AN ANALYSIS OF FASHION DESIGN IN THE CANADIAN CLOTHING AND FOOTWEAR INDUSTRIES

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[Kuzik, Chris S

F I N A L   E D I T I O N

January 16, 1973

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P R E F A C E

This report was prepared for the Apparel and Textiles Branch of the Department of Industry, Trade and Commerce to provide persons in industry and government who are interested in the viability of the Canadian Apparel Industries with an insight into the supply/demand situation for fashion designers in Canada and the role which fashion design plays at this stage in the development of the Canadian industries. It represents the views of the author and should not be regarded as expressing Government judgements or policies which are likely to be adopted.

The Board of Directors of Fashion/Canada are studying this report with the object of recommending a program to industry and the Provincial and Federal Governments to meet the various needs which Mr. Kuzik has identified.

Since drafting this report Mr. Kuzik has accepted the position as Executive Director, Apparel Manufacturers Association of Ontario. He may be contacted at:

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Extra copies of this analysis are available from the Fashion Office, Apparel and Textiles Branch, Department of Industry, Trade and Commerce, Ottawa. K1A 0H5

INTRODUCTION

The history of fashion design in Canada reflects the anomaly of rapid growth with limited development.

Centuries ago the European vogue for beaver hats and coats created a fur industry. Fabric mills, clothing and footwear manufacturers followed and established an early and continuing Canadian reputation for quality merchandise with functional styling. Today statistics record the annual sales from these industries in billions of dollars.

Despite this growth, for the most part, fashion design in Canada continues to be derivative. There are a few enclaves of originality - largely in Montreal - but essentially Canadian fashion follows international trends, with recognized creativity primarily achieved by outstanding individuals rather than the combined and sustained efforts of industry sectors or geographic areas.

Clothing and footwear are consumer necessities. However, with our stage of economic development, Canadians purchase more clothes and shoes than they require on a "need" basis. Increasingly expenditures are made on an "impulse" basis, on the consumer's changing impressions of good taste, individuality, style, on generally psychological and sociological factors. Collectively, these are termed fashion demand with fashion defined as the general public acceptance of a particular item of apparel. It is in serving this demand that the apparel industries exist in their present magnitude.

The point of consideration is that the Canadian manufacturers primarily look to international sources for inspiration and influence, rather than generating an independent current within the fashion mainstream. This results in a reduced potential for export sales, a diminished ability to compete against imports, as well as a dearth of employment opportunities for many of our creative people.

This paper reviews the fashion design situation within the apparel industries. An assessment is made in economic, not artistic terms. The objective is to examine the role of fashion in these industries, and to determine at which stage the majority of apparel firms are, in the continuum from total copying on the one extreme to sustained originality on the other. With greater originality in fashion design, the competitive position of these industries is enhanced; with effective merchandising and efficient manufacturing, it is maximized.

This report is the product of discussions held with a wide cross-section of senior management in every major industry sector, product group and geographic concentration in Canada. This was supplemented by interviews with retailers, sales personnel, government officials, association directors, teachers of fashion design, as well as fashion designers.

I would like to acknowledge the special contribution of Mr. Yves Grignon, who undertook the interview program within the footwear industry.

This paper has two main objectives: identifying the supply-demand situation for fashion designers in the Canadian clothing and footwear (apparel) industries, and recommending a designer development program. Each are the subject of the second and third chapters respectively. An introductory chapter on fashion is provided, for the amount of designers required by the apparel industry will reflect, in sequence, the demand for fashion by the Canadian consumer, and the requirements for fashion design by the apparel manufacturer.

I trust that this report is as the length of a women's dress, short enough to be interesting, yet long enough to cover the subject.

Chris S. Kuzik,
Industrial Officer,
Apparel and Textiles Branch,
Department of Industry, Trade and Commerce.

December, 1972
Ottawa, Ontario

CHAPTER I

AN ANALYSIS OF FASHION

The functional relationship between fashion and the clothing and footwear industries is best expressed by the following axiom:

> "It is fashion that makes the apparel industry, more than industry which makes fashion."

Fashion creates the effective demand for a product, which a manufacturer, if astute and aggressive, can service. Fashion results in the obsolescence of the previous product - it is (psychologically) 'out of style' encouraging additional expenditures for a newer model even though the original product may have many years of service left.

> "The economic role of fashion is to promote obsolescence and to influence consumers to purchase garments beyond their mere replacement needs. From season to season, style changes may seem small, and a woman may be able to 'get by' without giving into a new fashion, but as time passes, her resistance must decrease, lest she become conspicuous by wearing what now is manifestly last year's fashions." *

Fashion in general sense has been called the force behind most discretionary spending. It influences not only what we wear, but also what we do and how we live. Hairstyles, vacations, methods of raising children, residential housing locations, are part of a long list of elements under its sway, although fashion is normally associated with apparel, particularly women's apparel. Historically fashion was the prerogative of the few; today it is the concern of the many.

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* Helfgott, R.B. "Women's and Children's Apparel"; page 60.

Fashion in the apparel industries is the designing and manufacturing of clothing and footwear for people in harmony with their needs, surroundings, physiques, activities and personalities. It is not based on a fragmentary whim of a creative designer, nor today is it dictated by any one source such as Paris or Rome (although these influences remain considerable).

Fashion results from the interaction of three sources: first, the creative expression of the designer; second, the investment in production by the manufacturer; third, the degree of consumer acceptance as reflected by retail sales. Designers through their manufacturers propose rather than impose fashion. Not one of these alone can set a fashion trend. Each influences the other. Since the consumer is also a product of his society, not solely a determinant of demand, his fashion requirements reflect the dynamics of social change.

There are three dimensions in analysing the diffusion of fashion: economic, sociological and psychological. Fashion involves change, and the acceptance of change by large groups. Economists note that expenditures for more fashion are dependent upon increased purchasing power (personal disposable income). With more people having larger incomes, the greater the tendency for additional purchases of fashion apparel. Sociologists have observed the tendency of fashion to "trickle down", to percolate from one social class to another, usually in a downward direction. With rising incomes and education shared over a wide range of the population and geographic and occupational mobility, the sociological influence has declined considerably. In its place the psychological influence has become paramount.

> "Self-confidence rather than self-expression is the basis for those mental expressions we wish to convey first to ourselves and then to others. We may need to convince ourselves that we are attractive, efficient, capable of 'good taste'. Fashion can protect us from psychologically grounded fears that are socially engendered. It protects us from obscurity; from ridicule, if we are different or if we lack taste. It protects the anxious and immature inner-self from outer attack." *

What establishes the fashion cycle momentum, however, is a combination of the economic, sociological and psychological. Rising incomes with population growth support more fashion expenditures, with the actual choice dependent upon a combination of the sociological and psychological - the (apparently contradictory) need not to be different (to be 'in style') yet to be individual. The average person wishes to wear what he or she considers "everone else" is wearing, yet in their selection of apparel, to have particular combinations of fabric, trim, colour and design to meet individual preferences and physiques. What keeps the fashion wheel rolling, however, are style leaders.

Within most localities there are individuals and groups who feel the need for independent expression. Many teenagers do not own/wear conventional men's suits, ties, or a particular foundation garment.

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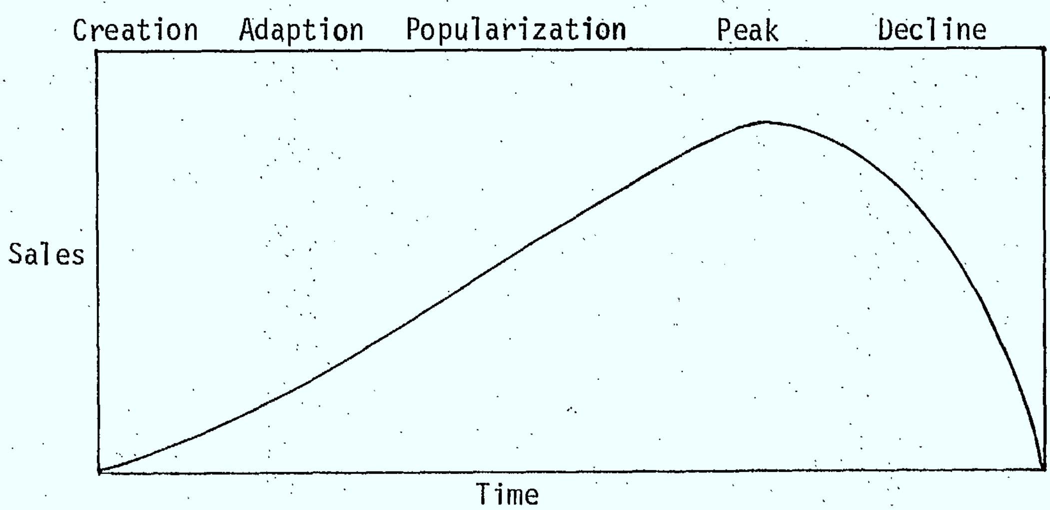
* Anspach, K. "The Why of Fashion"; pages 26, 27.

Certain individuals, ranging from internationally known entertainers to classmates, feel compelled to pioneer new styles.

> "It is important for style leaders to be among the first, in order to reap the psychological rewards of being in the forefront of fashion, and it is almost as important to flee from the new style once it is assumed by the masses. Farther back in the procession among the followers, the motivations are purely social - persons adapt styles to avoid being conspicuously traditional rather than conspicuously original." *

Thus the dynamics of fashion. There is not one prevailing fashion at any given time. Different fashions appear in various countries at the same time, and within confined areas, there are literally hundreds of fashions, some in their prime, others fading or beginning, all following this basic pattern which can be graphically portrayed as follows:

THE FASHION CYCLE



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* Source misplaced - Dr. Anne Kernaleguen of the University of Alberta has been conducting research on style leaders within the fashion process.

