000,000 per year. Their basic product was sportswear.[73] But the war brought market proceedings almost to a standstill. "The government requested curtailment or suspension of conventions and trade shows, so the market dwindled to almost nothing."[74] Many of the young salesmen were serving in the armed forces. But when they returned, business was brisk, with merchandise and rooms for show both at a premium.[74]

Casual wear, sportswear and the one-piece dress continued to be the foundation for the garment industry centered in Dallas. Most of these were copies of couture garments, styled and adapted to the Southwestern woman and her way of life. How did the rest of the fashion world react to these new firms and their designs? According to Graham:

> A few firms--Nardis, Page Boy, Howard Wolf--began to advertise, and the name 'Dallas' began to be murmured in the hallowed halls of fashion groups across the country. Unfortunately, the tone was seldom admiring. Dallas specialized in 'dumb dresses', copied cheaply from better houses to satisfy the need of big volume buyers.[75]

Manufacturers in Dallas were making their fortunes, but the fashion makers in the country scoffed.

In the late 1940's, Dallas continued to make its way in the American fashion scene as a center of "creative sportswear."[76] In 1949 Griffin noted that Dallas had become the fashion center of the Southwest and, in the opinion of some, the leading fashion city in the United States. "Dallas is said to have more fashion-conscious young women than any other city in the United States."[77]

Many of the firms so important to the present industry were founded in the 1950's. They manufactured by the "inside shop" method as opposed to the "outside shop" system.[78] As late as 1966, most firms still cut and produced the garment in one plant, then shipped directly to the retailer. Some larger firms did have plants in smaller towns outside Dallas where portions of garments were made.[79]

Several factors in the early growth of Dallas as an apparel center have been noted. Additional growth factors became important in the development of the industry. Establishment of railroads gave Dallas a head start over Southwestern cities on becoming an important distribution center. The influx of cotton and cotton buyers became an important source of income to the people of the city.[80] However, the beginnings of the oil industry provided the money, the clientele and the demand for fashion garments.

What other factors have spurred and maintained the growth of the Dallas market area? The historical and geographical features were important. The foresight of the city government and help of the fashion groups in the area aided the growth. The Market Center, in particular the Apparel Mart, had played a crucial role in the growth of the Dallas market area. Earlier showings and a transitional market made Dallas a test market for many manufacturers. The guidance and services offered to buyers and representatives by the activities centered in the Mart have been contributing factors.

Support of the leading retail stores in Dallas likewise played a significant role in obtaining wide prestige for the market. Local retailers cooperated with manufacturers by promoting Dallas merchandise in such ways as special window displays of Dallas-designed clothes.[81]

In 1966 Golly noted repeatedly that the success and the significance of the Dallas Apparel Market was due to the fact that its members contributed "distinctive, fashionable, medium-priced apparel well suited to the Southwestern way of life."[82] She continued:

> The Dallas Market, considered one of the most important fashion markets in the nation, is known for its production of fashion apparel with the distinctive "Dallas look" than for its volume production of innovative fashion trends.[83]

"Ask a fashion expert about Dallas couture, and he (or she) will sniff and inform you that there is no couture in Dallas."[84]

Participants in Golly's study (39 of them) agreed that the Dallas Women's Apparel Market did adapt (not copy) couture designs to fit the needs of its clientele. The industry was unique in the production of fashions with that "Dallas look."[85] This uniqueness seems to be a definite success factor. Dallas designers and manufacturers ignored the fads and abrupt changes of Europe and New York. They designed quality clothing, packable, washable, suitable for day-to-day living. Women could wear them to morning meetings and out to evening dinner.[86]

Graham reflected the success of the market but did not degrade the industry for the fact that Dallas designers have not been known for haute couture clothing. "Dallas Couture, if not 'haute', is at least 'middle'. And while the couture houses have been going broke in recent years, Dallas 'middle couture' has sailed serene financial seas."[87]

Present Status. In the 1970's, sportswear and separates are still important to the Dallas market, as is the dress. These manufacturers are now showing and producing two-piece dresses, two and three-piece suits, evening and holiday dresses. These manufacturers participate in market showings nationwide. Though their main outlet is in Dallas itself, some firms show in markets in New York, Los Angeles, Chicago, Atlanta, St. Louis and Miami.[88] Dallas-produced merchandise is but a part of the Dallas market, however. Dallas is now a display center for manufacturers all over the southwest.[89]

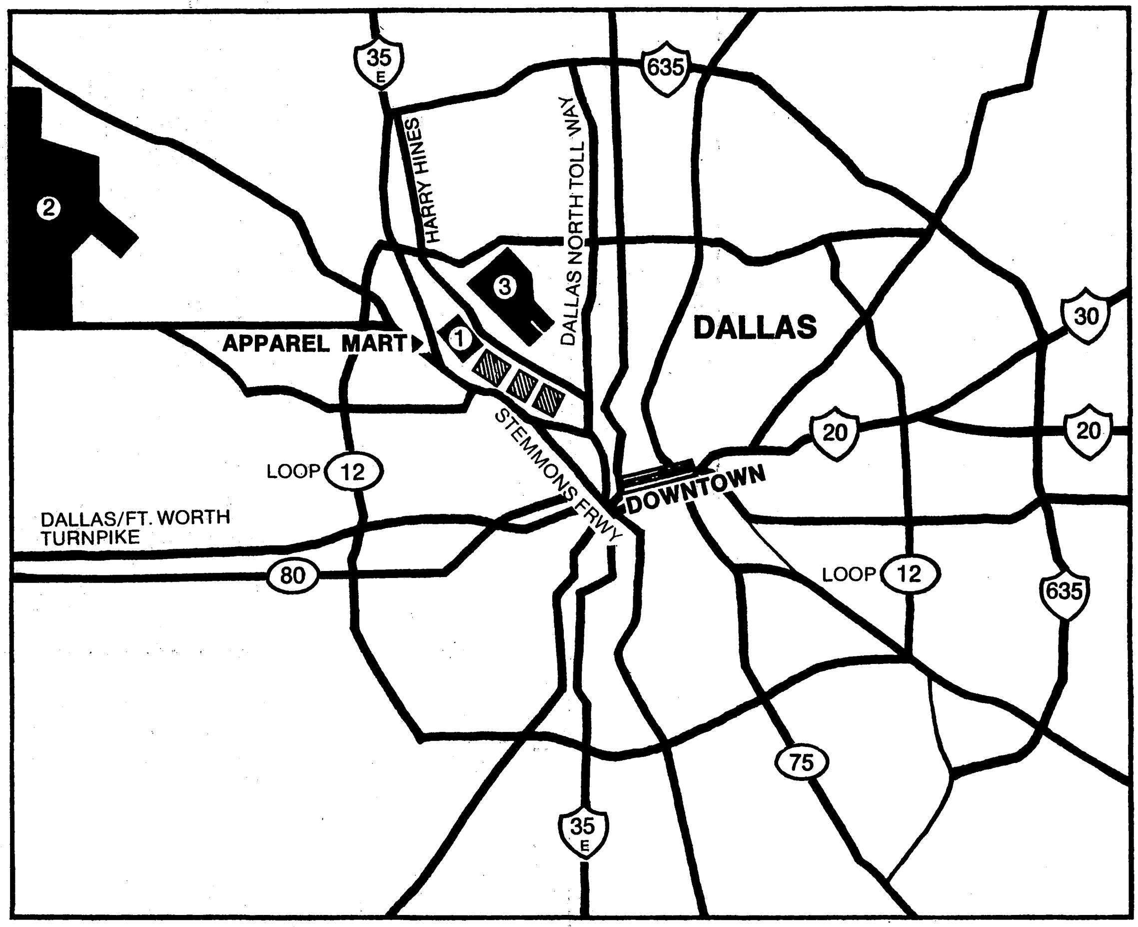
The industry means much to modern Dallas. There are some 52 women's apparel manufacturing firms in Dallas, producing $220,600 in goods annually.[90] Market week brings thousands of buyers. Millions of dollars change hands when market is in session in Dallas.[91]

What about the future of the Dallas market? Graham believes that much of the success ahead lies in the hands of the designers.[92] Golly noted that the average firm employed two designers. Most produced apparel under the name of the house rather than the name of the designer. Most copied and adapted designs from other sources.[93] Does Graham suggest that this practice is changing with the discovery and use of new design talent? Perhaps. She did say that, "Although many of them are still 'knock-off' houses, many Dallas manufacturers have at last discovered fashion."[94] Today officials of the Dallas market claim that Dallas has its own designers of couture caliber. The chain producers who sell at the Dallas market are the big adapters of couture fashions.[95] Their designs may not make headlines, but women will be proud to own and wear them.[96]

Present Location. The home of the Dallas market today is no longer Dallas' downtown hotels. In October, 1964, the Apparel Mart, 2300 Stemmons Freeway, was officially opened (see Figure 3). The Apparel Mart is a private enterprise, owned by the Apparel Mart Company, Trammel Crow, Chairman of the Board. It is a part of the Dallas Market Center Complex which also includes the Decorative Center, the Dallas Home Furnishings Mart, the Dallas Trade Mart and Market Hall.[97]

It would be difficult, at best, to assess the impact of the Dallas Market Center and the markets held there upon the industries that it serves. It is easy, however, to see that what occurs there is unique. Thousands of manufacturers and their goods are linked to some 200,000 buyers from all over the nation.[98] Buyers come from 50 states and many foreign countries to attend 21 markets held each year.[99]

The Apparel Mart is a gigantic structure built at a cost of $20 million. Surrounded by acres of free parking, five stories encompass 1,300,000 square feet of showroom space. There are 1,200 permanent showrooms as well as 350 transient rooms. Also under this roof are lounges, offices, and food service, escalators and elevators which move the traffic rapidly from floor to floor.[100]



1. APPAREL MART **2. DALLAS/FT. WORTH REGIONAL AIRPORT** **3. LOVE FIELD AIRPORT**

Figure 3. Location of Apparel Mart, Dallas

The heart of this incredible building is the Great Hall. "A giant, cavernous theater, it is inspiring in its still, quiescent beauty between markets and tremendously exciting in its crowded crunch when market is on."[101] The Great Hall is 280 feet x 150 feet and 57 feet in height. Balconies opening onto the hall from the lobby of each floor overlook the Mart's major fashion show-staging facilities and the cafeteria. The Hall seats up to 4,000 auditorium style, 2,400 banquet style.[102]

The Apparel Mart also houses the Fashion Theater, a 7,900 square-foot ballroom accommodating groups of up to 800 for clinics and meetings. The Mart officials boast that more lines are sold in the Apparel Mart than in any other building in the world. Buyers numbered 43,000 in 1972,[103] coming from 48 states and 10 foreign countries to meet with approximately 4,000 manufacturers' representatives and salesmen who serve the market.[104]

Buyers who come to Dallas, especially the ones from the smaller towns, look to the activities in the Mart as guidelines for their buying. An expert staff headed by Kim Dawson does fashion shows in the Great Hall and the Fashion Theater. "An amazing number of garments are presented on the runway with taste and flair and a commentary that educates the eye to line, texture and color."[105]

Many salesmen and manufacturers' representatives take advantage of the services offered by the American Fashion Association (AFA) whose offices are housed in the Apparel Mart. AFA operates along with the Apparel Mart Company to set market dates. The Association also provides Buyers' Guides for retailers and publishes the American Fashion Magazine with advertising of lines. In addition, the AFA protects the interests of salesmen through a retirement trust program and a Security Insurance program.[106]

In March of 1973, a new addition to the Mart was completed. The new wing adds 300,000 square feet and brings the total cost of the structure to just less than $21 million. It provided needed showrooms and lounge space, since the number of buyers increases each year.[107] Among the new additions are the Max-Wall, a giant wall of construction art by Paul Maxwell, a noted contemporary artist; and Group III, the name given the firms who show their garments in the third floor showrooms of the new wing.[108] Here are located the better ready-to-wear houses.[109]

October, 1974, was the date set for the opening of the Mart's newest feature. Labeled "The Territory," the new area provided 45 permanent showrooms exclusively for Western Wear manufacturers. Located on the 5th floor in the men's wear section are elaborately-decorated showrooms behind false fronts of weathered board and stucco. The area appears to be an old Western town, complete with hangin' tree and town square.[110]

Buyers participating in the Dallas market may attend any of the five women's and children's wear markets held annually: Midsummer market in January, Transitional market in March, Fall market in May, Midwinter market in August and Spring market in October. The fall and spring lines are most important, with the trend-setters being shown in the fall lines.[111]

The apparel market held in Dallas serves as the primary outlet for manufacturers in Southwestern United States. The Apparel Mart building is used by manufacturers from all over the United States for exhibition of their seasonal lines. For a summary of the significance, location and size of the Dallas market area see Table III.

TABLE III

DALLAS - WOMEN'S APPAREL MARKET

Summary of Factual Information
<u>Significance of Market</u> --Noted primarily for production of medium to popular-priced sportswear and dresses --Designing is largely adaptation of couture designs to meet consumer demand for moderate-priced goods --Manufacturing done largely by the inside shop method --Promotes apparel made in Southwest --Serves primarily retailers from central and southern parts of the United States, although exhibitors and buyers come from all states and a few foreign countries --Five women's and children's markets are held annually --Apparel Mart Structure noted for its size (1,300,000 square feet of permanent and temporary showroom space) and for its convenience (over 4,000 lines shown under one roof) --Area of Apparel Mart designated exclusively for showing of Western Wear <u>Location of Physical Facilities</u> --Part of Dallas Market Center Complex --Showrooms located in Apparel Mart, 2300 Stemmons Freeway <u>Size of Industry in Immediate Market Area</u> --Produces significant amount of women's wear; at least 1.4% of United States' sales --Number of firms producing women's coats, suits, blouses, dresses and sportswear - about 52 --Annual (1973) volume of these firms - $220,600

Secondary Market Centers

The following market centers are those currently being used by an increasing number of buyers annually. The significance of each market center, the amount of apparel produced in the surrounding geographical area and the present market facilities are presented.

Atlanta

Perhaps the fastest-growing center for display of fashion goods in the country is the market center located in Atlanta, Georgia. In the past, Atlanta has been known as a local market, serving retailers in the Southeast with moderate-priced apparel. Recently, however, the Atlanta Merchandise Mart has experimented with innovative methods for attracting greater numbers of buyers from greater distances and manufacturers in broader price ranges. One such plan was the cooperative effort of the Merchandise Mart and 100 exhibitors. Known as "Open Showroom Days," the intent was that buyers would have time to supplement their buying activities in the Mart during non-market months. This was not intended to overlap or interfere with the five market openings held annually.

Another experiment, a "Trend Show," is to be a part of each market showing. It will present American and European designer trends that affect the United States ready-to-wear market. The total look in fashion is reviewed, as well as such specifics as styling, color, fabric and coordinating accessories.[112]

The Atlanta apparel market is located in the twelve-year-old Atlanta Merchandise Mart. The Mart is a major part of Atlanta's Peachtree Center Complex. The Center is served by nearby hotel rooms, restaurants, cafeterias and public parking facilities.

The Merchandise Mart is the world's second largest merchandise mart, containing two million square feet and rising 22 stories. The building maintains permanent showrooms on 19 of the floors, a Trade Show Center, Fashion Theatre, meeting rooms and banquet hall.

Floors three through six are devoted to the apparel and textile industries. Apparel categories include couture, women's, men's, boy's, children's wear and accessory lines.

Miami

The apparel industry in and around Miami, Florida, is responsible for .8 percent of the production of women's, misses', juniors' and children's wear in the United States.[113] The apparel industry is the fourth largest industry in the state of Florida.[114] The primary classifications of merchandise produced and shown are swimwear and resort wear.

The showing of merchandise has recently become centrally located in the Miami Merchandise Mart. Easily accessible by car and close to hotels, the Mart contains 550 showrooms in 432,000 square feet. Apparel, gifts, and decorative accessories are shown there.[115]

The market at Miami serves retailers in the South, from nearby islands and from Latin America.

Chicago

Chicago has been known for many years as a wholesale center for merchandise in the mid-west. Some 800 apparel firms making infants', children's and women's apparel maintain showrooms in the Chicago Merchandise Mart.[116]

In 1973 work was begun on an Apparel Center Complex that is to be completed in 1976. Several floors will be occupied by better ready-to-wear houses. The Fashion Creators of New York have reserved an entire floor and plan to offer showings 52 weeks a year. The building is being built by developers of the Chicago Merchandise Mart.

Kansas City

Medium to low-priced dresses, work clothes and boys' wear have been the specialization of the market at Kansas City. About one percent of the women's and children's apparel in the United States is produced in the state of Kansas.[117]

The New Kansas City Trade Mart is actually the old Kansas City Air Terminal, re-designed and remodeled into an exhibition center and wholesale apparel mart. It offers an easily-accessible location, ample parking, 100,000 square feet of exhibition space and 40,000 square feet of space for permanent showrooms.[118]

Additional Market Centers

Several other market centers traditionally listed as significant market centers for women's apparel in the United States are St. Louis (junior wear), Boston (rainwear) and Philadelphia (millinery).[119] Recent literature and trade publications, however, give little information about the current status of these market cities.

Summary

In the apparel industry in the United States, three cities stand out as major centers for production and display of women's, misses' and junior apparel. These are New York, Los Angeles and Dallas.

New York, historically the fashion center of the United States, remains the major center for apparel design and innovation. A greater variety of apparel and accessories may be viewed during market openings in New York than in any other city. The Garment District, located primarily along Seventh Avenue in Manhattan, is the center for the fashion industry in New York.

Los Angeles serves the West Coast and much of the nation as an outlet for swimwear and sportswear. Innovative trends in apparel are seen in the designs of California manufacturers. Merchandise is shown in the California Mart in downtown Los Angeles. The facility is open 52 weeks of the year.

Dallas, long known as a center for sportswear and low to medium-priced dresses, has grown rapidly in both the production as well as the display of apparel within the past ten years. Much of this growth can be attributed to the convenience of the Apparel Mart building. There are five seasonal showings of women's, misses' and junior apparel in the Apparel Mart each year.

Other centers of production and display are Atlanta, Miami, Chicago, Kansas City, St. Louis, Boston and Philadelphia.

Characteristics of apparel manufacturers and their use of markets are presented in the following chapter.

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CHAPTER V

MANUFACTURERS AND MARKETS

This chapter presents the research findings related to inquiries about the characteristics of apparel manufacturers and the markets used in the distribution of their goods. Also included is a comparison of regional markets. The findings presented in this chapter are related to Objectives II and III.

The responses to the questionnaire (outlined in Chapter III) were grouped into the following categories: Sample Information, Status of Firm, Size of Firm, Nature of Merchandise, Showroom Locations and Types of Retailers Served. The comparison of regional markets in terms of certain characteristics of manufacturers who use them was presented as the final part of this chapter.

Sample Information

Of a total of 291 questionnaires mailed, 57 (19.3%) were returned by an authorized person. Names of firms returning the form are indicated on the original sample list in Appendix C. In addition to the 57, nine were returned by the United States Postal Service, indicating on the envelope that the occupant had moved and mail was not forwardable. Two persons returning the questionnaires noted that the manufacturers were no longer in business. The number returned by the post office and the number known to be out of business may be indicative of the high turnover and failure rate in the apparel business. Business Week lists the rate of failure to be 4 to 5 percent of the total companies in business each year.[1] Jarnow gives a much higher rate for business turnover in the apparel industry. Including discontinuances and transfers, as well as failures, the rate of turnover is about 18 percent a year under normal conditions.[2]

Of the 57 questionnaires returned, 46 (14.7%) were found to be usable in the study as shown in Table IV. Six firms indicated that they were contract manufacturers. These firms specialize in the sewing of garments by contract for another apparel manufacturer. Because of the nature of the contracting business, these firms were unable to respond to some questions. When this was a factor, it was so designated in the proper table.

TABLE IV

SAMPLE INFORMATION: QUESTIONNAIRES SENT, RETURNED, ELIMINATED AND USABLE

Category	Number
Total questionnaires sent	291
Total questionnaires returned	57
Questionnaires eliminated	11
Special categories	2
Mfg. men's only	4
children's only	1
No longer in business	2
No longer manufacturing ladies'	2
Questionnaires usable	46

Two of the 57 questionnaires were eliminated because the manufacturers produced special categories of apparel the same as those eliminated in determining the original sample. These categories were burial garments and wedding gowns. Other questionnaires eliminated were four returned by men's wear manufacturers, one children's wear manufacturer and two manufacturers who no longer manufactured ladies' apparel. Two other firms had gone out of business.