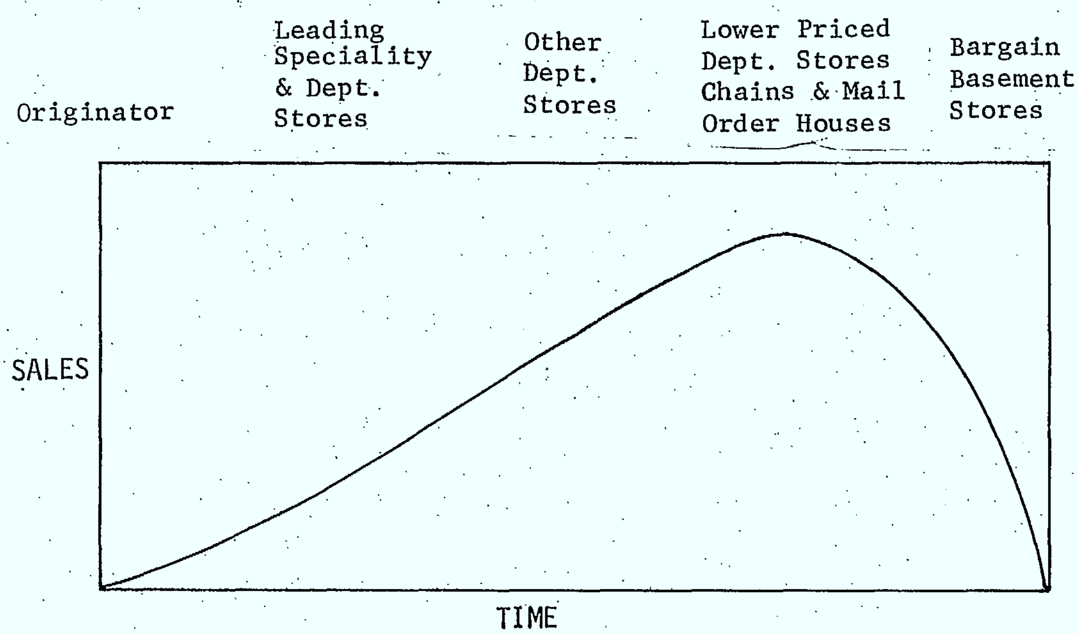
Applying this model to the current situation requires qualification. The time factor for each fashion cycle varies with each product group, from several years in fur coats, running shoes and men's socks, to a few weeks for many items of women's sportswear. However, in all categories, the time element has been shortened considerably compared to previous years.

In addition, two major complications are apparent. First, there are many "fads" (mini fashions), from ethnic embroidery to hooded dresses which come and go quickly and do not achieve the status of fashion. When an item receives wide public acceptance, then it becomes, by definition, a fashion. Furthermore, if we were to take a Dow-Jones type average (diffusion index) of all the major fashions, we would find the existence of "styles" (long term fashions). They usually are depicted as the length of a woman's dress, heel or shape of the silhouette, and change more gradually in harmony with social changes. Manufacturers in the more expensive apparel areas (women's coats, men's suits) must be particularly aware of this cycle.

The second complication is that there is not just a fashion cycle, but in fact there are three cycles - a design cycle, a fabric cycle, and a colour cycle. Denims, corduroys, and leathers are currently in vogue. As for colours, certain cominations are emphasized each season, particularly in women's apparel, with recent trends indicating a breakup of the traditional dark colours for winter, light for summer.

In a recent article,* Mr. R.P. Alair, Supervisor of Ladies Sportswear, Simpson-Sears, Montreal, extended the analysis of the fashion cycle into the retail sphere. He noted the following progression:

THE FASHION MERCHANDISING CYCLE



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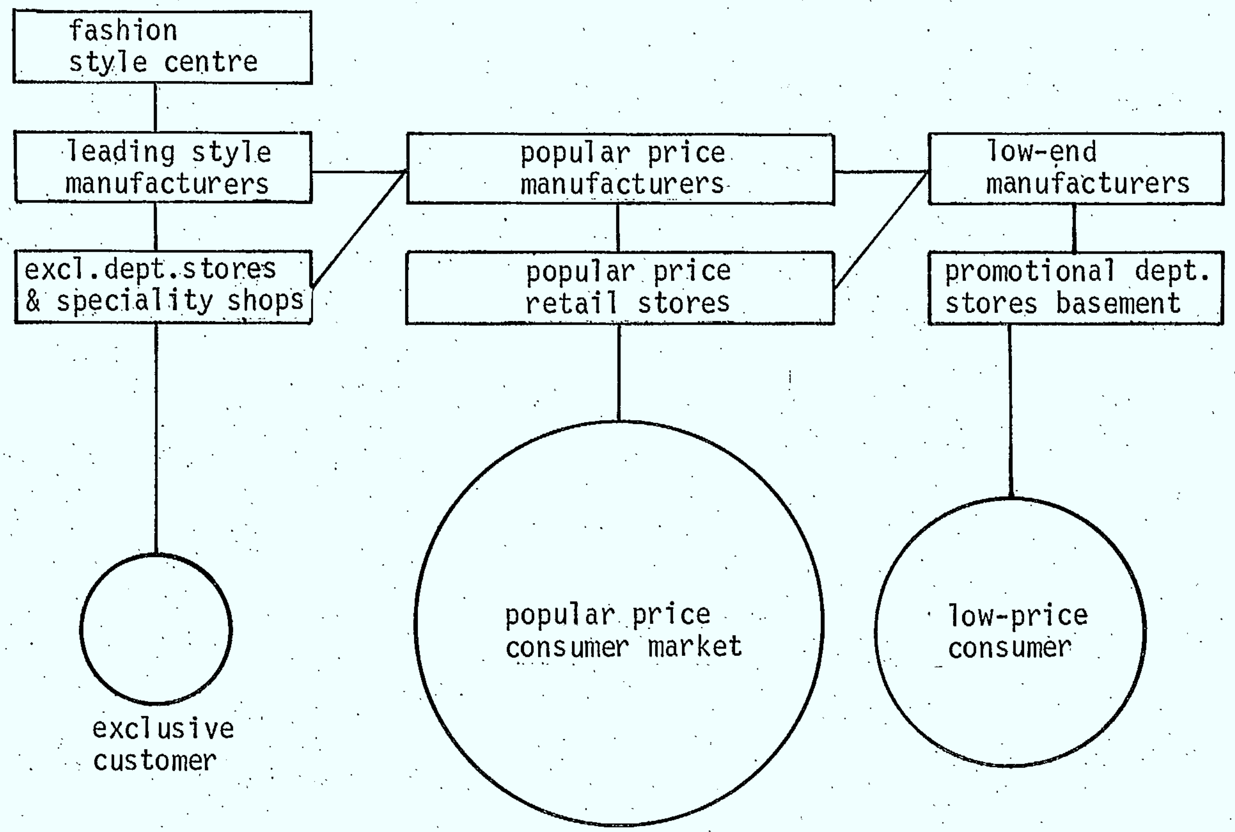
* Alair, R.P. "Retailers' Role in Textile Marketing." Book of Papers for the 13th Textile Seminar, The Textile Technical Federation of Canada. pages 113-119.

Incorporating the model to include manufacturers and consumers as well as retailers results in the following, with the point that 70% of the activity occurs in the middle column.

THE FASHION MERCHANDISING AND MANUFACTURING CYCLE



Mr. Alair summarized the implications of the current fashion explosion on the Canadian retailer as follows:

> "The successful retailer today, while striving constantly to improve his competitive position by purchasing at the best possible price, must give at least equal attention to the fashion aspects of his business. The significance of fashion has increased so enormously in all lines of merchandise and at all price levels that it is impossible to enjoy any level of success without a thorough understanding of how fashion works . . . . . A new clothing style can run the gamut from the most expensive shop to the basement operation in a matter of weeks." (1)

One of the most interesting characteristics is that fashion cycles go full circle; they revive and when they conform to current tastes, survive. The reason for this is the basic unchanging anatomy of the human body. There are only limited combinations possible. As John Fairchild of Women's Wear Daily notes:

> "The cloth is shaped into silhouettes. Take a choice: First, a silhouette can be straight or it can be wide, flaring at the skirt. Second, the waist can be marked high or low, with a belt or a seam. Third, the silhouette can be loose or fitted. Everything else, details: sleeves, no sleeves; collar, no collar. When you think of designing a dress there isn't much choice, is there really?" (2)

Thus students of the fashion scene note that nothing is truly original in terms of design, with originality more a product of timing rather than innovation. This observation has become a Law of Fashion which states:

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(1) Alair, R.P. "Retailers Role in Textile Marketing"; Book of Papers for the 13th textile seminar (1972; page 117)

(2) Fairchild, J. "The Fashionable Savages"; page 2.

> "The same dress is indecent 10 years before its time, chic in its time, dowdy 3 years after its time, hideous 20 years after its time, amusing 30 years after its time, romatic 100 years after its time, and beautiful 150 after its time.*

There has been a popular speculation that the length of a woman's dress varies with economic fluctuations, i.e. they go up and down in concert with the business cycle. The scenario was that with a downturn, apparel manufacturers wanted to create additional demand so they added to the skirt length to give the consumer "more for her money" thereby stimulating sales. With an upturn came inflation, so to maintain prices, less fabric was used with shortened lengths as a result. It is a fascinating but irrelevant theory in understanding "Goddess Fashion."

An important comment about fashion is that it cannot be manipulated. If it could, the apparel industry would be many times its present size, and apparel expenditures, instead of being a declining percentage of personal disposable income, would be the converse. Fashions reflect the life styles of the population and their changing concept of good taste. These tastes evolve slowly as evidenced in part by the public refusal to accept the midi a few years ago. The relationship between fashion and life style is clear and direct, and subject to considerable analysis in the theory of costume.

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* Laver, J. "Modesty in Dress;" page 122. This is known as Laver's Law of Fashion.

There is a final aspect of fashion which has been omitted. Fashion is synonymous with excitement. A scientist could study Beethoven's symphonies and conclude that they were an interesting series of sound waves. To some degree this analysis is falling into this trap if it didn't mention the satisfaction many people receive in wearing fashion, the interest generated from the miles of retail counters and newspaper commentary, the frenzy of the apparel manufacturers, the promotions, fashion shows, models, and Paris, whose creative geniuses have elevated fashion to an art.

T H E F A S H I O N E X P L O S I O N

Since 1967, what the industry and the public has come to know as the fashion revolution has occured within the apparel industry. The most dramatic change was in men's wear, where the 'peacock revolution' transformed an industry of white shirts and dark suits into the kaleidoscopic proportions of today. High boots, fun furs, wide belts, patterned stockings are many of fashion's dimensions in other product sectors.

The major elements determining apparel expenditures include:

- need (modesty, warmth);
- fashion (decoration);
- special purpose (rainwear, skiing, etc.);
- replacement.

What has increased the importance of fashion and the tempo of change has been suggested by those interviewed to be one, or a combination of the following:

- rising incomes and population;
- effective retail merchandising (shopping centres);
- new fibres and fabrics;
- advancesin textile technology (durable press, bonding, stretch);
- changing life styles;

- urbanization;
- rapid communications/transportation;
- more women working;
- changing population cencentrations (younger);
- more promotions, especially by textile firms;
- small apparel price increases.

To assess the magnitude of the fashion explosion, this author attempted an analysis to ascertain the degree to which current apparel expenditures increased beyond historical rates. One study* concluded that in real terms, U.S. apparel expenditures had increased slightly over 2 percent per annum over historical levels because of the fashion explosion.

The general conclusions were as follows:

1. Although Canadian expenditures on footwear and clothing had increased steadily in the post-war period, both were receiving a declining share of the consumer dollar (currently 7.1%). In Canada, manufacturers have been less able to retain their share as have U.S. apparel manufacturers.
2. Since 1967 there was a distinct increase in apparel expenditures. The period 1967-1970 was 26 percent above the previous three years, and over 200 percent above the 1961-1964 period.

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* Editors of Fortune "Markets of the Seventies"; page 88. They refer to the work of Professor H.S. Whothakker and Professor Lester D. Taylor and their book "Consumer Demand in the United States 1929-1970."