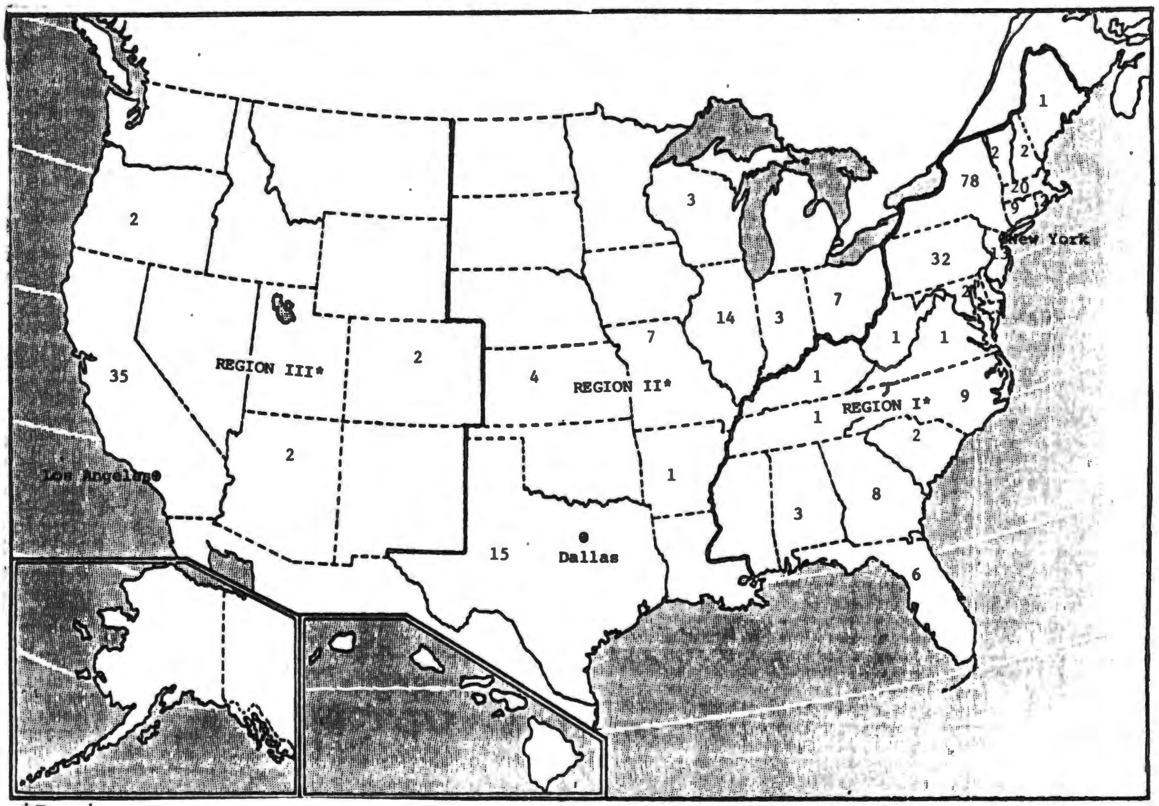
Status of Firms

The initial items on the questionnaire requested general information about the firm, including location, age and size of the firm. Several were returned with no name or identification.

Location of Firms

The location by region of the firms returning the questionnaires is indicated by Table V. In Region I, Eastern States, 29 were returned and 22 were usable (11.2%). In Region II, Central States, a total of 13 forms were returned; however, only 11 were usable (19.2%). A total of 15 questionnaires were returned in Region III, Western States, and 13 were usable (22.7%). The address given on the returned form was used for the purpose of determining geographical location.

Figure 4 shows the three regional areas associated with the three major market centers as discussed in Chapter III. Also indicated are the number of firms included in the sample, by states and by region, according to Poor's Register.



*Region I - Eastern United States - 196 questionnaires sent
*Region II - Central United States - 53 questionnaires sent
*Region III - Western United States - 42 questionnaires sent

Figure 4. Geographical Location of Apparel Manufacturing Firms by Region

TABLE V

QUESTIONNAIRES RETURNED: GEOGRAPHICAL LOCATION BY REGION

Region	Number Sent	Number Returned	Percent of Total Sent	Number Usable	Percent of Total Sent
I - East	196	29	17.8%	22	11.2%
II - Central	53	13	22.7%	11	19.2%
III - West	42	15	26.2%	13	22.7%

<u>Age of Firms</u>

Respondents were asked to indicate the number of years that the firm had been in operation. As shown in Table VI, only one of the 46 had been in operation less than five years (2.1%). Likewise, only one firm representative indicated that his organization had been in business for more than 100 years (2.1%). The greatest number of firms had been in operation 26 - 50 years (41.3%).

Size of Firms

Respondents were asked to indicate the size of their firm in terms of annual dollar volume, number of manufacturing divisions and number of sales representatives.

TABLE VI

YEARS FIRM HAS BEEN IN OPERATION

Operation	Number of Respondents	Percent of Total
0 - 5 years	1	2.1
6 - 25 years	14	30.4
26 - 50 years	19	41.3
51 - 100 years	9	19.5
101 - 150 years	1	2.1
No Response	2	4.3

N = 46

Annual Dollar Volume

As shown in Table VII, the largest percent of responding firms was in the smaller ranges of dollar volume. More than fifty percent of the responding firms had volumes under $4 million. The largest percent (43.4%) did between $1 - 4 million of business annually. It should be noted that those indicating the range of over $100 million was the same as those in the $10 - 24 million category (8.7%).

The number of firms with a total dollar volume under $1 million (13%) and $1 - 4 million (43.4%) is supportive of a statement by Jarnow: "In every major branch of the industry, close to half the manufacturers and jobbers have individual sales volumes of under $1 million."[3]

Number of Manufacturing Divisions

Apparel manufacturers were also asked to indicate the number of manufacturing divisions in the firm. As shown in Table VIII, more than

TABLE VII

SIZE OF FIRMS BY ANNUAL DOLLAR VOLUME

Annual Dollar Volume	Number of Respondents	Percent of Total
Under $1 million	6	13.0
$1 - 4 million	20	43.4
$5 - 9 million	6	13.0
$10 - 24 million	4	8.7
$25 - 49 million	2	4.3
$50 - 100 million	2	4.3
Over $100 million	4	8.7
No Response	2	4.3

N = 46

TABLE VIII

NUMBER OF MANUFACTURING DIVISIONS REPORTED BY APPAREL FIRMS

Number of Divisions	Number of Respondents	Percent of Total
One manufacturing division	24	52.1
Two manufacturing divisions	10	21.7
Three manufacturing divisions	6	13.0
Four manufacturing divisions	0	-
Five manufacturing divisions	2	4.3
More than five	3	6.5
No response	1	2.1

N = 46

half of the firms (52.1%) had only one manufacturing division. Thirty-four percent had two or three divisions. Only five firms (4.3%) had five or more divisions.

The large number of firms having only one manufacturing division would seem to support the idea that the apparel business remains the stronghold of small operators. Both Business Week and the recent text by Jarnow noted that in the apparel business the small manufacturer has an equal chance against the large companies. Both exist side by side in the apparel industry.[4, 5]

Number of Sales Representatives

The apparel manufacturers were asked to indicate the number of sales representatives employed by their firm. As can be seen in Table IX, most firms in this survey had fewer than 20 sales representatives (65.1%). Six firms (13.0%) had no sales representatives. This number included contract manufacturers who do not usually employ sales representatives. Only four firms (8.7%) maintained a sales staff of more than 100 representatives.

The survey asked manufacturers if their representatives carried any lines other than the ones made by their firm. About one-third of the firms indicated that their salesmen carried other lines (30.4%); while nearly one-half indicated that their salesmen carried only lines manufactured by their firm (47.8%). About one-fourth of the firms did not respond to the question (21.7%).

Nature of Merchandise Produced

Several questions on the survey dealt with the types of merchandise produced. Questions pertained to the production of goods by divisions, the production of ladies' apparel by classification, price ranges of apparel by classification and the types of ladies' apparel produced.

TABLE IX

NUMBER OF SALES REPRESENTATIVES REPORTED BY APPAREL FIRMS

Number of Sales Representatives	Respondents	Percent of Total
0 representatives	6*	13.0
1 - 5 representatives	11	23.9
6 - 20 representatives	13	28.2
21 - 50 representatives	4	8.7
51 - 100 representatives	1	2.1
100+ representatives	4	8.7
No response	7*	15.2

N = 46
*Includes contract manufacturers

Production by Manufacturing Division

When asked how they designated each manufacturing division, the majority of manufacturers noted that they produced ladies' apparel alone. As indicated in Table X, 34 of the firms (73.9%) produced ladies' apparel only; however, some firms produced merchandise other than ladies' apparel. Six firms (13%) combined production of ladies' and men's apparel. Only one firm (2.1%) produced three categories of merchandise--ladies', men's and children's wear.

Although this study was designed to survey manufacturers of ladies' apparel, the responses to this question were interesting when considered in light of the Jarnow and Business Week sources. Jarnow supports the idea that there is a high degree of specialization in the apparel industry.[6] Recently, however, Business Week reported that many companies are diversifying across several market segments, even combining men's and women's wear.[7]

TABLE X

PRODUCTION BY MANUFACTURING DIVISION REPORTED BY FIRMS

Manufacturing Division	Number of Respondents	Percent of Total
Ladies' division only	34	73.9
Ladies' and men's divisions	6	13.0
Ladies' and children's divisions	1	2.1
Ladies', men's and children's divisions	1	2.1
No Response	4	8.7

N = 46

Additional study of the data indicated that, of those firms producing both ladies' and men's wear, three firms devoted only 10 percent to women's apparel production, two devoted only 10 percent to men's apparel production, while one firm produced 50 percent in each category. The firm which produced a combination of ladies' and children's wear noted that only 10 percent of their production was devoted to the children's wear segment. The firm producing all three categories of merchandise reported that only 5 percent of total production was devoted to children's wear and 30 percent to the men's division. Sixty-five percent of this firm's production was devoted to the manufacturing of ladies' apparel.

Production of Ladies' Apparel by Classification of Merchandise

Manufacturers were asked to indicate the classification of ladies' apparel produced. Three choices were given: Junior Apparel (those garments designed for young women 15 - 30 and sized 3, 5, 7, etc.); Misses' Apparel (garments designed for the mature figure and sized 6, 8, 10, etc.); and Women's Apparel (large and half sizes). Firms were asked to list other classifications.

The responses were coded and tallied. The data are presented in Table XI. It was found that some manufacturers produced a combination of the three classifications listed above while some produced only one classification. Five firms (10.9%) produced only Junior lines of apparel. This is compared with 12 firms (26.1%) producing only Misses' lines. No firms in this survey produced only large and half sizes. Some firms combined production of two of these categories, but only seven firms (15.2%) combined all three classifications in production. Several of those who chose not to respond to this question noted that this information was confidential.

Two other classifications were listed by manufacturers. These two categories were "tall" (clothes for the woman 5'8" and over) and "contemporary" (a young, career-girl look).

TABLE XI

PRODUCTION OF LADIES' APPAREL BY CLASSIFICATION OF MERCHANDISE REPORTED BY FIRMS

Classifications of Merchandise Produced	Number of Responses	Percent of Total
Junior only	5	10.9
Misses' only	12	26.1
Women's only	0	-
Junior and Misses'	1	13.0
Junior and Women's	1	2.1
Misses' and Women's	8	17.2
All three classifications	7	15.2
No response	7	15.2

N = 46

Respondents were asked to estimate the percent of total production devoted to each classification. Ten manufacturers chose not to respond to this inquiry. The total production of five firms (10.9%) was in Junior wear. Twelve firms (26.1%) manufactured only Misses' wear. The production of other firms was divided in a variety of ways between the three classifications: Junior, Misses' and Women's wear.

Price Ranges of Apparel by Classification

Manufacturers were asked to check each retail price category listed on the questionnaire which represented the prices of apparel they manufactured. Most manufacturers made apparel concentrated in the same general price ranges. These price ranges are shown in Table XII. Firms manufacturing Junior wear were concentrated in the $6 - $55 price range. The largest number of firms making Misses' wear were also in the $6 - $55 price ranges. In Women's classifications, more firms manufactured apparel in the $6 - $35 range. Some Misses' and Women's firms indicated that they made apparel in categories from $56 - $200 and over.