INCREASES IN APPAREL EXPENDITURES
(Millions of Dollars)

	Clothing	Footwear	Total Apparel
1961-1962	58	8	66
1962-1963	83	17	100
1963-1964	93	4	97
1964-1965	131	11	142
1965-1966	130	19	149
1966-1967	121	28	149
1967-1968	156	35	191
1968-1969	137	26	163
1969-1970	181	20	201

3. In attempting to analyse the increase, several economic variables were statistically tested - changes in prices, incomes, population, etc., with personal disposable income (the total amount people have to spend, less taxes) correlating the best. The results in general terms were identical to those achieved by a U.S. study of footwear expenditures , which noted, after examining 12 variables:

> "The overpowering determinant of what people spend on shoes is what they have to spend. Buying of this single commodity reproduces the contours of consumer income with startling faithfulness. Even the timing of turns is amazingly similar." *

4. Attempting to identify the fashion element in increased apparel purchases proved unsuccessful. One approach, measuring the difference in the trend line over the long term (1949-1971), with the period 1967 to 1971, and ascribing it by general evidence to the fashion explosion was discounted because of statistical

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* Mack, R.P. "Factors Influencing Consumption: An Experimental Analysis of Shoe Buying"; page 68.

deficiencies (the standard error was too high compared to the equation presented below). The tangible residue from miles of calculations was the following formula, which suggests that based on historical evidence and statistical analysis, clothing expenditures should reach $3.75 billion by 1975 (and footwear expenditures $600 million) with a major but unknown fraction due to fashion demand.

$$\ln Y = 10.65 - 0.40 \ln X + 0.06\ t$$

with Y = deflated clothing expenditures (1961 dollars)

X = deflated personal disposable income (1961 dollars)

t = time (1949 = 1, 1971 = 23)

5. Whereas it appears possible to ascertain the fashion element in broad apparel categories, it cannot be statistically identified for individual products.

Not all apparel sectors benefitted from the fashion explosion. The leather footwear industry in 1968 and 1969, the women's cloak and suit industry in 1970 and the men's suit industry in 1971 did not. The decline in the leather footwear industry was subject to government analysis; in the case of Canada, the Anti-Dumping Tribunal, and in the United States, by the Presidential Task Force on the U.S. Non Rubber Footwear Industry. Both reports came out strongly in identifying deficiencies in styling as undermining their competitive position against imports. The U.S. study added some comments about the fashion explosion:

> "Changing availabilities and changing consumer preferences for footwear, enhanced by rising income also culminated in a new era of greater emphasis upon fashion and styling ... Some trade estimates indicate, for example, that if fashion were no longer a consideration in consumer buying, total U.S. consumption would be little more than half of its present level. The divergent acceptance between the styles introduced in 1968 and those of 1969 testify to the force of this proposition." *

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* Presidential Task Force on the U.S. Non-Rubber Footwear Industry, "Report"; June 1970; page 10

MARKET ANALYSIS OF APPAREL EXPENDITURES

Verification of the importance of fashion would be market research on consumer behaviour towards purchasing apparel.

In a study* done by Dupont of Canada on the "Girls' Apparel Market", (ages 13-24), a sector which accounts for 25% of total apparel sales, it concluded:

> "The three factors uppermost in young girls' minds when buying clothes are: style, good quality and fabric or fibre. Style is important in all segments of the youth market ..."
>
> "In an effort to determine where the female youth derive their fashion ideas, they were asked questions about the importance of various sources of fashion knowledge, whom they thought were the fashion leaders of their group and how long it takes for a new fashion to catch on:
>
> MAIN FINDINGS:
>
> 1. "The most important sources of new styles in clothing are: window shopping, style and fashion magazines, friends, and ads on TV and radio."
> 2. "The concept of a style leader seems to be fairly constant for all segments of the female market. She is generally from the upper income group and has all-important poise and self-confidence required to be seen in a new style."
> 3. "New styles seem to catch on fairly quickly. Over one half of the sampling stated it took one month or less."

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* Report M.R. 66-74. R.P. Gordon and S.B. Stewart - Marketing Research, Dupont of Canada. "Youth Market, A Study of Single Canadian Girls 13-24"; November 1966. The survey was a random sample with 601 respondents. The reference from the Report are pages 4 & 5 for the 1st quote, and page 80 for the second, with the exception of point 2, which is substituted from page 3.

The results of a more recent study of marketing in the Canadian footwear industry indicated that of the 182 randomly sampled retail firms across Canada, the following ranked highest in influencing purchasing decisions:*

1. Style
2. Delivery
3. Quality
4. Lead time
5. Price
6. Comfort and fit
7. Availability of in-stock back-up
8. Sales representatives
9. Freight costs
10. Special discounts
11. Credit terms
12. Merchandising support
13. Brand name
14. Advertising support

The results of the survey of apparel manufacturers and retailers undertaken for this analysis indicated that the following were the critical market factors:

1. Fashion
2. Price
3. Quality
4. Service
5. Advertising
6. Brand name

Price is a major, although not an absolute market constraint. The apparel market allows premium prices for more fashionable products,

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* Leetham Simpson Ltd. "A Study of Marketing in the Canadian Footwear Industry". January 1972; Volume 1, page V-8.

and general (cost-push) price increases occur, but usually not out of line with industry increases. Price constraints result from the pressure of imports, Canadian retail structure (an oligopsony with four major companies) plus the competition of many small and aggressive manufacturers.

The question of import competition has two aspects. In terms of volume and price, sources from low wage countries are most significant. In terms of fashion, several European countries are important with retailers utilizing this merchandise for their image development, purchasing their volume from Canadian suppliers.

The following apparel purchasing patterns were noted during this study:

- Women's apparel expenditures approximate 50% of total expenditures, with men's 35%, and children's 15%.*

- Women's apparel is purchased more for fashion than is children's or men's, where price and quality is important as well as washability in children's wear.

- With declines in income, or the spectre of rising unemployment, men's apparel expenditures, especially for men's suits, are postponed, with expenditures for women's and children's apparel continuing to a stronger degree.

- With increases in income and economic activity, expenditures in women's apparel rise first.

- The proportion of income spent on apparel increases (to a limit) with increases in income but over time the percentage share declines.

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* The percentage will vary over time reflecting demographic changes. At present expenditures on children's wear are apparel 19% and women's 47%.

APPAREL MANUFACTURING

Approximately 75 percent of all firms in the clothing and footwear industries employ less than 50 people. These industries are fragmented, under capitalized, highly competitive, with the success of the firm usually pivotal upon one man, the owner/manager. Apparel manufacturing has been described by the late Stanley Capelin as follows:

> "To start, the industry is a highly volatile one greatly affected by the vagaries of fashion, weather and price. It operates under stringent deadlines tuned to coincide with sales, promotional and budget schedules of retailers. It is a labor intensive industry, thus placing an extraordinary dependence upon personnel and their skills. It is a business which allows individuals to enter it with little capital - so long as personal sacrifice is substituted. And it places maximum emphasis upon sales competence - virtually to the point of ignoring all other business requirements. The risks, sensitivity, intensive competition and general under capitalization thus combine to create a volatile environment and extreme state of vulnerability. In turn, these conditions place a high premium upon opportunism - the effect of which becomes very significant. For one thing, it causes a state of industrial myopia, the manifestations of which may be paraphrased by the expression "take care of today and tomorrow will take care of itself". For a second, it overemphasizes talent in such areas as design, sales, quality - while paying little attention to how anything is achieved." *

These characteristics aptly describe the clothing and footwear firms I have visited. Manufacturers work enormous hours, operate on the razor's edge between marketing and production crises, with orientation almost totally upon sales.

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* Capelin, S. "Management Revolution"- Southern Garment Manufacturer; August 1970; page 56.

As a result, they have been quick to respond to the fashion explosion, as well as to the growing export opportunities. The small average size of firms in the industry has complemented the merchandising orientation into a flexible operation able to react quickly to fashion changes. The pressure of imports in the low end of the market also has been a major influence in attracting firms to the remaining (fashion) opportunities.

It should be noted that sales increases have been achieved more by the skill than the sophistication of apparel management. As a vice president of the largest apparel consulting firm has noted:

> "Among the major consumer industries (autos, cosmetics, appliances, packaged goods) apparel probably makes the least use of analytical marketing techniques and modern organization. It is the only major industry where intuition and seat-of-the-pants management still receives major credit for a marketing success." *

Apparel manufacturers generally produce in anticipation of receiving orders. They manufacture their fall merchandise during the spring and early summer, and vice-versa. Traditionally there have been two major production seasons: spring (and summer), and the more important, fall (and winter). Interspersed have been lines for resort and cruise wear and specials (back to school, retail promotions, etc.). To illustrate, during the week of August 20, 1972, the following

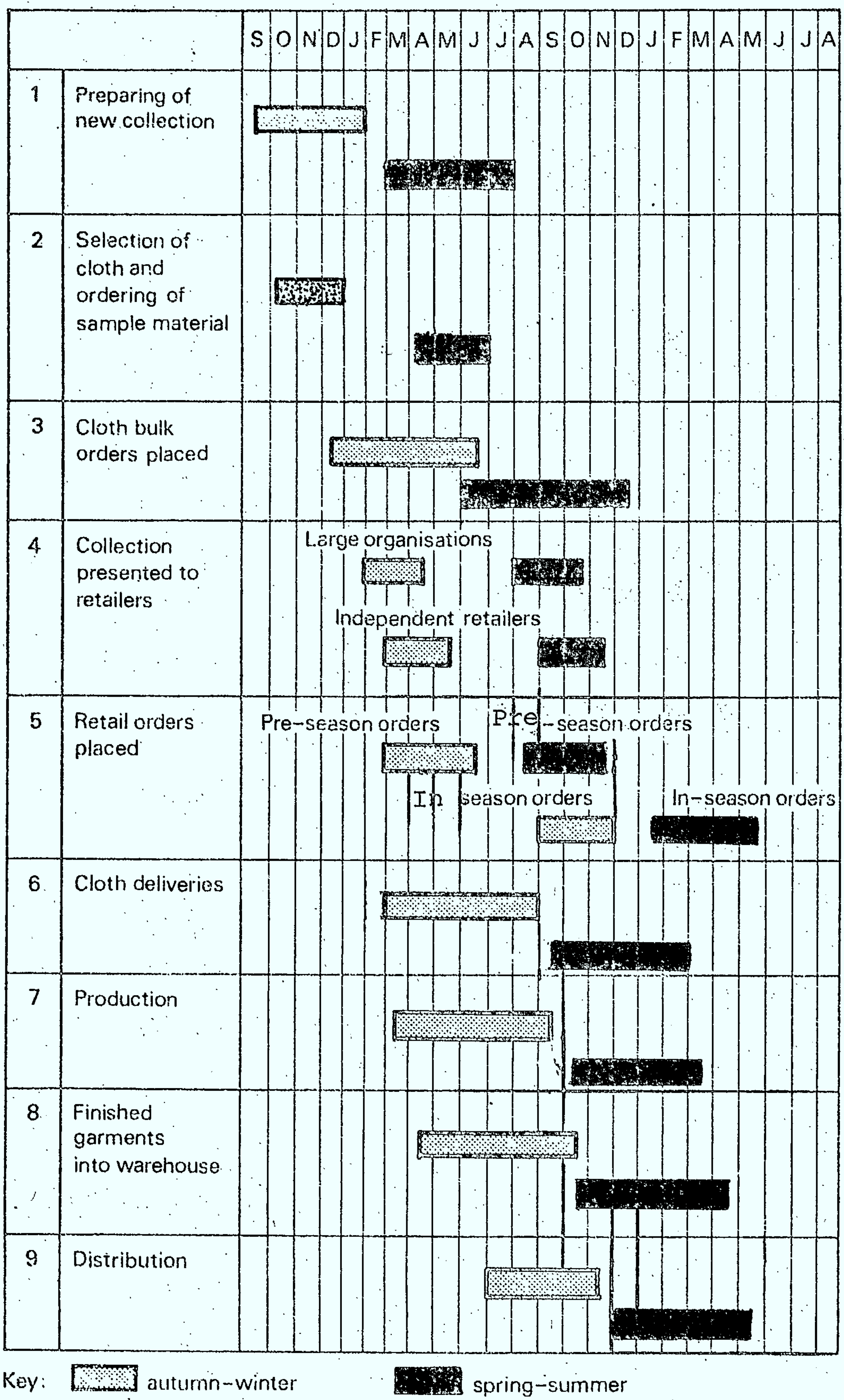
* Ross, R. "Analytical Marketing; Apparel's Last Frontier" Perspective for Apparel Management No. 5 - August 1971; page 1.

major activity occurred within the apparel industry for manufacturers of women's apparel:

Product	Activity
Dresses Sportswear	Opening of holiday lines, plus repeats of fall lines
Coats and Suits	Fall repeats
Hosiery	Holiday peak buying, plus fall and winter repeats
Lingerie	Holiday peak buying plus fall and winter repeats
Innerfashions	Fall and winter peak buying
Accessories	Fall repeats and peak holiday buying
Ski Wear	Preliminary buying
Swimwear	Opening cruise line
Ladies Footwear	Fall and winter repeats and preparing spring 1973 samples
Textiles	Sampling of spring 1973 fabrics
Leather	Spring 1973 repeats

Over a longer time period, and incorporating suppliers, manufacturers, and retailers into the analysis, the current sequence of events in the apparel industries would approximate the following: (see chart next page)

THE TIMING OF APPAREL SEASONS



NOTE: The above is applicable, with minor variances, to manufacturers of men's pants, women's outerwear and children's wear.

IMPLICATIONS OF FASHION ON THE APPAREL INDUSTRIES

> "The apparel industry today has entered a new phase of its existence. One no longer exclaims over six seasons a year; one no longer talks about the men's fashion revolution. Both are accepted as part of the accelerated beat of the times - a staccato rhythm that continues to pound at the apparel world, forcing it to provide a steady flow of new and stimulating items for the insatiable consumer. However, this does not mean that fashion can now be jerked around at will, for recent history has demonstrated that clothing trends must logically evolve with the life-style of the nation."*

The fashion revolution appears to be, for the foreseeable future, a permanent feature of the apparel market. Its characteristic, the short life span of the product, is not unique to this industry, but reflective of an increasing number, including the pharmaceutical, furniture, and electronic industries. With technology breeding technology, combined with the increasing affluence of the population, needs have become more imagined, less real, and thus more vulnerable to the influence of fashion.

To the apparel industry, fashion represents an opportunity to obtain an increasing share of the consumer dollar. It also presents challenges to management unforeseen several years ago. As an illustration, assume the situation of a shirt manufacturer who, until recently, was producing just white shirts. He could buy large volumes of raw material, and plan his production over the year. Today he must produce his shirts in permutations of colour, fabric, collars, fit, pockets, in increasing shorter production runs. In industry vernacular, this manufacturer has undergone a metamorphosis from a 'staple' to a 'style' shop.

The implications of this are considerable, and are assessed from the point of view of:

1. company structure;
2. industry structure;
3. apparel retailers and suppliers.

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* "Clothes" June 15, 1972; page 29

1. IMPLICATIONS OF FASHION ON COMPANY STRUCTURE

With accelerating changes in fashion, a company must organize itself to maximize its flexibility. Very quickly, conflict arises between merchandising and production - merchandising requiring more varied styles in shorter runs, production preferring one style or long runs. Timing is critical - early commitment to produce a style has production benefits, but the risk increases in manufacturing an item not in tune with the current fashion vogue. Too late a commitment can mean that production efficiency will suffer, costly overtime will be necessary, and delivery will probably be late. An important aside is that the fashion revolution created definite advantages for the smaller, inherently more flexible apparel firm. However, this is quickly ending, with large firms applying doses of management techiques and computer technology to reduce their merchandising - manufacturing cycle time to a point competitive with the smaller firms. A more detailed assessment of the differences between style and staple manufacturing is presented on the following table, illustrating the prismatic effect of the fashion explosion on most aspects of an apparel company's operations.

Other things being equal, the fashion effect on an apparel company is to increase cost and reduce productivity. If not corrected, this would further reduce this industry's ability to remain competitive with imports.

MAJOR DIFFERENCES BETWEEN MANUFACTURING STAPLE AND STYLE PRODUCTS

	Production Factors	Key Objectives Staple Manufacturers	Key Objectives Style Manufacturers
1.	Management Concerns	Price of garment Quality of garment	Merchandising (design, marketing) Manufacturing cycle speed plus flexibility
2.	Time	Relatively plenty	Scarce
3.	Inventory Control	Comfortable	No cushion available
4.	Product Continuity	Yes	No
5.	Capital Equipment	Purchased on basis of benefits to price or quality	Purchased on basis of reducing in process manufacturing time and costs
6.	Costing	Once the cost of a basic garment is determined, minor adjustments are made year by year	With no product continuity, no ready comparison with previous garments - each must be costed
7.	Work Scheduling	Large work in-process helps to schedule work	Major problem to maximize use of labour and machinery with frequent changes
8.	Engineering	Reduce costs	Reduce in-process manufacturing time and increase flexibility as well as reduce costs
9.	Production	Ability to work on long runs at accelerated pace	Ability to adjust to new product runs and maintain speed
10.	Financial Management	Major cost variables are predictable	Critical importance in costing garment and assessing value of inventory
11.	Factory supervision	Emphasis on making production workers operate at high speeds	Emphasis on work scheduling and work transfer
12.	Incentive systems	Piece rates determined by time study	Piece rates computed by standard data or time rate
13.	Design department	Patternmaker	Designer, patternmaker

In addition, many items now have to be marked and cut individually instead of in duplicates; there is increased inventory of labels packaging, trim, more complicated billing and inventory controls, and most important, greater need to manage work in-process.

The Seventh Annual Review of the Economic Council of Canada noted that, over the past decade, the apparel industries had the lowest rate of productivity increase of all manufacturing sectors. With the increase in fashion, I suspect that the situation has deteriorated further. I am guided in part by a U.S. study on "The Effect of Style Variation Upon Apparel Manufacturing Costs" which concluded:

> "The design department -- relatively non-existent in a staple shop, becomes an important factor in a style shop. Its contribution to total manufacturing cost can range as high as 3% for experimental and sample garments."
>
> "The cutting department -- integral to manufacturing, can increase costs in terms of man-hour variations by as much as 300% in spreading, 200% in cutting, 300% in shading, and 50% in bundling. Material costs are more difficult to pin-point, but style variation has an ever greater dollars-and-cents impact here."
>
> "The sewing room -- generates costs mainly in unearned pay increments. We have seen that this can vary from an average of 7% in a staple shop to 11% in a semi-style shop, and up to 17.5% in a style operation." *

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* Report of the Technical Advisory Committee, American Apparel Manufacturers Association -- "The Effect of Style Variation Upon Manufacturing Costs;" June 1965, page 29.

2. IMPLICATIONS OF FASHION ON INDUSTRY STRUCTURE

The dominance of fashion in the Canadian apparel industry is considerable, if not complete. This can be illustrated by identifying the major characteristics of the industry from the fashion perspective. For purposes of brevity, the analysis is confined to the clothing industry. A comparable footwear analysis would produce differences in detail, not substance.

(a) Geographic Location

The clothing industry is concentrated totally in the major Canadian consumer markets--Montreal, Toronto and to a lesser degree Winnipeg, and Vancouver. Manufacturers must be on top of the pulse of their major markets, although production facilities need not necessarily be located in these urban areas. Furthermore, the industry must locate at least showroom facilities in the principal retail markets, that is the geographic areas where major retail buyers purchase their requirements. In Canada, this is overwhelmingly Montreal, and to a lesser degree, Toronto.

(b) Amount of Capital Investment

Fashion in the small Canadian market necessitates short and varied production runs and thereby prohibits the efficient adoption of capital equipment normally designed for volume production runs. The greater the fashion element in production, other things being equal, the lower the capital requirements.

(c) Rate of Business Mortality

The gyrations of the fashion cycle create both boom and bust conditions. In a 1950 study of the New York clothing industry, the largest in North America, only 13% of the firms in the women's and children's outerwear sector had been in business for more than 20 years. No similar study has been made in Canada, but the results would appear to be roughly comparable (as anyone experienced in preparing mailing lists in this industry would testify). Business mortality is principally the product of low equity in a firm combined with the requirements for high levels of working capital in critical periods of the year. To illustrate, aggregate working capital (the sum of cash requirements for the receivables and inventory, less payables) may turnover on the average, 4 to 6 times a year in the women's sector and 3 times a year in men's clothing. During each turnover, the firm may develop a liquidity problem, and if sufficiently critical, will become insolvent.

(d) Industry Structure

The uncertainty surrounding consumer acceptance of a particular fashion encourages small scale units. The larger the unit, the more inventory a firm must carry in semi-finished and finished goods, and thus the more susceptible it is to fashion changes. The average size clothing company in Canada has about 60 employees, while in the more fashion-prone women's sector, it is 43 employees per establishment.

(e) Merchandising Strategy

Fashion is a major competitive device used by apparel manufacturers to differentiate their products, not only from rival firms, but also from their own previous offerings. The result is that competition is concentrated more on design and quality and less on price, allowing a small clothing manufacturer who has a particularly successful item, some degree of market power in the short term.* Since style pirating is commonplace, manufacturers cannot maintain their edge for long. Their successful numbers are rapidly faced with price competition from both domestic and foreign sources, and as a result, they must move into newer fashions.