TABLE XII

PRICE RANGES OF APPAREL BY CLASSIFICATION REPORTED BY FIRMS

Price Ranges of Products	Firms Producing Junior Apparel	Firms Producing Misses' Apparel	Firms Producing Women's Apparel
$0 - 5	1	1	1
$6 - 15	11	15	7
$16 - 25	13	18	6
$26 - 35	12	14	5
$36 - 45	9	12	3
$46 - 55	7	11	3
$56 - 65	1	5	1
$66 - 75	1	3	2
$76 - 85	0	2	2
$86 - 95	0	2	2
$96 - 100	0	2	2
$100 - Up	0	2	2
$200 - Up	0	1	0

Items of Ladies' Apparel Produced

Manufacturers were asked to check the types of apparel most descriptive of the ladies' apparel they manufactured. Items listed included: tops, skirts, jeans, slacks, jackets, coats, suits, pant suits, long dresses and/or short dresses. Additional blanks were provided for other types of merchandise to be listed. Other types of ladies' apparel listed by one or two manufacturers were: sweaters, shorts, pant coats, sleepwear, walking shorts, ski wear and tennis wear.

The responses are presented in Table XIII. Suits, coats and jeans were produced by the fewest firms. Dresses, pant suits, slacks, skirts and tops were produced by a majority of manufacturers.

TABLE XIII

TYPES OF MERCHANDISE PRODUCED BY APPAREL MANUFACTURERS

Types of Merchandise	Number of Responses	Percent of Total
Tops	19	41.3
Skirts	20	43.4
Jeans	5	10.9
Slacks	20	43.4
Jackets	17	37.0
Coats	5	10.9
Suits	4	8.7
Pant Suits	20	43.4
Long Dresses	16	34.7
Short Dresses	18	39.1
No Response	6	13.0

When analyzing the data, it was noted that most firms combined production of various types of apparel. The number of firms producing several types of apparel was concentrated in the area of five or fewer types of apparel.

Showroom Location

Several items of information were requested with reference to the manufacturers' use of fashion markets in the United States. Inquiries were made about permanent showroom location and temporary location.

Permanent Showrooms

First, manufacturers were asked the location of permanent showrooms in the three designated markets (New York, Los Angeles and Dallas). As shown in Table XIV, the largest number of firms (63%) listed permanent showrooms in New York. Fewer listed permanent showrooms in Los Angeles (41.3%) and Dallas (39.1%).

Twenty firms (43.4%) listed permanent showrooms in other market cities. Manufacturers listed other permanent showrooms in Atlanta, Chicago, Miami, Charlotte, San Francisco, Kansas City, St. Louis, Seattle, Portland, Cleveland, Boston, Baltimore, Philadelphia, Honolulu, Indianapolis, Denver and Weathersfield, Connecticut.

These responses were analyzed to see what combinations of market locations were used by these firms. Ten firms (21.7%) maintained permanent showrooms only in New York City. This was a much greater

TABLE XIV

PERMANENT SHOWROOM LOCATIONS LISTED BY MANUFACTURERS

Market City	Number of Responses	Percent of Total
New York	29	63.0
Los Angeles	19	41.3
Dallas	18	39.1
Other Permanent Showrooms	20	43.4
Atlanta	8	
Chicago	7	
Miami	5	
Charlotte, N. C.	5	
San Francisco	4	
Kansas City	2	
St. Louis	1	
Seattle	1	
Portland	1	
Cleveland	1	
Boston	1	
Baltimore	1	
Philadelphia	1	
Honolulu	1	
Indianapolis	1	
Denver	1	
Weathersfield, Conn.	1	

N = 46

number than those having permanent showroom locations exclusively in Los Angeles or Dallas. Fourteen firms (32.6%) had permanent showrooms in all three selected market cities.

Temporary Showrooms

Results of the inquiry about temporary showrooms are shown in Table XV. Temporary showrooms were listed by 13 firms (28.2%), while

17 firms (37%) listed no temporary showrooms and 16 firms (34.7%) did not respond to the question about temporary showrooms.

TABLE XV

TEMPORARY SHOWROOMS MAINTAINED BY MANUFACTURERS

Response	Number of Respondents	Percent of Total
Do maintain a temporary showroom	13	28.2
Do not maintain a temporary showroom	17	37.0
No response	16	34.7

N = 46

The locations of temporary showrooms most frequently mentioned are as follows: Dallas; Denver; San Francisco; Charlotte, N. C.; Atlanta; Birmingham; Chicago; Little Rock; Miami; Portland; New York; Memphis; Minneapolis; Omaha; Billings; Knoxville; Houston; Nashville; Detroit and New Orleans.

Types of Retail Stores Served

In order to obtain information about the types of retail stores served by apparel manufacturers, respondents were asked to check each category of retailers to whom their goods were sold. Three groups of retail establishments were listed. Group I included Boutiques, Specialty Shops and Junior Department Stores. Group II listed Multi-Unit Department Stores, Chain Stores and Mail Order Houses. Group III was defined as Discount Chains and Variety Stores. No other types of retail stores were noted by manufacturers.

Thirty-four firms (73.9%) indicated that they sold their goods to the types of stores listed in Group I. Thirty-one firms (67.3%) indicated that their products were sold to one of Group II types of retail establishments. Six firms did not respond to the question. This number included contract manufacturers who do not sell directly to retailers. Six firms (13%) sold goods to stores as defined in Group III. See Table XVI for data about types of retail stores serviced by manufacturers participating in this study.

TABLE XVI

TYPES OF RETAIL STORES SERVED BY APPAREL MANUFACTURERS

Group	Number of Firms Responding	Percent of Total
I - Boutiques, Specialty Shops and Jr. Department Stores	34	73.9
II - Multi-Unit Department Stores, Chain Stores and Mail Order Houses	31	67.3
III - Discount Chains and Variety Stores	6	13.0
Other Types of Stores	0	-
No Response	6*	13.0

N = 46
*Includes contract manufacturers

For further analysis, combinations of Groups I, II and III were noted. The largest numbers of firms (45.6%) sold goods to retail stores listed in Groups I and II. Only three firms served Group II, Multi-Unit Department Stores, Chain Stores and Mail Order Houses as well as Group III, Discount Chains and Variety Stores. Three firms in this study made goods for retailers in all three groups. Nine firms (19.5%) specialized in making goods for stores in Group I only, four firms (8.7%) made goods for retailers in Group II only and no firms made goods for stores in Group III only.

Characteristics of Apparel Manufacturers

Based on the findings of this survey, 20 characteristics of apparel manufacturers were identified and the following summary statements were formulated:

STATUS OF FIRM

(1) Location: Most firms (22) in this study were located in states in Region I (Eastern United States). Fewer firms (11) were located in Region II (Central United States) and slightly more (13) in Region III (Western United States).

(2) Age: Most firms in this study (73.8%) had been in business less than 50 years.

SIZE OF FIRM

(3) Annual Dollar Volume: Most firms in this study (56.4% reported an annual dollar volume of business under $4 million.

(4) Number of Manufacturing Divisions: Most firms in this study (52.1%) listed only one manufacturing division.

(5) Number of Sales Representatives: Most firms in this study (52.1%) maintained a staff of from one to twenty sales representatives.

NATURE OF MERCHANDISE PRODUCED BY FIRMS

(6) Ladies' Wear: Most firms in this study (73.9%) produced only ladies' apparel.

(7) Men's Wear: A smaller percentage of the firms (27.2%) produced some men's wear.

(8) Children's Wear: An even smaller percentage (2.1%) produced children's wear.

(9, 10, 11) Junior, Misses' and Women's Classifications: Firms combined production of junior, misses' and women's apparel in a variety of ways. No firm produced only women's apparel.

(12) Items of Apparel Produced: Firms in this study combined production of five or fewer items of apparel.

SHOWROOM LOCATION

(13, 14, 15) Permanent Showroom Use: More firms in this study (63%) maintained permanent showrooms in New York than in either Los Angeles (41.3%) or Dallas (37.1%).

(16) Other Permanent Showrooms: A substantial number of firms (43.4%) listed permanent showrooms in cities other than New York, Los Angeles and Dallas.

(17) Temporary Showroom Use: More firms (37%) did not maintain a temporary showroom than did (28.2%).

RETAIL STORES SERVED BY FIRMS

(18) Group I: Most firms in this study produced merchandise sold in Boutiques, Specialty Shops and Junior Department Stores (73.9%).

(19) Group II: Some manufacturers served Multi-Unit Department Stores, Chain Stores and Mail Order Houses (67.3%).

(20) Group III: Fewer firms (13%) served Discount and Variety Stores.

Comparison of Fashion Markets with Selected Characteristics of Apparel Manufacturers

The designated characteristics of apparel manufacturers were considered in relation to the use of permanent showrooms in New York, Los Angeles and Dallas. These 20 characteristics were grouped into two categories and the appropriate statistical analysis was made. This procedure was discussed in Chapter III. The statistical relationships for both categories appear in Appendix F. Relationships which proved to have significance at the .05 and .01 levels are presented in Table XVII.

The findings indicated that there were strong relationships between nine characteristics of apparel manufacturers and the use of permanent showrooms in the three market areas. Based on the responses of manufacturers participating in this study, the following statements can be made about these significant relationships:

TABLE XVII

RELATIONSHIPS BETWEEN MANUFACTURER CHARACTERISTICS AND PERMANENT SHOWROOM LOCATIONS AT CRITICAL LEVELS OF SIGNIFICANCE*

Characteristic	Permanent Showroom New York	Permanent Showroom L. A.	Permanent Showroom Dallas
Status of Firm			
Geographical location (Region II)	--	--	.05
Size of Firm			
Size by annual dollar volume	NS	.01	.01
Size by number of manufacturing divisions	NS	.05	.01
Size by number of sales representatives	.01	.01	.01
Showroom Location			
Use of permanent showroom in New York	--	.05	.05
Use of permanent showroom in Los Angeles	.05	--	.05
Use of permanent showroom in Dallas	.05	.01	--
Use of other permanent showrooms	NS	.05	.05
Types of Retail Stores Serviced			
Group I (Boutiques, Specialty Shops and Junior Department Stores)	NS	.05	.05

*Significant at .05 level or .01 level
NS = not significant
N = varies from 30 - 45 to allow for those manufacturers who did not respond to a particular question

Status of Firm

There was a significant relationship at the .05 level between the location of firms in Region II (Central United States) and the use of permanent showrooms in Dallas ($x^2 = 12.76$). This indicates that firms in Region II tended to use permanent showrooms in Dallas.