(f) Seasonality

The clothing industry is highly seasonal, as production swings with the climatic requirements of spring, summer, fall and winter. The two major production seasons are fall and spring, with Canadian manufacturers enjoying an international reputation in fall merchandise,

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* In economic parlance the demand curve for his product shifts upward and to the right for a product currently in fashion.

and particularly outerwear. This creates employment swings, and in the Canadian clothing industry for 1970, there was a 6.5% variation between high and low employment levels, with the variation 13.2% in the women's sector, 10.5% in the children's and 4.2% in men's component. For Canadian manufacturing as a whole, the variation was 5.3%. This seasonality also encourages the industry to locate in large urban centres where adequate reserves of skilled labour can be obtained on short notice.

(g) Distribution Channels

The primacy of fashion necessitates rapid delivery of finished goods to retailers, and piece goods from textile mills to the manufacturer. The combination of time constraints, light weight and low bulk per unit value merchandise force the use of relatively high cost transportation methods such as air freight. Structurally, this has meant virtual elimination of wholesalers and distributors, with manufacturers shipping directly to the retailer, and with major chains, directly to the particular store.

3. IMPLICATIONS OF FASHION ON APPAREL RETAILERS AND SUPPLIERS

(a) Retailing

Significantly, the number of seasons has increased, while the length of each season has decreased, as both the retailer and manufacturer attempt to cushion the risks from fashion uncertainty. Instead of the traditional four seasons, many firms have six. Even then, there are so many early or late specials in addition to the regular offerings that the seasonal concept has blurred into one big season.

The volatile nature of the fashion market has made it difficult to anticipate trends. Retailers, not wishing to be caught with surplus merchandise that suddenly could become commercially obsolete, have resorted to taking smaller opening positions with manufacturers. When the style starts 'running', the request comes for large repeat orders, which a manufacturer must increasingly service from his stock. This means that the responsibility of correctly forecasting fashion demand has been shifted almost totally upon the manufacturer, as a result of the declines in pre-season order positions. This has lead to two important merchandising developments in the Canadian apparel industry. With 3,000 apparel firms in Canada, and the growing need for assured delivery and style capability, major retailers have recently completed a program of identifying key suppliers. They are recognized as having a favourable history of delivery, style, quality, and commercial success, with the stores expressing their intent to deal with them on a preferred basis. Increasing numbers of these manufacturers, particularly brand name, advertised merchandise, significantly have taken the liberty of shipping limited initial orders to these stores, without the retailer having seen the merchandise. This reduces the apparel merchandising cycle time even further for those favoured manufacturers.

Of some interest is the trend for apparel manufacturers to open small retail establishments, often on their own premises, to sell seconds, samples, odd sizes and generally items declining in fashion appeal.

(b) Suppliers

Clothing firms purchase (hopefully on an exclusive basis to their company) fabric from textile mills and leathers from tanners. Suppliers are interested in as large an early commitment (position) as possible, while the apparel industry prefers one that is small and late as a hedge against fashion changes. To anticipate the demand from the apparel industry, suppliers have to watch consumer trends closely. The general situation is presented by the following excerpt from the 1972 Annual Report of the Chairman, Canadian Textiles Institute:

> "Fashion has always been synonymous with change; accelerated pace makes changes more obvious. Primary producers are the beginning of the fashion chain, the principals in a two-way flow of information from mill to consumer and back, so they get early indications of market changes. Knitters particularly must play very close to the consumer market.
>
> "The extent of speeded-up fundamental change is best exemplified by one of Canada's largest textile firms

> which in the past five years has seen 40% of its apparel fabric lines change!" *

Knitted as against woven fabrics have grown rapidly in popularity. Apart from their own fashion appeal, they do present many benefits to a clothing manufacturer wishing to react more quickly to a fashion change. The lead time required to obtain knitted fabrics is 1/3 of that required for woven fabrics (2 months as against 6 months). In addition, relatively smaller orders are economical.

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* Picard, J.H. C.T.I. Chairman's Annual Report - Canadian Textile Journal; November 1972; page 15.

CONCLUSION

Fashion is by nature transitory, although not in terms of its importance to the apparel industry and the Canadian consumer. To apparel manufacturers, fashion presents the opportunity to compete against low-cost imports and obtain a better price for their merchandise. For the consumer more varied and exciting apparel is possible, offering greater opportunity to express one's individuality. Since 1967 the fashion tempo has increased. This, I suspect, has led to a deterioration in an already low level of industry productivity. It has also increased the requirements for fashion design in the apparel industry, the subject of the next chapter.

CHAPTER 11

AN ANALYSIS OF FASHION DESIGN IN THE CANADIAN APPAREL INDUSTRY

The increased requirements for fashion necessitate correspondingly greater amounts of fashion design. This may vary from copying to originality. It may require a firm to retain the services of a fashion designer. If more designers are required, are existing educational facilities training sufficient numbers? These points are the subject of this chapter.

DESIGNER

The apparel manufacturing process starts with the design of the new product. In the larger firm, this responsibility is the designer's. The designer blends the art and science of apparel manufacturing into a saleable product. Design creation is an art form; manufacturing is a science. Design creativity must operate within the market and production constraints of the manufacturer, and be in harmony with current fashion trends. Market constraints generally refer to the price range at which a company is aiming its product on the retail level: (i.e. $10.95 - $19.95 boy's pants). The designs also must be compatible with the company's machinery. A design should not be so radical that in producing 100 units of it, the company could have manufactured 1,000 units of another style (at approximately the same price). Machines cannot normally be purchased for one design, nor can such items be produced that call for pockets over seams, without causing considerable havoc.

A good design is both functional and aesthetically pleasing. The latter is a principal concern, the former is generally assumed. It is a commercially acceptable blend of art elements and design principals. Art elements reflect questions of line, form, colour, and texture. Design principles pertain to balance, proportion, dominance and rhythm.

Design inspiration frequently starts with the fabric. Further stimulation comes from what people are wearing "on the street", and the trends in other products or geographic areas as reported primarily by fashion magazines. A good designer filters these ideas through a developed fashion sense, i.e. a sensitivity of the readiness or reluctance of a particular group of consumers to accept a given look or idea. A second filter, repeated for emphasis, is that design must also conform with the production and marketing constraints of an apparel manufacturer.

A designer's responsibilities vary according to the size and requirements of a company, and the skill of the individual. The key elements include the following:

DESIGNER JOB DESCRIPTION

- maintains continuous exposure to style influences, fashion magazines, and the media;
- reviews design requirements with the owner/manager or merchandise manager;
- prepares design sketches;
- develops an original sample, makes an original pattern and cuts the sample;
- supervises the assembly of the sample;
- makes modifications as required to take into account production and market restraints;
- interprets the design for the patternmaker;
- supervises the work of the patternmaker (and possibly the grader).

The designer's craft is to mold a flat surface to fit a curved shape. This is done through patternmaking, by the flat pattern technique, or by the less popular method of draping. The former involves drafting pattern pieces on paper. All variations of a standard size pattern can be laid out flat. Thus the name of the technique and its advantage. Draping is generally restricted to high priced women's clothing, and involves pinning a fabric to a dress form, and trimming it into shaped pieces.

After a sample is made up, there is usually considerable "give and take" between the designer and the manufacturer, or those responsible for merchandising and production. Frequently there is too much "overkill" in the design that makes it either too expensive to sell or difficult to produce, and meetings are held in an attempt to work out these constraints. A few outstanding firms have the designer submit each sample to the plant engineer or production manager, where an estimated retail price/gross margin is established. The designer learns the basis of these estimates and thereby guides himself accordingly in preparing designs for each price point along the product range.

PATTERNMAKER JOB DESCRIPTION

- receives instructions from designer;
- makes and cuts sample pattern;
- reviews sample pattern with designer;
- grades patterns into sizes (depending on volume this could be a full time job).

In the smaller firm the duties of a designer and/or patternmaker are combined, or assumed by the senior manager/owner. In addition, they may include the buying of fabrics, trim, belts, buckles, findings, as well as commenting upon proposed machinery acquisitions.

SURVEY OF FASHION DESIGN

To ascertain the level of original fashion design in Canada, and the supply and demand situation for fashion designers, a company interview program was initiated. Personal interviews were held with senior management and resident designers in all major industry sectors and geographic areas. This totalled 178 firms in the clothing industry, and 52 in the footwear industry. Discussions were also held with retailers, educational officials, association directors and government officials. The general procedure was to meet with an executive director, and have him identify a cross section of his membership incorporating the major industry characteristics - small, medium, large; high style, staple; high price, medium price; manufacturers of stock or to order. A description of the areas and industries surveyed is provided on the table on the following page.

ANALYSIS OF SURVEY COVERAGE

Geographic Areas

City	No. Visited	Percent
Vancouver	16	7
Edmonton/ Calgary	11	5
Winnipeg	30	13
Toronto/ Hamilton	88	38
Montreal	62	27
Quebec City & Region	23	10
TOTAL	230	100

Industry Sectors*

Clothing	No. Visited	Percent
Men's	66	37
Women's	54	31
Children's	24	13
Fur	23	13
Foundation	11	6
TOTAL	178	100
Footwear		
Men's	25	48
Women's	19	37
Children's	8	15
TOTAL	52	100
Apparel		
Clothing	178	77
Footwear	52	23
TOTAL	230	100

Product Groups

Fine Clothing

Coat and Suit

Dress and Sportswear

Outerwear

Uniform

Shirt

Swimwear/Skiwear

Footwear

- men's
- women's
- children's
- boots and shoes
- slippers

* With wide and multiple product ranges, judgement was required in allocating companies to these categories and prevented a meaningful statistical analysis of "Product Groups" (Column 3)

Apparel manufacturers have stated their desire to hire pattern-makers in response to questions on their requirements for fashion designers in light of increased design activity. They prefer to handle the design creation aspect themselves, initially delegating the more technical aspects to the new employee, and eventually transferring most of the responsibility, once assured of the employee's ability, loyalty and knowledge of his market and production constraints. This is understandable in that designs must, above all, be sold. Designers therefore require knowledge of their company's price points, major customer preferences, competitors, as well as manufacturing (machinery) capability.

The major constraints to more original fashion design in the Canadian apparel industries are not the quality or quantity of fashion designers, or conservatism in consumer/retailer buying habits. The key is that there are too many, too small companies that cannot support (at attractive wages) the services of a designer, and equally important, promote their name or work. Of the 3,000 apparel firms, approximately 400 have annual sales in excess of one million dollars. Most firms start requiring design personnel at the annual sales range of \$750,000 to \$850,000 at a point where a company can afford the overhead and when the pressures have become excessive for the owner/manager to continue alone with the design function. A firm should be in the $2.5 to $4 million range before it could support original design promotion. Less than five percent of Canadian apparel firms have reached or exceeded that level. A major exception is manufacturers of high priced women's wear, who have both sufficient price flexibility and strong competitive pressures to incur these expenditures at lower sales levels. The dictum that only large firms can support designers has been substantiated to a degree by the Leetham Simpson Study of the Canadian footwear industry.*

My general observations on the fashion design situation are as follows:

a) Additional design has been produced primarily through increased efforts of the owner/manager.

b) There has been a reluctance to hire designers in small companies because they are not as familiar with the major customers, production and marketing constraints and competition from other manufacturers. With much of the limited capital of the firm tied up in stock and raw material, to produce on the basis of the whims of a designer is a risk the smaller company cannot afford. A good designer can also be a problem to a firm in another way, as Gordon Cohen, one of the leading men's designers has noted:

"The designer's creativity can be a problem, not

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* Leetham Simpson - A Study of Marketing in the Canadian Footwear Industry; January 1972; Volume 1; page V-23.