Size of Firm

The correlation coefficients for permanent showroom locations in Los Angeles ($\phi = .49$) and Dallas ($\phi = .49$) and the size of firms by annual dollar volume proved to have significance at the .01 level. Thus, the probability that a firm maintains a permanent showroom in Los Angeles and Dallas is greater as the size of the firm increases by annual dollar volume. There appeared to be no significant relationship between the location of a permanent showroom in New York ($\phi = .27$) and the size of firm by annual dollar volume.

The size of the firm by number of manufacturing divisions was related to the use of a permanent showroom in Los Angeles ($\phi = .37$) at the .05 level of significance and in Dallas ($\phi = .45$) at the .01 level of significance. These correlations suggest that firms with several manufacturing divisions tended to maintain a permanent showroom in Los Angeles. The tendency to maintain a showroom in Dallas was even stronger as the number of manufacturing divisions within a firm increased. The size of the firm by number of manufacturing divisions was not significantly related to the use of a permanent showroom in New York ($\phi = .27$).

The size of firm by number of sales representatives correlated at the .01 level with the use of permanent showrooms in New York ($\phi = .47$), Los Angeles ($\phi = .54$) and Dallas ($\phi = .61$). The larger the number of sales representatives employed by a firm, the greater the probability that a firm will maintain a showroom in each of the three regional markets.

Showroom Location

The use of a permanent showroom in New York was significantly related at the .05 level to the use of a permanent showroom in Los Angeles ($x^2 = 3.94$) and Dallas ($x^2 = 3.94$). The use of a permanent showroom in Los Angeles was significantly related at the .01 level of significance to the location of a showroom in Dallas ($x^2 = 17.95$). Based on these relationships, firms maintaining permanent showrooms in Los Angeles and Dallas tended to have a permanent New York showroom. Firms using Dallas on a permanent basis tended to have a permanent showroom in Los Angeles.

The association was significant at the .01 level between a firm's maintenance of a permanent showroom in locations other than in the three regional market centers designated in this study and the firm's use of a permanent showroom location in Los Angeles ($x^2 = .54$) and Dallas ($x^2 = .58$). The probability that a firm will maintain a permanent showroom in market centers other than New York, Los Angeles and Dallas is greater if the firm maintains a permanent showroom in Los Angeles and Dallas. The location of a permanent showroom in New York was not significantly associated with the location of permanent showrooms in other market centers.

Types of Retail Stores Served

The relationship was significant at the .05 level between apparel firms serving types of stores included in Group I and the location of a permanent showroom in Los Angeles ($x^2 = 3.75$) and Dallas ($x^2 = 3.75$). This suggests that firms serving Boutiques, Specialty Stores and Junior Department Stores tended to have permanent showrooms in Los Angeles and Dallas. There did not appear to be a relationship between firms serving Group I retailers ($\phi = 6.46$) and a permanent showroom location in New York.

Comparison of Markets

The comparison of fashion markets in New York, Los Angeles and Dallas was the final objective of the study. The research indicated that these regional markets differ in terms of certain characteristics of the apparel manufacturers who use them.

New York Market Center

The New York market tended to be used by apparel manufacturers with the following characteristics:

(1) Firms employing larger numbers of sales representatives.

(2) Firms using permanent showrooms in Los Angeles and Dallas.

It appeared that firms tended to maintain New York showrooms regardless of the geographical location, the size by dollar volume, the size by number of manufacturing divisions, the use of permanent showrooms in other market locations and the types of retailers served.

Los Angeles Market Center

The Los Angeles market tended to be used by apparel manufacturers with the following characteristics:

(1) Firms having larger annual dollar volumes, larger number of manufacturing divisions and larger number of sales representatives.

(2) Firms having permanent showrooms in New York, in Dallas and in other market locations.

(3) Firms serving types of stores included in Group I (Boutiques, Specialty Shops and Jr. Department Stores).

It appeared that firms tended to maintain a Los Angeles showroom regardless of whether they were located in Region III (Western United States) or in either of the other two regions.

Dallas Market Center

The Dallas market tended to be used by apparel manufacturers with the following characteristics:

(1) Firms located in Region II (Central United States).

(2) Firms with larger annual dollar volumes, larger numbers of manufacturing divisions and larger numbers of sales representatives.

(3) Firms using New York, Los Angeles and other permanent showroom locations.

(4) Firms manufacturing goods sold to stores represented in Group I (Boutiques, Specialty Shops and Jr. Department Stores)

This concludes the comparison of markets in terms of characteristics of apparel manufacturers identified by this study. These statements suggest the uniqueness of each of these three market centers.

Summary

The responses of 46 manufacturers of ladies' apparel were reported in this chapter. Responses were reported in categories pertaining to firm information, types of merchandise produced and market centers used. Responses were then discussed and presented in table form. Characteristics of apparel manufacturers in this study were summarized.

Certain characteristics of apparel manufacturers were compared with the use of a permanent showroom in New York, Los Angeles and Dallas. Appropriate statistical tests were used for analysis. Relationships for the apparel manufacturers' characteristics and permanent showroom locations were considered for significance at the .05 and .01 levels. A table of the relationships was presented and discussed. Finally, a comparison was made of each of the three regional markets--New York, Los Angeles and Dallas--in terms of the characteristics of the firms producing ladies' apparel in this study.

The following chapter contains a summary of the study, conclusions from the findings reported in the three previous chapters and recommendations for further study.

FOOTNOTES

[1]"The Garment Trade Learns Sophisticated Selling," Business Week (September 23, 1973), p. 84.

[2]Jeannette A. Jarnow and Beatrice Judelle, Inside the Fashion Business (New York, 1974), p. 116.

[3]Ibid., p. 11.

[4]Ibid.

[5]"The Garment Trade Learns Sophisticated Selling," p. 85.

[6]Jarnow (1974), p. 114.

[7]"The Garment Trade Learns Sophisticated Selling," p. 85.

CHAPTER VI

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

The purpose of the study was to describe selected fashion markets in the United States and to investigate the use of markets by apparel manufacturers. The nature of the women's apparel industry in America was considered in relation to the role of market centers in the distribution of fashion goods. The investigator examined the history, the growth and development and the present status of selected fashion markets (New York, Los Angeles and Dallas). Information was obtained pertaining to status of firm, size of firm, types of merchandise manufactured, markets used and retailers served by producers of ladies' apparel in the United States.

Summary

The objectives of this study were accomplished through library research and letters of inquiry. A four-page questionnaire was used to obtain descriptive data from a representative group of manufacturers of ladies' apparel.

New York, Los Angeles and Dallas were the market cities selected for in-depth study. Historical aspects, factors contributing to the growth, present location and current significance of the respective market cities were included in this presentation. Brief summaries of other prominent market cities were also reported.

Two hundred and ninety-one questionnaires were mailed to a sample of women's apparel manufacturers selected from Poor's Register of Corporations, Directors and Executives. Only manufacturers of women's outerwear were included in this study. Of the 291 questionnaires, 57 (19%) were returned and 46 were included in the findings of the study. Results of the questionnaire were recorded and computer analyzed, the data was studied and the findings were reported in this research.

Conclusions

As a result of the investigation conducted for this study, the following statements can be made about the selected major market centers:

(1) The fashion market centered in New York City remains the nation's largest ready-to-wear center. More than 60 percent of the country's apparel is designed, produced and marketed in the New York City area.

(2) Concentrated in the city of Los Angeles is another fashion market of national importance. The basis of this market is considered to be sportswear and swimwear, although apparel in a wide variety of classifications and price ranges is being produced and exhibited in Los Angeles. The development of the California Mart center has greatly benefited the apparel industry in the Los Angeles area.

(3) The market held in Dallas, Texas, can also be considered national in scope. The Apparel Mart is the primary outlet for a growing number of manufacturers in Texas and the Southwest. However, the market serves manufacturers and retailers from all

states. The volume of business is done in popular-priced apparel and sportswear.

Based on the findings of this research, the following statements can be made about the apparel manufacturers in this study:

(1) A majority of present apparel manufacturers began operation in the 1920's or later.

(2) Approximately half of these apparel manufacturers could be considered small operations. They reported annual volumes of under $4 million, listed only one manufacturing division and employed fewer than 20 sales representatives.

(3) More apparel manufacturers tend to maintain permanent showrooms in New York than in Los Angeles and/or Dallas.

(4) More apparel manufacturers tend to produce apparel for specialty stores and multi-unit retail organizations than for discount and variety stores.

This research indicated that the following statements can be made in comparing the designated regional markets:

(1) New York, Los Angeles and Dallas markets were used by firms employing larger numbers of sales representatives. This was the single manufacturer characteristic which was related to the use of all three market areas.

(2) New York, Los Angeles and Dallas markets were used for permanent showrooms by a majority of apparel manufacturers.

(3) Los Angeles and Dallas markets were used primarily by larger firms as determined by annual dollar volume and number of manufacturing divisions.

(4) Los Angeles and Dallas markets served primarily boutiques, specialty shops and junior department stores.

(5) The Dallas market was used primarily by firms located in Region II (Central United States).

Recommendations

Recommendations stemming from this research will be dealt with in three categories: recommendations for similar studies; recommendations for further study suggested by the findings of this research; and recommendations for research in fields related to the present study.

Suggestions for improving exploratory studies similar to the present study include:

(1) Design the study to utilize source for selection of the sample other than Poor's Register. Names and addresses of manufacturing firms having membership in such associations as American Apparel Manufacturers' Association might be obtained.

(2) Utilize a random sampling technique to limit the number of manufacturers chosen initially. This could prove helpful in terms of follow-up procedures and would, perhaps, increase the percent of returns.

(3) Design the study on the basis of specific hypotheses and collect ordinal data to be statistically analyzed.

This exploratory study provides some descriptive information about the women's apparel industry and suggests further study of this nature. Some specific suggestions are:

(1) Investigation of the degree of specialization or diversification in types, classifications, size ranges and price ranges of apparel produced. Such research might provide a better understanding of the degree of homogeneity of products within the apparel industry.

(2) A detailed study of the services provided for manufacturers in local, regional and national markets.

The results of this study suggest that similar research might be feasible for fields related to the women's apparel industry. Possibilities include:

(1) An exploratory study of the characteristics of manufacturers of men's and boy's wear and their use of market centers.

(2) An investigation of the marketing process for other industries such as home furnishings.

(3) A study of the use of fashion markets by various types of retail stores.

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APPENDIX A

SUGGESTED CLASSIFICATIONS FOR USE IN COLLECTING DATA ABOUT FASHION MARKET AREAS

1. Early Beginnings - Dates of Importance

--economic environment surrounding the development

--organizations supporting growth

--manufacturers of note

--specialization in merchandise manufactured

--method of manufacturing used

--price ranges and quality of merchandise manufactured

--textiles utilized

--location in the area

2. Present Market - Physical Locations

--dates present factories were founded

--size of present industry (number of firms, number of workers)

--composition of the market

--location of present market

--recent growth and future plans

--unique feature of present market

--merchandise classification

3. Present Market System - Operational Activities

--number of markets each year, dates

--number of manufacturers exhibiting

--number of retail buyers present and store locations

--activities of market

--services offered to buyers

--price lines of merchandise exhibited

--type of merchandise exhibited

--current problems

--future growth speculation

APPENDIX B

VERIFICATION INQUIRIES

October 3, 1974

Dear

Your assistance is being sought in the completion of a study concerning apparel markets in the United States. We would appreciate your thoughts and opinions on the present status of the apparel industry in your area.

Enclosed is a summary of the current status of the women's apparel market in your area according to factual information we have been able to collect. Please read the summary and add any current sources of information, any comments you could make concerning the present market status, and any suggestions you may have on reporting the status. A self-addressed, stamped envelope is included for rapid return.

This information will become part of a master's thesis now being completed at Oklahoma State University. Also, enclosed is a list of sources for the information included in the summary.

Do you know of another person in your city that would be particularly knowledgeable about the market in your area? If so, would you please include his name so that we may ask for his opinion.

Thank you for your time and cooperation.

Sincerely,

Anne Scott
#24 Preston Circle
Stillwater, Oklahoma 74074

____

Additional Name

____

Address

____

PERSONS CONTACTED FOR VERIFICATION OF MARKET SUMMARIES

NEW YORK

Mr. Felix Lillienthal
417 5th Avenue
New York, New York

Carolyn Carpentieri Potter
Editor-in-Chief
Clothes Magazine
380 Madison Avenue
New York, New York 10017

CALIFORNIA

Marjorie H. Carne
Executive Vice President
California Fashion Creators
110 E. 9th Street
Los Angeles, California 90015

Bernard Z. Brown, President
California Fashion Creators
110 E. 9th Street
Los Angeles, California 90015

Frank Dillon, Manager
California Mart
110 East 9th Street
Los Angeles, California 90015

DALLAS

Bob Newhouse
Fame Fashions Division, Mr. Fine
Regal Row at Stemmons Freeway
Dallas, Texas

Loren Feldman
Southwestern Apparel Manufacturers Assoc.
Rm. 59350 Apparel Mart
2300 Stemmons Freeway
Dallas, Texas

Barbara Klindworth, Fashion Coordinator
Kim Dawson Agency
Apparel Mart
2300 Stemmons Freeway
Dallas, Texas

NEW YORK AREA - WOMEN'S APPAREL MARKET

PRESENT STATUS

SUMMARY OF FACTUAL INFORMATION	PLEASE NOTE ADDITIONAL FACTS, COMMENTS, OR SUGGESTIONS
SIGNIFICANCE OF MARKET: --Historically considered the fashion capital of the United States --Considered the world capital for women's r-t-w in terms of variety, sales volume, and production --Produces all types of women's apparel including coats, suits, day and evening dresses, sportswear and accessories of all kinds --Maintains supremacy in abundance of production knowhow and design talent --Remains the nation's largest center for marketing, merchandising and promoting ladies' r-t-w --Manufacturing largely done in multi-plant operations (jobber-contractor system)	
LOCATION OF PHYSICAL FACILITIES: --Showroom and factory space concentrated on Seventh Avenue between 35th and 40th and bounded by 8th and Broadway (Avenue of the Americas) --Trend to locating manufacturing plants outside the metropolitan area	
SIZE OF INDUSTRY IN IMMEDIATE MARKET AREA: --First in the United States in terms of production centers - 62.1% of United States' sales --Number of firms engaged in manufacturing of women's coats, suits, blouses, dresses and sportswear - 2,000 --Annual dollar volume of these firms - $4,050 million	

LOS ANGELES AREA - WOMEN's APPAREL MARKET

PRESENT STATUS

SUMMARY OF FACTUAL INFORMATION	PLEASE NOTE ADDITIONAL FACTS, COMMENTS, OR SUGGESTIONS
SIGNIFICANCE OF MARKET: --Primarily known for sportswear and casual wear, although broader categories and price lines are being produced annually --Known as an international merchandise center - products from U. S., Canada, the Far East, Central and South America --Presents five major market openings, although Mart is open for business 52 weeks a year --Considered a test market for consumer acceptance of styles, colors and fabrics --Size of California Mart recognized as a major factor in marketing of goods (4,000 lines shown annually)	
LOCATION OF PHYSICAL FACILITIES: --Showrooms located in California Mart, 110 E. 9th Street, Los Angeles - downtown Los Angeles	
SIZE OF INDUSTRY IN IMMEDIATE MARKET AREA: --Second to New York in terms of production of women's apparel - 6.2% of United States' sales --Number of firms manufacturing women's coats, suits, blouses, dresses and sportswear - 198 --Annual (1973) dollar volume of these firms - $378 million	

DALLAS AREA - WOMEN'S APPAREL MARKET

PRESENT STATUS

SUMMARY OF FACTUAL INFORMATION	PLEASE NOTE ADDITIONAL FACTS, COMMENTS, OR SUGGESTIONS
SIGNIFICANCE OF MARKET: --Noted primarily for production of medium to popular-priced sportswear and dresses --Designing is largely adaptation of couture designs to meet consumer demand --Manufacturing done largely by the inside shop method --Promotes apparel with "Dallas Look" --Serves primarily retailers from central and southern parts of the United States, although exhibitors and buyers come from all states and a few foreign countries. --Five women's and children's market sessions are held annually --Apparel Mart structure noted for its size (1,300,000 square feet of permanent and transient showroom space) and for its convenience (over 4,000 lines shown under one roof) --Area of Apparel Mart designated exclusively for showing of Western Wear	
LOCATION OF PHYSICAL FACILITIES: --Part of Dallas Market Center Complex --Showrooms located in Apparel Mart, 2300 Stemmons Freeway	
SIZE OF INDUSTRY IN IMMEDIATE MARKET AREA: --Produces significant amount of women's wear - 1.4% of United States' sales --Number of firms producing women's coats, suits, blouses, dresses and sportswear - 52 --Annual (1973) volume of these firms - $220,600	

SOURCES OF INFORMATION ABOUT MARKETS

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APPENDIX C

MASTER LIST OF APPAREL MANUFACTURERS

USED FOR SAMPLE

APPAREL MANUFACTURERS

ALABAMA

Roanoke Manufacturing Company
*Russell Corporation
Steiner-Lobman, Inc.

ARIZONA

Debby Manufacturing Company
Talley Industries, Inc.

ARKANSAS

Tuf-Nut Company, Inc.

CALIFORNIA

Alex Coleman, Inc.
*Alfred Paquette, Inc.
Ardee Sportswear, Inc.
Arpeja-California, Inc.
Beautee-Fit Company
*Benlee Blouses, Inc.
Brooks Industries, Inc.
*California Holiday
Campus Casuals of California
Cee Sportswear, Inc.
Charm of Hollywood
*Check Point
Cole of California
Collegian Sportswear, Inc.
Enduro of California
*Ernst Strauss, Inc.
Fritzi of California Manufacturing Company
*Helga, Inc.
*Hollywood Blouses, Inc.
*Joy Stevens - California
Koracorp Industries, Inc.
Lanz of California
Leadtec California, Inc.
*Levi Strauss and Co.
Lilli-Ann Corporation
Maurice Holman, Inc.
*Michaelson, Inc.
Miss Elliette, Inc.
*Miss Pat
Mister Remo
Norman Wiatt Company
*Patty Woodard, Inc.
Peggylou Company

CALIFORNIA (Cont'd.)

Roth-Le Cover of California
Rough Rider, Inc.
*Tami, Inc.

COLORADO

*Bayly Corporation
Gano-Downs Clothing Corporation

CONNECTICUT

D & I Shirt Company
Gant Shirtmakers
Lyngrace Manufacturing Corporation
Mayehoff
*May Manufacturing Co.
M. Schwartz, Inc.
Norman Dress Company
*The Lombardi Company
Warnaco, Inc.

FLORIDA

Alix of Miami
*A Trysting Place, Inc.
Bernardo, Inc.
*Daisy's Originals, Inc.
H. P. Shapiro Corporation
*Tropix Togs, Inc.

GEORGIA

Bressler Bros., Inc.
Brunswick Manufacturing Company
D'Lang Fashions
Multi-Line Industries
Oxford Industries
Saul Brothers and Company, Inc.
Shirley of Atlanta
Tibro Manufacturing Company, Inc.

ILLINOIS

Arora Women's Coat Company
Bender Glick Sportswear Manufacturing, Inc.
Boris Smole and Sons
Centralia Apparel, Inc.
Chicago Custom Tailors
Consolidated Foods Corporation

*Returned

ILLINOIS (Cont'd.)

*Decatur Garment Company
Hart, Schaffner and Marx
Martha Manning Company
Northwest Industries, Inc.
Osgood and Sons, Inc.
Princess Peggy, Inc.
Riverdale Coat Company
*R. M. Kaufmann

INDIANA

*A. Coddington Garment Co.
Eastmoor Company, Inc.
Thorntown Textile Corporation

KANSAS

*Annshire Garment Company
Gay Gibson
*H. D. Lee Co., Inc.
H. L. Miller and Sons, Inc.

KENTUCKY

*CBS Dress and Sportswear Company

MAINE

Belfast Manufacturing Company

MARYLAND

*Ben Her Corporation
Claire Frock Co.

MASSACHUSETTS

Berkshire Apparel Corporation
Cable Industries Company, Inc.
*Cheryl Dress Corporation
*College Town, Inc.
*David H. Smith
Ess Bee Manufacturing Company
Girltown, Inc.
*Gowns by Priscilla of
Boston, Inc.
House of Bloom, Inc.
Jeny Sportswear, Inc.
Kenneth Dress Company, Inc.
Lauren Sportswear Corporation
Lowenstein Dress Corporation
Marvel Manufacturing, Inc.
*Muriel Frocks, Inc.

MASSACHUSETTS (Cont'd.)

NBC Garment Manufacturing
Company
*Rainbow Girl Coat Company, Inc.
Robert Leonard Corporation
*Stadium Corporation
Stafford Garment Manufacturing
Corporation
Stratton Coats

MISSOURI

Country Set Division
Interco, Inc.
Kellwood Company
King Louie International, Inc.
Nadine Formals, Inc.
*Nelly Don, Inc.
R. Lowenbaum Manufacturing Company

NEW HAMPSHIRE

L. W. Packard Co.
*Manchester Knitted Fashions

NEW JERSEY

Aggressive Manufacturing Company,
Inc.
Athlone Industries, Inc.
Dresscraft Company, Inc.
Evan Picone, Inc.
Hers Apparel Industries, Inc.
Jonathan Logan, Inc.
*Lafayette Sportswear Corporation
Landy Manufacturing, Inc.
M & M Coat Company
Phil's Dress Co.
Regal Accessories, Inc.
South River Waist and Dress Company
*Yolanda Garment Company

NEW YORK

Adelaar Brothers, Inc.
Aileen, Inc.
Alison Ayres, Inc.
*Apex Dress Co., Inc.
*Arbe Originals, Inc.
Arlon Manufacturing Corporation
Barr and Beards, Inc.
Battani, Ltd.
Bernson Mills, Inc.