> because it does not fit the system, but because it ignores it. The creative individual achieves his heightened awareness of some aspects of his life by ignoring other aspects. And since the aspects he ignores are often precisely those routine matters on which the system lavishes loving attention, he can hardly be characterized as the ideal organization man" *

(c) The volume and price points under which most manufacturers operate do not necessitate the degree of originality that the high price points require. The major originality comes in the choice of the fabric or leather, where the attempt is made to acquire raw materials on an exclusive basis to their company. New design for many firms consists of changing the fabric of a few good selling new numbers from a previous season and modifying the flare of the pant or width of the lapel, or the addition of a belt or buckle, to take into account major fashion changes.

A few numbers are frequently added into the line to give it some "pizzazz", but generally the manufacturer has no intention of producing or promoting these more original numbers.

(d) In the apparel market, manufacturers are quick to spot trends. They are ready to "knock off" designs originating from other sources. This situation has been stabilized to a large degree by volume retailers selecting preferred accounts who have a history of fashion sense, quality manufacture plus good service, over other manufacturers who

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* Cohen, G. "A Designer Looks at the Explosion in the Needle Trade Industry." Address to the N.T.M.A.; October 20, 1970; page 1.

can, in time, provide similar merchandise at lower prices.

(e) Particularly in the more volatile fashion areas of women's apparel, tie-ups, primarily with U.S. companies, are common. For a few thousand dollars, a manufacturer can receive the benefit of design studios having budgets of thousands of dollars. Depending upon the arrangement, he can obtain the desired patterns or lasts, and most significantly and often overlooked, he can purchase from the U.S. company materials and trimmings that have been obtained on an exclusive and volume basis. However, during the survey, the trend to withdraw from licence arrangements was noted particularly in the women's dress and sportswear sector, because:

- licence costs are rising;
- major retailers go directly to U.S. sources;
- U.S. design does not adequately meet Canadian consumer preferences.

(f) Original design involves the combined efforts of the designer's skill, the manufacturer's resources, and the support of the retailer/consumer. Its success necessitates investment by a growing number of retailers and manufacturers in the medium to better priced product categories. A retailer must invest a portion of his window space/floor space to a new look, so that the consumer can adjust to, and hopefully accept, the new offering. A manufacturer must be prepared to advertise, promote, perhaps do some market research, and even lose (occasionally).

Original fashion design is to the apparel industry what research and development is to the hard goods industry. One invests in original design as one extends the fashion market into newer, hopefully, more artistic horizons. Canada has much to gain through encouraging more firms to reach this plateau, both in terms of a more competitive industry providing increased employment opportunities for our creative talent, as well as adding to our national identity through a more distinctive world fashion image.

GENERAL OBSERVATIONS ON FASHION DESIGN

The following general observations were conveyed to me relating to the pace of fashion design:

- the greatest receptivity to new design is in Montreal, followed increasingly more closely by most other cities, with some exceptions;
- it is highest in the women's industry, followed by the men's, children's, foundation and fur industries;
- it is most evident in the dress industry, significant in most products, strong in outerwear, relatively limited in men's pants (essentially fabric change) and uniforms (although 'career apparel' is improving);
- there is more design in export orders than the average domestic order;
- it is more important in the higher price ranges;
- it is greater in urban than in rural areas;
- within the retail structure, the upward progression of design is as follows:

  discount stores, department store basements, department stores, independent and specialty stores, boutiques, couturiers.

The major conclusion is that Montreal is the key to the Canadian fashion design picture. It leads in terms of consumer design acceptance (as well as having the length and strength of the apparel industry within its confines). As a result, most apparel manufacturers across Canada keep a close eye on consumer trends in Montreal as a possible leading indicator of fashion design acceptance elsewhere.

The progression of fashion design, with companies and industry sectors can be classified as follows:

THE DESIGN HIERARCHY

	Description	* Design Staff
Level One	Independent Creation**	Designer, Patternmaker - Design Consultants - Couturiers
Level Two	Creates by adapting fads or fashions	Designer, Patternmaker
Level Three	Buys samples and copies, plus carryovers	Patternmaker
Level Four	Licence part of line, copies, carryover with new fabrics	Patternmaker
Level Five	Licence total with some special lines	Usually done by the owner/manager

* Varying with the size of companies.

** There may be a definitional problem with the word "independent creation." No fashion can truly be independent, fashion being like a cork in a stream. This refers to whether the major design stimulus for a company is internal and innovative.

It would be simplistic to qualify fashion design in Canada in any one of the aforementioned categories because:

- It varies widely between product groups, industry sectors, geographic areas, and price ranges;
- It varies according to market conditions, with the current bullish market situation favorable to more creativity;
- Within the product line of most companies, portions may be ascribed to several categories.

However, one can conclude that very few companies are at Level One. Level Five, total licencing, is on the decline for reasons mentioned.

Despite these difficulties, quantifiable standards should be established. It has been previously suggested that more original design in the apparel industry is like research and development in the hard goods industry. It is considered an investment. Good companies allocate 5% of sales to research and development (the figure varies). A similar percentage is recommended for individual apparel firms. The estimated industry average is 20% of that level, with a higher ratio for larger firms.

With the high incidence of smaller firms in the apparel industry (85% of the total) the industry lacks the economic clout to support or sustain more original fashion design. The implications to the footwear industry have been, in part, an alarming increase in imports. After examining the operations of 41 Canadian footwear manufacturers, the Leetham Simpson Report recently observed:

> "The problem with style is that most manufacturers "knock-off" other people's style ideas. This means that the copier is relegated to a "second coming", lower

profitability role geared to a smaller order requirement. The company which does well is the one which by good luck or good planning, is able to come up with "hot" style innovations at frequent intervals. This company is in step with the fashions, not running a season or two behind and in consequence has a full order book, longer production runs, and better customer acceptance. How can the Canadian manufacturer get into this happy position?

"It is apparent from the field survey that:

1. The footwear business has become highly fashion oriented.

2. Styles are faster and the traditional two-season approach is giving way to a four-season or more approach. Some companies are talking of one continuous season, others say that footwear is becoming an item business.

3. At this point in time, most new style ideas originate in Europe.

4. In small or medium sized Canadian firms, styling and design are carried out by the proprietor, president, the marketing manager or somebody who has other responsibilities than style alone."

"For Canadian firms to narrow the gap relative to imports, they must be able to relate to the fashion pulse and adapt rapidly to changing styles. They must be able to introduce new ideas ahead of or not later than importers."

"In a few years' time, it may be possible to develop a Canadian style which will gain international recognition. This is a long-range programme to be undertaken by the industry in collaboration with other industries in the apparel field - to develop a "Canadian Look." *

* Leetham Simpson Ltd. "A Study of Marketing in the Canadian Footwear Industry" - The Canadian Market - Volume 1, Page VI - 19.

ANALYSIS OF THE SUPPLY AND DEMAND FOR FASHION DESIGNERS

The demand (need) for designers is based (derived) initially on the market requirements for more fashion and specifically on the company requirements for more original fashion design. Up to this time, the increased requirements for fashion design, resulting from the fashion explosion, have been largely met by the additional efforts on the part of the owner/manager. Nonetheless, the requirements for fashion designers have increased, and are expected to continue to do so.

A large, but declining proportion, of the designers' positions have been filled by recent immigrants. I would estimate that between 40-50 percent of the resident designers interviewed have been in Canada less than 10 to 15 years. These designers have obtained their training/experience largely in England, Germany, Italy and the United States. Employers favour recent immigrants over Canadian students because, in general terms, they are experienced, better trained in patternmaking, and less prone to leave the company. Recent graduates from Canadian design schools are, in comparison, younger, inexperienced, and have less technical skills. Salaries requested by both groups are comparable.

REQUIREMENTS FOR FASHION DESIGNERS

The annual requirements for fashion designers is estimated to be as follows, reflecting both increased industry need plus replacement from turnover:*

	Clothing	Footwear	Total Apparel
Quebec	45	10	55
Ontario	20	4	24
Other	5	-	5
	70	14	84

This demand is expected to be filled from the following sources:

- 70% – Canadian Schools of Design
- 20% – Immigrants
- 10% – 'Bursary' students returning from International Schools of Design

Thus the total annual requirement for designers from Canadian design schools is 60. Assuming turnover within schools, the desired level of students graduating annually is 85.

It is difficult to ascertain the number of fashion designers entering the labour market annually from community colleges, independent colleges, university home economic faculties, agricultural colleges and private or commercial colleges. The estimate would be 300 "designers", with an equal number of merchandising graduates who have had some design training.

* According to a special analysis of the 1961 Census requested by this author, the stock of Canadian apparel designers was estimated at 1,130, with turnover from the industry (not individual firms) assumed for the analysis to be 1% per annum.

SCHOOLS OF FASHION DESIGN

During the course of this analysis, I visited most of the educational facilities in Canada offering courses or programs in fashion design. I feel that it would be improper to make a quality assessment of any particular school. I was impressed with the ability and zeal of many of the teachers, and in the case of Ontario, with the lavish premises. I expected and therefore was not surprised that most schools were receiving little industry cooperation in terms of serving on advisory committees or allowing plant visits.

I had the opportunity of inspecting four design schools in New York, including the Fashion Institute of Technology, Parsons, Traphagen and Pratt. I consider the Fashion Institute of Technology the finest school of its kind. It meets most of the following requirements which I feel a design program should have:

1. Admission Requirements - Too many students are allowed entry into design courses without having discernable creative abilities, although they meet educational requirements. The argument is shallow that because a person is a taxpayer, he is entitled to attend any course. It is further complicated by the fact that with a per capita grant scheme, there is an incentive for schools not to turn away students. A selection procedure should be established, involving local manufacturers, where talent is assessed, and the probable employment opportunities and working conditions conveyed.

2. Course content - I believe that public courses should be of a three year duration following high school graduation or equivalent. The first year of the course should be a combined fashion design, fashion merchandising program, with the two programs separated in the second year. In year two, intensive training in patternmaking is recommended. During the final year, a portion of the first semester should be allocated to training-in-industry (see Recommendation Four). The second semester should be case work, where students are offered practical design assignments reflecting a variety of industry and product sectors, with industry representatives coming each second Friday to comment upon whether the designs are marketable, or manufactureable.

3. Specialization - Almost all schools of design are oriented towards the women's wear industry. Some schools should develop a specialization in men's wear, children's wear and footwear.

4. Expenditures - It is somewhat wasteful for each public school to have abundant supplies of comparable equipment. Schools seem well endowed with a variety of textile testing machinery which, but for one example, could be purchased by one college for use by all in the area. Suggesting that public colleges cooperate, I recognize, borders on the naive, but the point, I feel, should be made.

Another comment I feel warranted is that the schools in a province should jointly finance a competition for graduating design students, during which time, manufacturers would be invited to attend and hopefully hire some of the graduates (see Recommendation Three).

CANADIAN SCHOOLS OF FASHION DESIGN

ALBERTA

UNIVERSITY OF NORTHERN ALBERTA,
Department of Home Economics,
Edmonton, Alberta. T6G 2E1

** OLDS AGRICULTURAL & VOCATIONAL COLLEGE,
P.O. Box 760,
Olds, Alberta. TOM 1PO

BRITISH COLUMBIA

A.B.C. DRESS DESIGNING SCHOOL,
409 Cambie Street,
Vancouver, British Columbia.

** BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY,
3700 Willingdon,
Burnaby, British Columbia.

LYDIA LAWRENCE FASHION INSTITUTE,
974 Broadway Street,
Vancouver, B.C.

* ROYAL ROADS CANADIAN SERVICES COLLEGE
Department of Textiles,
Victoria, British Columbia.

UNIVERSITY OF BRITISH COLUMBIA
Department of Home Economics,
Vancouver, British Columbia.

* VANCOUVER CITY COLLEGE
1595 W. 10th Avenue,
Vancouver, British Columbia.

VANCOUVER SCHOOL OF ART,
249 Dunsmuir Avenue,
Vancouver, British Columbia.

BRITISH COLUMBIA ACADEMY OF FASHION DESIGN,
470 Granville Street, Rogers Building,
Vancouver 2, British Columbia.

MANITOBA

UNIVERSITY OF MANITOBA;
Faculty of Home Economics,
Winnipeg, Manitoba R3T 2N2

NATIONAL SCHOOL OF DRESS DESIGNING,
633 Flemming Street,
Winnipeg, Manitoba. R2K 1V2

** RED RIVER COMMUNITY COLLEGE,
2055 Notre Dame Avenue,
Winnipeg, Manitoba. R3H 0J9

NEW BRUNSWICK

MOUNT ALLISON UNIVERSITY,
Department of Home Economics,
Saskville, N.B.

NOVA SCOTIA

ACADIA UNIVERSITY,
Department of Home Economics,
Wolfville, Nova Scotia.

MOUNT ST. BERNARD UNIVERSITY,
Department of Home Economics,
Antigonish, Nova Scotia.

MOUNT SAINT VINCENT UNIVERSITY,
Department of Home Economics,
Halifax, Nova Scotia.

NOVA SCOTIA COLLEGE OF ART AND DESIGN,
6152 Coburg Road,
Halifax, Nova Scotia.

ONTARIO

CANADORE COLLEGE OF APPLIED ARTS,
Home Economics Department,
P.O. Box 5001,
North Bay, Ontario. P1B 8K9.

CENTENNIAL COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
651 Warden Avenue,
Scarborough, Ontario. M1L 3Z6.

GALASSO SCHOOL OF FASHION DESIGN,
452 Danforth Street,
Toronto, Ontario.

GEORGE BROWN COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
P.O. Box 1015, Station "B",
Toronto 2B, Ontario.

HUMBER COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
P.O. Box 1900, Humber College Road,
Rexdale, Ontario. M9W 5L7.

NIAGARA COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
Woodlawn Road, P.O. Box 248,
Welland, Ontario. L3B 5R4.

UNIVERSITY OF GUELPH,
College of Family & Consumer Studies,
MacDonald Institute Building,
Guelph, Ontario. N1G 2W1.

UNIVERSITY OF WESTERN ONTARIO,
Home Economics Department,
London, Ontario. N6A 3K7.

LA MAISON FRANCAISE ACADEMY OF DESIGN,
127 Davenport Road,
Toronto, Ontario. M5R 1H8.

* MOHAWK COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
135 Fennell Avenue West,
Hamilton, Ontario.

* RYERSON POLYTECHNICAL INSTITUTE,
50 Gould Street,
Toronto, Ontario. M5B 1E8.

* ONTARIO COLLEGE OF ART,
100 McCaul Street,
Toronto, Ontario. M5T 1W1.

ST. LAWRENCE COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
P.O. Box 6000, Van Order Drive,
Kingston, Ontario. K7L 5A6.

SENECA COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
1750 Finch Avenue East,
Willowdale, Ontario. M2N 5T7.

* SHERIDAN COLLEGE OF APPLIED ARTS AND TECHNOLOGY,
1430 Trafalgar Road,
Oakville, Ontario. L6H 2L1.

SIR SANFORD FLEMING COLLEGE,
P.O. Box 653, 526 McConnell Street,
Peterborough, Ontario. K9J 7B1

** SHAW COLLEGES,
Fashion Merchandising Department,
2536 Yonge Street,
Toronto, Ontario. M4P 2H4

PRINCE EDWARD ISLAND

PRINCE OF WALES COLLEGE,
Department of Home Economics,
Charlottetown Prince Edward Island.

QUEBEC

ECOLE DE COUPE COTNOIR CAPPONI,
2135 rue Guy,
Montreal, Quebec.

ECOLE DE COUTURE LARIN ALYNE ENRG.,
384 est, Boul. St. Joseph,
Montreal, Quebec.

ECOLE DE COUPE & COUTURE FRANCE AUGER,
4192, rue St. Andre,
Montreal, Quebec.

ECOLE DE COUTURE JEANINE,
6073, rue Renoir,
Montreal, Quebec.

ECOLE DES METIERS COMMERCIAUX,
1097, rue Berri,
Montreal 131, Quebec.

ECOLE THERESE GAUTHIER INC.,
4510, rue de la Roche,
Montreal, Quebec.

ECOLE DE COUPE & COUTURE CHALIFOUR,
9904 boul. St. Laurent,
Montreal, Quebec.

ECOLE DE COUTURE GONTHIER A.,
35, rue St-Jean,
Longueuil, Quebec.

ECOLE DE COUTURE POIRIER MADELEINE,
8834, rue Berri,
Montreal, Quebec.

* INSTITUT DES TEXTILES
2255 boul. Laframboise,
Saint Hyacinthe, Quebec.

** LASALLE COLLEGE,
Fashion Merchandising Department,
2015 Drummond Street,
Montreal 107, Quebec.

SASKATCHEWAN

UNIVERSITY OF SASKATCHEWAN,
Clothing & Textiles Department,
College of Home Economics,
Saskatoon, Saskatchewan. S7N OWO.

* Textile Courses
** Merchandising Courses

MAJOR SCHOOLS OF FASHION DESIGN OUTSIDE CANADA

New York	Fashion Institute of Technology Parsons School of Design Traphagen School of Design Pratt Institute of Technology
London	Royal College of Art London College of Fashion St. Martin School of Art Hornsey College of Art
Paris	Ecole de la Chambre Syndicale de la Couture Ecole Guerre-Lavigne Ecole Pratique et Moderne Jeoffrin J. Byres International School of Fashion
Rome	Centro di Moda Italanio

MAJOR SCHOOLS OF FOOTWEAR DESIGN

The Cordwainers Technical College
London, England

Ars Sutoria Institute,
Milano, Italy

Europiasches Bildungsforum des Schuhhandels
West Germany

Northampton College of Technology
Northampton, England

Pratt Institute of Technology
New York, U.S.A.

CHAPTER III

RECOMMENDED DESIGNER DEVELOPMENT PROGRAM

This report was commissioned, and recommendations provided on the assumption that a greater level of design creativity correspondingly improves the competitive ability of the Canadian apparel industry. The assumption, I believe, is valid. Consumers are willing to pay premium prices for more fashionable apparel, even in the face of lower priced, frequently imported, merchandise. Canadian firms are better prepared to capitalize upon domestic fashion trends, and with the higher prices received, compensate to a degree the higher costs of doing business in Canada.

The major threat to the Canadian apparel industry continues to be imports. At present they comprise, in value terms, 16 percent of the clothing market and 25 percent of the (leather) footwear market, with 1972 increases frightening.

The major volumes of apparel imports have generally been low priced and inferior styled. The problem is that not only have the quantity of imports continued unabated, but also their fashion content has improved considerably.

A positive challenge to imports is a strengthened apparel industry producing more original fashion design. Canadian firms could increase their style capability, move into the medium to better price categories where fashion, not price, is the major market factor, and vacate the low end of the market to imports. To a large degree this realignment has been achieved, but at the cost of decreased industry productivity.

The Canadian fashion market, based on the results of this study, can absorb increased volumes of fashion apparel. Specifically:

- consumers are knowledgeable about, are attracted to, and assuming sound management of the Canadian economy, will continue to have the capability to spend more on fashion apparel;
- retailers are quite sophisticated in presenting fashion and enticing sales;
- there is no shortage of creative people wishing to pursue design careers in the apparel industry, although there are deficiencies in current training methods;
- the fashion media appears adequate in transmitting the fashion message, although newspapers, magazines and trade papers should be allocating more copy on Canadian, as against European designs (and receive more advertising from Canadian apparel manufactures);

The outstanding deficiency limiting original fashion design is the fragmentation of the Canadian apparel industry. There are too many small companies. If you define a company with less than annual sales of one million dollars as small, then 85 percent of the apparel firms are included. Small firms cannot afford the design overhead and are not in a position to develop and promote more original design.

There are not enough large firms to take full advantage of the potential in the Canadian fashion market. By size, though, it is not that apparel dinosaurs are recommended. The most profitable apparel companies appear to be those that operate under a central umbrella over several semi-independent operations. With size comes greater fashion resilience (risks are spread), increased leverage with suppliers and financial institutions, ability to mount national advertising campaigns and purchase the latest technology and in this matter to support more original fashion design. A first priority should be a potent industrial development policy to stimulate mergers and increased productivity in the Canadian apparel industry.

DESIGNER DEVELOPMENT PROGRAM RECOMMENDATIONS

Specific recommendations are offered to increase the level of qualified fashion design talent in the Canadian apparel industry. There are two major approaches:

1. upgrading the skills of present employees in the industry;
2. increasing the technical skills of prospective designers.

There are also budgetary constraints which have been taken into consideration in the formulation of the following program. Specifically they include the following:

- the federal government appears prepared to support only a modest increase in expenditures in the Fashion Design Assistance Program;
- the provincial governments (Quebec, Ontario, Manitoba, British Columbia) have shown reluctance to make other than modest commitments to a national fashion design assistance program;
- the apparel industry is fragmented, influencing the type of program and possible financial support;
- the need to increase original design is not top priority among apparel industry needs. It ranks high, but behind the requirements for middle managers and apparel engineers.