*Returned

NEW YORK (Cont'd.)

Biflex International, Inc.
Bleeker Street, Inc.
Blouses by Vera, Inc.
Botany Industries, Inc.
Buccaneer Manufacturing Company
Caludia Costumes, Inc.
Candi Wraps, Inc.
Cluett, Peabody and Company, Inc.
Conn Knitting Mills, Inc.
Country Miss, Inc.
D & L Dress Company, Inc.
Damon Creations, Inc.
Damon Dress, Inc.
David Crystal, Inc.
*Devine Garment Company, Inc.
Diane Young Sportswear, Inc.
Drew National Corporation
Economy Blouse Corporation
Ekmar Corporation
First Republic Corporation of America
Gail Roberts, Inc.
Garan, Inc.
Gaspar Lafata and Company
Gro-Up Frocks, Inc.
Handmacher-Vogel, Inc.
Harwood Companies, Inc.
Henry K. Seigel Company
Hill Corporations
Holiday Togs, Inc.
House of Knitting, Inc.
Imperial Reading Corporation
Judy Bond, Inc.
Kappa Frocks, Inc.
Kayser-Roth Corporation
Kay Windsor, Inc.
Kenrose Manufacturing Company
L'Aiglon Apparel, Inc.
Lehigh Valley Industries, Inc.
Leslie Fay, Inc.
Liberty Circle Corporation
Lilly Lynn
*Majestic Frocks
Malcom Starr, Inc.
Manati Industries, Inc.
Manhattan Industries
Maranda, Inc.
Marlene Industries Corporation
Maybro Junior Sportswear Company, Inc.
Michael Berkowitz Company

NEW YORK (Cont'd.)

*Mode Craft Company
Oak Hill Sportswear, Inc.
Oneonta Dress Company
Originala, Inc.
Paraphernalia, Inc.
Pat Fashion Industries, Inc.
Phillips-Van Heusen Corporation
Printogs Ltd.
Puritan Fashions Corporation
Roanna Togs, Inc.
Russel Taylor
Shy Anne Casuals, Inc.
Sinclair Mills, Inc.
The Bali Company, Inc.
Tyrol Sportswear, Inc.
U. S. Industries, Inc.
Van Baalen Pacific Corporation
Van Raalte Company, Inc.
Venice Industries, Inc.
Westbury Fashions
Yolanda Dress Corporation

NORTH CAROLINA

Blue Bell, Inc. (Wrangler)
*Carlonia Maid Products, Inc.
Chatham Manufacturing Company
Hadley Corporation
Hampton Industries
Inderia Mills Company
Piedmont Garment Company
*Smart Styles, Inc.
Stanley Knitting Mills, Inc.

OHIO

*Bobbie Brooks, Inc.
*Buckeye Apparel, Inc.
Fashion Frocks, Inc.
Mack Shirt Corporation
Meyers Development Corporation
Palm Beach Company
William Bayley Company

OREGON

Jantzen, Inc.
*White Stag Manufacturing Company

*Returned

PENNSYLVANIA

Arco Fashions, Inc.
*Cata Garment Company
Charles Peberdy and Son, Inc.
Classic Dress Company
Continental Cloak and Suit Company, Inc.
Deborah Dress Company
Devon Apparel, Inc.
Dutchmaid, Inc.
El-Jay Dress Manufacturing, Inc.
Fernbrook and Company
*Jacques De Loux, Inc.
J. B. Sportswear Manufacturing
J M J Fabrics, Inc.
Kay Fashions, Inc.
K & M Sportswear Manufacturing Company, Inc.
Lark Dress Company
L. B. J. Garment Corporation
*Lehigh Frocks, Inc.
Linder Brothers, Inc.
M & M Knitting Mills
Mercersburg Dress Company
Nedrick Shirt Manufacturing Company
Queen Casuals, Inc.
Rosenau Brothers, Inc.
Rosmar Manufacturing Corporation
Ship 'N Shore, Inc.
Shomokin Dress Company
Sun Clothes, Inc.
Talbott Knitting Mills
*Tami Sportswear, Inc.
V. F. Corporation
Voguewear, Inc.
Wyoming Valley Garment Company

RHODE ISLAND

Jacob Finklestein and Sons
Priscilla Sportswear Company, Inc.

SOUTH CAROLINA

Stone Manufacturing Company
Wentworth Manufacturing

TENNESSEE

Genesco, Inc.

TEXAS

Bogart Industries, Inc.
Carr Manufacturing Company
Dallas Sportswear Company, Inc.
Donovan Galvani of Dallas, Inc.
Howard B. Wolf, Inc.
Lorch-Westway Corporation
*Macho Manufacturing
Mann Manufacturing Company
McNair Clothing Manufacturing Company
Mize Brothers Manufacturing Company
*Nardis of Dallas, Inc.
*Robert R. Michlin, Inc.
Softwear Garment, Inc.
Sue Ann, Inc.

VERMONT

Dick's Dress Company
Hoy Manufacturing Company, Inc.

VIRGINIA

Tully Corporation of Virginia

WEST VIRGINIA

Shenandoah Corporation

WISCONSIN

E. Weinshel and Brother Company
Jack Winter, Inc.
Junior House, Inc.

*Returned

APPENDIX D

AMERICAN APPAREL MANUFACTURERS SURVEY

June 10, 1974

Dear American Apparel Manufacturer,

Few recent studies have focused attention on fashion markets in the United States. One study, completed in 1966, discussed the status of the Dallas fashion market. The enclosed questionnaire is one part of a thesis study designed to draw together current facts about American apparel manufacturers and the use of three major fashion markets--New York, Los Angeles and Dallas.

Completion of the enclosed questionnaire will provide the factual information needed to study the location and size of apparel manufacturing firms in the United States and the use of major fashion markets by manufacturers. As a result of this study, a report on the status of the women's apparel industry in the mid-1970's will be summarized and made available to you or the person you designate in the space provided on the first page of the questionnaire.

Would you, or the person you designate, please complete the attached questionnaire by July 15 and return it in the self-addressed, stamped envelope provided for this purpose. I assure you that the information you contribute will be kept confidential.

Sincerely,

Mrs. Charles Scott
#24 Preston Circle
Stillwater, Oklahoma 74074

AMERICAN APPAREL MANUFACTURERS SURVEY

Please complete and return this questionnaire by July 15 to: Mrs. Charles Scott
#24 Preston Circle
Stillwater, Oklahoma 74074

Person designated to complete questionnaire:

________________________ ________________________
Name Title

(I wish to receive the results of this survey. _____yes)

FIRM INFORMATION

1. Name of firm ________________________

2. Address of firm ________________________

3. Phone ________________________

4. Approximate number of years in operation ____________

FIRM OPERATION

5. Which of the following categories is an approximate estimate of the size of your firm according to annual dollar volume? Please check one.

   a. Under $1 million _____
   b. $1 - 4 million _____
   c. $5 - 9 million _____
   d. $10 - 24 million _____
   e. $25 - 49 million _____
   f. $50 - 100 million _____
   g. Over $100 million _____

6. Does your firm have more than one apparel manufacturing division? Please check one.

   a. _____one
   b. _____two
   c. _____three
   d. _____four
   e. _____five
   f. _____more than five

7. How does your firm designate each of its apparel manufacturing divisions? Please list.

Divisions
(Column 1)

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

8. Please estimate percentage of total production for each division listed in Column 1.

Percentage
(Column 2)

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

9. Total number of sales representatives ______________________________

10. Do your sales representatives carry any lines other than the ones made by your firm? a. yes_____ b. no_____

MERCHANDISE INFORMATION

11. Which of the following classifications of ladies' apparel do you manufacture? Please check one or more.

Classification
(Column 1)

a. _____Junior

b. _____Misses

c. _____Women's

Others

d. ____________

e. ____________

12. Please estimate percentage of total production for each classification indicated in Column 1.

Percentage
(Column 2)

a. ____________

b. ____________

c. ____________

d. ____________

e. ____________

13. Which of the following price categories best represents the retail prices of apparel you manufacture? Please check all that apply.

a. Juniors	b. Misses	c. Women's
1. _____under $5	1. _____under $5	1. _____under $5
2. _____$6 - 15	2. _____$6 - 15	2. _____$6 - 15
3. _____$16 - 25	3. _____$16 - 25	3. _____$16 - 25
4. _____$26 - 35	4. _____$26 - 35	4. _____$26 - 35
5. _____$36 - 45	5. _____$36 - 45	5. _____$36 - 45
6. _____$46 - 55	6. _____$46 - 55	6. _____$46 - 55
7. _____$56 - 65	7. _____$56 - 65	7. _____$56 - 65
8. _____$66 - 75	8. _____$66 - 75	8. _____$66 - 75
9. _____$76 - 85	9. _____$76 - 85	9. _____$76 - 85
10. _____$86 - 95	10. _____$86 - 95	10. _____$86 - 95
11. _____$96 - 100	11. _____$96 - 100	11. _____$96 - 100
12. _____$100 - up	12. _____$100 - up	12. _____$100 - up

Note: If you manufacture other classifications of merchandise, please insert the appropriate term at the top of one or more of the above columns.

14. Which of the following terms best describe the types of ladies' apparel you manufacture? Please check those that are most descriptive.

a. _____tops	h. _____pant suits
b. _____skirts	i. _____long dresses
c. _____jeans	j. _____short dresses
d. _____slacks	Others
e. _____jackets	k. __________________
f. _____coats	l. __________________
g. _____suits	m. __________________

USE OF MARKETS

15. In which of the following major market areas does your firm have permanent showrooms? Please give address of showroom.

a. New York ______________________________
Room Number Street Address

b. Los Angeles ______________________________
Room Number Street Address

c. Dallas ______________________________
Room Number Street Address

Other permanent showrooms:

d. ______________________________
City Room Number Street Address

e. ______________________________
City Room Number Street Address

f. ______________________________
City Room Number Street Address

16. In which market areas do you have temporary showrooms? Please list.

a. ______________________________
City Address

b. ______________________________
City Address

c. ______________________________
City Address

17. What kinds of stores are represented by the retail buyers you serve? Please check all appropriate categories.

a. _____Group I (Boutiques, Specialty Shops, Jr. Department Stores)
b. _____Group II (Multi-Unit Department Stores, Chain Stores, Mail Order Houses)
c. _____Group III (Discount Chains, Variety Stores)

Others:

d. ______________________________

e. ______________________________

APPENDIX E

FASHION MARKET AREAS: GEOGRAPHICAL

DIVISIONS BY STATE

FASHION MARKET AREAS

Geographical Divisions by State

Region I East Center: New York	Region II Central Center: Dallas	Region III West Center: Los Angeles
New York	Illinois	Arizona
New Jersey	Indiana	Colorado
Pennsylvania	Michigan	Idaho
Connecticut	Ohio	Montana
Maine	Wisconsin	Nevada
Massachusetts	Iowa	New Mexico
New Hampshire	Kansas	Utah
Rhode Island	Minnesota	Wyoming
Delaware	Missouri	California
District of Columbia	Nebraska	Washington
Florida	North Dakota	Oregon
Georgia	South Dakota	Hawaii
Maryland	Arkansas	Alaska
North Carolina	Louisiana	
South Carolina	Oklahoma	
West Virginia	Texas	
Virginia		
Alabama		
Kentucky		
Mississippi		
Tennessee		
Vermont		

APPENDIX F

RELATIONSHIPS BETWEEN MANUFACTURER CHARACTERISTICS AND PERMANENT SHOWROOM LOCATIONS

TABLE XVIII

RELATIONSHIPS OF MANUFACTURER CHARACTERISTICS AND PERMANENT SHOWROOM LOCATIONS: CATEGORY 1 (x^2)

Code: 0 = Response of NO
1 = Response of YES
NY = New York
LA = Los Angeles
Loc = Location

Legend: Observed
Expected
Result of Calculation (cell x^2)

Status of Firm - Geographical Location

NY

LOC	0	1	TOTALS
	3.00	14.00	17.00
1	3.19	13.81	17.00
	0.01	0.00	0.01
	2.00	6.00	8.00
2	1.50	6.50	8.00
	0.17	0.04	0.21
	1.00	6.00	7.00
3	1.31	5.69	7.00
	0.07	0.02	0.09
	6.00	26.00	32.00
TOTALS	6.00	26.00	32.00
	0.25	0.06	0.31

TOTAL CHI-SQUARE = 0.31028 WITH 2 D.F. PROB > CHISQ = 0.8542

LA

LOC	0	1	TOTALS
	11.00	6.00	17.00
1	7.97	9.03	17.00
	1.15	1.02	2.17
	3.00	5.00	8.00
2	3.75	4.25	8.00
	0.15	0.13	0.28
	1.00	6.00	7.00
3	3.28	3.72	7.00
	1.59	1.40	2.99
	15.00	17.00	32.00
TOTALS	15.00	17.00	32.00
	2.89	2.55	5.44

TOTAL CHI-SQUARE = 5.43826 WITH 2 D.F. PROB > CHISQ = 0.0642

DALLAS

LOC	0	1	TOTALS
	13.00	4.00	17.00
1	7.97	9.03	17.00
	3.18	2.80	5.98
	1.00	7.00	8.00
2	3.75	4.25	8.00
	2.02	1.78	3.80
	1.00	6.00	7.00
3	3.28	3.72	7.00
	1.59	1.40	2.99
	15.00	17.00	32.00
TOTALS	15.00	17.00	32.00
	6.78	5.98	12.76

TOTAL CHI-SQUARE = 12.76098 WITH 2 D.F. PROB > CHISQ = 0.0019

TABLE XVIII (Continued)

Size of Firm - Lines Carried by Other Salesmen

NY

LINES	0	1	TOTALS
	2.00	17.00	19.00
0	3.56	15.44	19.00
	0.69	0.16	0.84
	4.00	9.00	13.00
1	2.44	10.56	13.00
	1.00	0.23	1.23
	6.00	26.00	32.00
TOTALS	6.00	26.00	32.00
	1.69	0.39	2.08

TOTAL CHI-SQUARE = 2.07620 WITH 1 D.F. PROB > CHISQ = 0.1454

LA

LINES	0	1	TOTALS
	8.00	11.00	19.00
0	8.91	10.09	19.00
	0.09	0.08	0.17
	7.00	6.00	13.00
1	6.09	6.91	13.00
	0.13	0.12	0.25
	15.00	17.00	32.00
TOTALS	15.00	17.00	32.00
	0.23	0.20	0.43

TOTAL CHI-SQUARE = 0.42728 WITH 1 D.F. PROB > CHISQ = 0.5208

DALLAS

LINES	0	1	TOTALS
	8.00	11.00	19.00
0	8.91	10.09	19.00
	0.09	0.08	0.17
	7.00	6.00	13.00
1	6.09	6.91	13.00
	0.13	0.12	0.25
	15.00	17.00	32.00
TOTALS	15.00	17.00	32.00
	0.23	0.20	0.43

TOTAL CHI-SQUARE = 0.42728 WITH 1 D.F. PROB > CHISQ = 0.5208

TABLE XVIII (Continued)

Showroom Locations - Permanent

NY

LA	0	1	TOTALS
0	5.00 2.81 1.70	10.00 12.19 0.39	15.00 15.00 2.09
1	1.00 3.19 1.50	16.00 13.81 0.35	17.00 17.00 1.85
TOTALS	6.00 6.00 3.20	26.00 26.00 0.74	32.00 32.00 3.94

TOTAL CHI-SQUARE = 3.94168 WITH 1 D.F. PROB > CHISQ = 0.0445

DALLAS

LA	0	1	TOTALS
0	13.00 7.03 5.07	2.00 7.97 4.47	15.00 15.00 9.54
1	2.00 7.97 4.47	15.00 9.03 3.94	17.00 17.00 8.42
TOTALS	15.00 15.00 9.54	17.00 17.00 8.42	32.00 32.00 17.95

TOTAL CHI-SQUARE = 17.95297 WITH 1 D.F. PROB > CHISQ = 0.0001

DALLAS

NY	0	1	TOTALS
0	5.00 2.81 1.70	1.00 3.19 1.50	6.00 6.00 3.20
1	10.00 12.19 0.39	16.00 13.81 0.35	26.00 26.00 0.74
TOTALS	15.00 15.00 2.09	17.00 17.00 1.85	32.00 32.00 3.94

TOTAL CHI-SQUARE = 3.94168 WITH 1 D.F. PROB > CHISQ = 0.0445

TABLE XVIII (Continued)

Types of Retailers Served - Group I

NY

GROUP I	0	1	TOTALS
0	1.00 0.56 0.34	2.00 2.44 0.08	3.00 3.00 0.42
1	5.00 5.44 0.04	24.00 23.56 0.01	29.00 29.00 0.04
TOTALS	6.00 6.00 0.38	26.00 26.00 0.09	32.00 32.00 0.46

TOTAL CHI-SQUARE = 0.46213 WITH 1 D.F. PROB > CHISQ = 0.5039

LA

Group I	0	1	TOTALS
0	3.00 1.41 1.81	0.0 1.59 1.59	3.00 3.00 3.40
1	12.00 13.59 0.19	17.00 15.41 0.16	29.00 29.00 0.35
TOTALS	15.00 15.00 1.99	17.00 17.00 1.76	32.00 32.00 3.75

TOTAL CHI-SQUARE = 3.75172 WITH 1 D.F. PROB > CHISQ = 0.0499

DALLAS

GROUP 1	0	1	TOTALS
0	3.00 1.41 1.81	0.0 1.59 1.59	3.00 3.00 3.40
1	12.00 13.59 0.19	17.00 15.41 0.16	29.00 29.00 0.35
TOTALS	15.00 15.00 1.99	17.00 17.00 1.76	32.00 32.00 3.75

TOTAL CHI-SQUARE = 3.75172 WITH 1 D.F. PROB > CHISQ = 0.0499

TABLE XVIII (Continued)

Types of Retailers Served - Group II

NY

GROUP 2	0	1	TOTALS
0	2.00 1.31 0.36	5.00 5.69 0.08	7.00 7.00 0.44
1	4.00 4.69 0.10	21.00 20.31 0.02	25.00 25.00 0.12
TOTALS	6.00 6.00 0.46	26.00 26.00 0.11	32.00 32.00 0.57

TOTAL CHI-SQUARE = 0.56733 WITH 1 D.F. PROB > CHISQ = 0.4577

LA

GROUP 2	0	1	TOTALS
0	3.00 3.28 0.02	4.00 3.72 0.02	7.00 7.00 0.05
1	12.00 11.72 0.01	13.00 13.28 0.01	25.00 25.00 0.01
TOTALS	15.00 15.00 0.03	17.00 17.00 0.03	32.00 32.00 0.06

TOTAL CHI-SQUARE = 0.05808 WITH 1 D.F. PROB > CHISQ = 0.7963

DALLAS

GROUP 2	0	1	TOTALS
0	4.00 3.28 0.16	3.00 3.72 0.14	7.00 7.00 0.30
1	11.00 11.72 0.04	14.00 13.28 0.04	25.00 25.00 0.08
TOTALS	15.00 15.00 0.20	17.00 17.00 0.18	32.00 32.00 0.38

TOTAL CHI-SQUARE = 0.37934 WITH 1 D.F. PROB > CHISQ = 0.5455

TABLE XVIII (Continued)

Types of Retailers Served - Group III

NY

GROUP 3	0	1	TOTALS
0	6.00 5.06 0.17	21.00 21.94 0.04	27.00 27.00 0.21
1	0.0 0.94 0.94	5.00 4.06 0.22	5.00 5.00 1.15
TOTALS	6.00 6.00 1.11	26.00 26.00 0.26	32.00 32.00 1.37

TOTAL CHI-SQUARE = 1.36752 WITH 1 D.F. PROB > CHISQ = 0.2405

LA

GROUP 3	0	1	TOTALS
0	12.00 12.66 0.03	15.00 14.34 0.03	27.00 27.00 0.06
1	3.00 2.34 0.18	2.00 2.66 0.16	5.00 5.00 0.35
TOTALS	15.00 15.00 0.22	17.00 17.00 0.19	32.00 32.00 0.41

TOTAL CHI-SQUARE = 0.40993 WITH 1 D.F. PROB > CHISQ = 0.5295

DALLAS

GROUP 3	0	1	TOTALS
0	12.00 12.66 0.03	15.00 14.34 0.03	27.00 27.00 0.06
1	3.00 2.34 0.18	2.00 2.66 0.16	5.00 5.00 0.35
TOTALS	15.00 15.00 0.22	17.00 17.00 0.19	32.00 32.00 0.41

TOTAL CHI-SQUARE = 0.40993 WITH 1 D.F. PROB > CHISQ = 0.5295

TABLE XIX

CORRELATION COEFFICIENTS OF MANUFACTURER CHARACTERISTICS AND PERMANENT SHOWROOM LOCATIONS: CATEGORY 2 (ϕ)

Characteristic	Permanent Showroom N.Y.	Permanent Showroom L.A.	Permanent Showroom Dallas
Age of firm	-.034222	.0122859	.509805
Size of firm by annual dollar volume	.26847	.488321	.492018
Number of manufacturing divisions	.272201	.374045	.446385
Number of sales representatives	.469300	.535045	.613045
Maintain other permanent showrooms	.258171	.538563	.580393
Maintain temporary showroom	.243593	.014511	.130599
Number of items of apparel produced	.204277	.344135	.368265
Manufacture ladies' apparel	.328456	.140390	.115321
Manufacture men's apparel	-.367121	-.095194	-.072779
Manufacture children's apparel	.100901	.176471	.186886
Manufacture junior apparel	.186868	.076507	.159119
Manufacture misses' apparel	-.347381	-.078251	-.194751
Manufacture women's apparel	.23259	-.173190	-.005757

VITA

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