The major findings of this study of fashion design are as follows:

- the number of graduating students exceeds industry requirements, with the disturbing feature that further expansions are planned in Ontario (where the imbalance is the greatest);

- training offered students should be of longer duration, with some attempt at industry specialization, including men's wear, children's wear and footwear;
- existing courses in patternmaking, as part of fashion design courses, should be upgraded considerably to meet industry requirements;
- courses should include some exposure to the production and marketing constraints facing a manufacturer, particularly designing within imposed price points, and utilizing only restricted types of machinery;
- manufacturers are not generally aware of the availability and quality of students emanating from public schools and colleges.

There are other findings, which, for presentational purposes, are included in association with specific program recommendations.

A Designer Development Program is recommended, comprising the following three elements:

A. Educational

B. Promotional

C. Developmental

In order of priority the ranking, I suggest, would be promotional, followed by educational and developmental.

A. EDUCATIONAL

Within Canada, and particularly in Quebec, Ontario, Manitoba, Alberta and British Columbia, there are a variety of schools offering an initial exposure to fashion design. Many gifted students graduate from these programs and require further training to develop their creative abilities more fully. There is no institute in Canada available for post-graduate training in fashion design. The major apparel producing countries of the world have such facilities, including the United States, United Kingdom, France, Eire, Israel and Japan. Such a facility could also establish accreditation standards for designers, develop seminars, and provide advice to design schools across Canada. The need for such a facility has long been recognized by the fashion press, manufactures, the Leetham Simpson Report, and educational officials. It should be located in Montreal which harbours the length, strength and fashion vibrance of the Canadian apparel industry.

RECOMMENDATION ONE: A NATIONAL SCHOOL OF FASHION DESIGN IN MONTREAL

There will be a continuing need to offer scholarships for gifted students. Fashion is international in today's global village. A student can learn much by attending the top design schools located in the fashion centres of the world, including Paris, London and New York. At present $12,500 is spent annually by the Apparel and Textiles Branch, Industry, Trade and Commerce for this purpose, with four students selected in 1972. My recommendation is that the number of recipients be increased to six, with a minimum of one scholarship available annually for a student wishing to pursue a career in footwear design.

RECOMMENDATION TWO: A SCHOLARSHIP PROGRAM

Industry should be intimately involved in the designer development program. In the educational area, apart from serving on Advisory Committees for design schools, it is recommended that they participate in annual provincial design competitions. What is proposed is a fashion show limited to the graduating students from design schools in a province. Manufacturers would be encouraged to attend and defray most of the production costs through inflated admission charges. The benefits would vary from one extreme where manufacturers would become more aware of the activity and calibre of design schools, to the other extreme where job offers would be made. To add to the event, the designer selected as the most talented, by a vote of attending manufacturers, should receive top priority in consideration of a design scholarship. For purposes of equity, two should be made available for a Quebec promotion, one for Ontario and one to the remaining provinces.

RECOMMENDATION THREE: ANNUAL PROVINCIAL COMPETITIONS FOR STUDENT DESIGN

There is a widening chasm between the product of fashion design schools and the needs of the apparel industry. It is greatest when assessing patternmaking skills. With the small size of companies, job responsibilities cannot be specialized; as a consequence, much is requested of a designer in a typically undermanaged apparel company.

To bridge the gap, a limited training-in-industry program is recommended for students of fashion design as part of their course requirements. To benefit fully from the exposure, the students should have received at least two years (4 semesters) of training and preferably be attending a public design school. The training-in-industry is proposed to be part of the first term third year. The company selected to have a design department, with a student participating in the development of two lines. The period of in-plant training should range from 10 - 15 weeks. A limited grant should be made available to the manufacturer and student to defray only miscellaneous costs. It is recommended that some restrictions be placed on the number receiving this assistance (per school and per region) to avoid further proliferation of courses.

RECOMMENDATION FOUR: A TRAINING-IN-INDUSTRY PROGRAM FOR STUDENT DESIGNERS

Many designers commented that they would like to attend skill development seminars, particularly on patternmaking, trends in automated machinery and costing techniques. The International Association of Clothing Designers, the Fashion Group, Toronto Club of Clothing Designers and similar associations should be encouraged to present such seminars. Course material could be developed by the Fashion Advisor, Department of Industry, Trade and Commerce. The cost of presenting these seminars could be absorbed, in large degree, through existing federal government programs.

RECOMMENDATION FIVE: SEMINAR PROGRAM FOR FASHION DESIGNERS

B. PROMOTIONAL

Since we have a valued product - Canadian fashion design talent - then of equal value to developing it is promoting it. In Canada this means advertising, and with the nature of this business, attention absorbing techniques that are presented one year, are replaced the next.

There is an important need for a national fashion press service offering photos and stories on Canadian design achievements. Such a program could do much to: offset the almost daily exposure offered Canadians of European fashion trends; complement the efforts of manufacturers attempting to promote their designers through special labels and other advertising; by example, encourage manufacturers to offer more original design. This service should be extended in time to the international press to complement the export efforts of apparel manufacturers.

RECOMMENDATION SIX: A NATIONAL FASHION PRESS SERVICE

B. DEVELOPMENTAL

Many of the mechanisms are in place to upgrade the level of design talent in Canada. There are gaps, which, if overcome, would increase substantially the collective effect of individual efforts.

Computer technology combined with numerical control cutting and sewing devices are the way of the future for the apparel industry. The Federal Government has recognized this, and through proposed Productivity and Development Centres, will be accelerating the adoption of this and other technologies. A key element is computer pattern grading, with expectations most optimistic that facilities offering this service will soon be established in Montreal and Toronto.

The benefit to Canadian fashion designers will be considerable, in that it will free them from the more technical aspects of the design process, permitting them more time for creativity (and originality). With the establishment of such facilities, it is recommended that a mailing be sent to each fashion designer in Canada documenting the advantages of computer pattern grading, the availability and cost of the service, as well as the location of special seminars and inspection tours of the premises. Similar newsletters could be made available on other technological developments and originate from the office of the Fashion Advisor, Department of Industry, Trade and Commerce.

RECOMMENDATION SEVEN: NEWSLETTERS ON TECHNOLOGICAL DEVELOPMENTS

The fashion cycle has been identified as having three constituent elements - design, fabric, colour - changes in which, collectively result in a given fashion. No assistance should be provided the manufacturer/designer in the search for exclusive fabrics or leathers. No incentive is necessary. With respect to colour forecasting, limited assistance is warranted to guide the industry. Colours are to a degree predictable because of the lead time required by yarn manufacturers. Private companies operate such services, primarily in European countries. Canadian designers would welcome this service. It is recommended action be taken to provide a colour information service to apparel manufacturers, the elements including Canadian representation on the International Colour Service, and a limited subsidy (in terms of amount and duration) to attract a company into this area.

RECOMMENDATION EIGHT: A COLOUR INFORMATION SERVICE

The International Association of Clothing Designers certifies and represents men's clothing designers. It represents the pinnacle of what designer associations should be doing. In Canada there are two clubs, one each in Montreal and Toronto, with Toronto awarded the right to host the IACD world convention in 1973. A grant for support to this and similar conventions is recommended, the amount dependent upon industry participation (in numerical and financial terms), expected publicity, and implications to Canadian design development.

RECOMMENDATION NINE: GRANTS FOR DESIGNER CONVENTIONS

Research should be encouraged on fashion in Canada, particularly on consumer motivation in purchasing fashion apparel. This industry suffers too many seasonal and cyclical declines as firms stand idle wondering why their product has lost its attractiveness in the consumer's eye. Examples are the fur industry, the women's coat and suit industry, as well as, to a lesser degree, the foundation garment industry. Note that the basis of fashion demand is largely psychological and is continually shifting in the face of economic and social stimuli. An outstanding Canadian example of the above phenomena, and a recommended approach, is provided in the foundation garment industry;

> "The braless look started to worry WonderBra in 1968, Gilbert says (Al Gilbert, Vice President and Director of Marketing), so they hired a Toronto marketing firm, Martin Goldfarb Consultants, to research women's attitudes to underwear. The results have now become WonderBra philosophy - 'What we read was not bralessness, what we read was that the old styles of bras were no longer suitable' ... 'We interpreted no bra as less bra'." *

The company then proceeded to redesign their line, and when completed, undertook an advertising campaign ($1,000,000 in 1971) to promote the outstanding features of their designs (with apologies for the pun). The article concluded:

> "So why do women wear bras? A large reason is fashion, and bra makers have become heavily fashion conscious in the last ten years."

It is recommended that research be encouraged on fashion in Canada.

RECOMMENDATION TEN: RESEARCH ON FASHION

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* Canadian Magazine; July 22, 1972; page 7.

Members of the Board of Directors of the Fashion Design Assistance Program frequently serve on advisory committees to schools of fashion design, as well as make speeches and grant interviews. They should utilize these available opportunities to recommend a reduction of existing levels of fashion design courses (particularly in Ontario), for some design specialization in areas other than women's wear, for training-in-industry as part of design courses, and for some instruction in the costing of garments, as well as increased attention to patternmaking.

RECOMMENDATION ELEVEN: ADVICE AND GUIDANCE

PROGRAMS NOT RECOMMENDED

(a) Shared cost arrangements to defray in part, the cost of supporting a company in sending their designers to foreign countries for specialized training are not recommended. Companies should be encouraged to utilize Canadian schools to meet their needs. If this is not possible, arrangements should then be made through the Federal Government's Fashion Advisor to develop a special course here, including bringing to Canada the required expertise. The costs could be absorbed to a large degree through programs of the Department of Manpower and Immigration.

(b) Direct grants to retail organizations to promote Canadian designers should not be pursued. The costs will undoubtedly be high, and the publicity limited to a restricted store clientele, with far greater benefit-cost achieved through a national fashion service.

(c) A national competition for fashion designers may appear valuable in attracting attention to Canadian talent, but with the heterogeneity of industry sectors and wide price ranges, the effort appears doomed to chaos. How are we going to get one winner? On what basis? Who is to decide?

(d) A coordinating service has been discussed in some circles. It proposes, on the French model, to have fabric, leather, clothing, footwear and accessory people work together to coordinate styling.

Frankly, I do not feel the industry is ready for it. I am impressed with an apparent alternative, available to date only to Montreal, where one designer works for several firms. This has the dual benefit of not only permitting the smaller firm the benefits of a designer, but also presents the opportunity for a designer to, in effect, coordinate styling through the means of one perspective to several (non-competing) manufacturers.

(e) Whereas it is recognized that a fashion designers' registry would serve the need for an improved mechanism to convey knowledge of (1) jobs to designers entering the market and (2) specialized skills of designers to firms seeking such help, I would recommend such a service only if it could be computerized. To maintain a registry by "manual" methods would be too expensive and time consuming to justify the ends. Furthermore, a designers' registry should not become a defacto employment agency, but rather a source of labour market information to assist in the designer development in this country.

(f) Strong trade mark legislation would benefit manufacturers producing more original design, but it would prove to be administratively complex and too slow in operation to be feasible.

After reading this rather lengthy document, I am sure we both feel like Lady Godiva -- we are glad we reached the clothes.