

# Concentrating on Fashion:

## the Home Market Retail and Distribution Structure for British Dress Textiles, 1919-40

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# Introduction

Changes in dress fabric retail practice in the interwar period:

- Much wider consumer choice
- Mass fashion, for ready-to-wear and drapery
- Short ordering, fast product changes in response to fashion
- Consequent changes in distribution and retail structure: concentration and chains

# Consumer Choice

- Switch from standardised mass-consumption to choice and many product ranges/ varieties

UTR minutes: *'it is not easy to displace CPA goods, that are taken by the dealers because of the large range of patterns available and the good work and colours available in these styles'* 21/1/1925

Mr Spedan Lewis (1935: 69), Chairman of John Lewis Partnership Ltd.:

*'Consider how a generation ago a draper kept very few colours and those harsh, and how he assumed, not mistakenly, that, if he were a not incompetent salesman, he would succeed in persuading almost every customer to accept one or other of them. Now he keeps, in a single fabric, as many as eighty tones of pink, let us say, and the customer goes elsewhere because she has not got the exact colour that she wants, and this, mark me, in fabrics for modest purses.'*

1924 CWS report: lack of Co-operative retail society purchases from the CWS in drapery and fashion due to 'a lack of variety in styles' – reflected in Wilson et al (2013: 192, 195) Leicester Co-operative Society data on purchase source: in 1924, 3.7% of their drapery and 0.5% of their clothing was purchased from the CWS.

Ferguson Bros. Ltd. produced 502 branded fabric varieties in 1931 (159 types of voile), increasing to 762 varieties in 1939 (DB 110/ 63).



Fergonelle, Ferotex, Fersyl, Ferlotta, Ferlissa, Carlette, Carlosyl, Carlissa, Carliche, Carlisa, Derwent, Solent, Cumbria, Scanfell, Skiddow, Artissa, Pamela, Suzette, Carol, Rosemary, Tufleen, Sheenissa, Lingerene, Fairylene . . . (varieties in 1934)

# Fashion for the Mass-Market

- The time lag from couture to the general market collapsed, from a season pre-war (Draper's Record, 1931: 26)
- Emphasis on fashion and novelty of textiles became a much stronger driver across the social scale

Fine & Leopold (1993: 109-110): 'The creation of mass demand was based on a levelling up of expectations . . . , the universal expectation of product turnover and diversity became the norm in the dressmaking sector.'

1935 CWS advertisement, Woman's Outlook (Redmile, 1998:33): *'It is not long since FASHIONABLE Clothing was the prerogative of the few who could afford to pay high prices. But the L.C.S. has changed all that. In the magnificent new BARGAIN BASEMENT recently opened at 40-70, KING STREET, you can buy the season's most fashionable modes at prices which will amaze you.'*

# Kay's catalogue, 1937

*Simple and Ideal*

**V.793 6/11**  
 Ideal Tunic Frack in super soft Figured Spun Art. Silk. Puff Front. Inserted plait in centre Skirt. Pop. Stone. Assorted shades. 100% Silk. Red and Green on White Ground. Length 48" only.

**V.794 8/11**  
 Pretty Floral Spun Art. Silk. Puff Front. 5 Bag. Waist. Puff Skirt. Lengths 48" and 46".

**V.795 9/11**  
 Neat and distinctive number in M. Art. Silk. Vague Neckline. Yoke. Fancy Sleeves. Green only. Length 48" and 50".

**V.796 10/11**  
 Good quality Spun Art. Silk. Place effect with three tiered Neck and Sleeves; contrast piping. Length 47" and 49".

**V.797 9/11**  
 Stylish Frack in Check Printed Art. Silk. decorative pockets with buttoned Flaps. Leatherlike. Lengths 47" and 49".

**KAY & Co. Ltd**  
 St. Oswald's Worces  
 Catalogue 465  
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*Practical Overalls in Smart Washing Fabrics*

**W.713**  
 (O.S. & Ex. O.S.)

**W.714**  
 Fine Print Overall in various shades on light grounds. Fancy cross-over style.

**W.716**  
 Smart slip-on style, featuring a new decorative front. Horrocks' excellent Print. Assorted shades.

**W.710**  
 Horrocks' Print Piratette. Assorted designs.

**W.720**  
 Popular two-tie style in extra strong Print. on light grounds in assorted shades. Unexcelled for wear.

**W.712**  
 Always in demand, fancy coloured Cost Overall in Cretonne pattern prints.

**"KAYS OF WORCESTER"**  
 ESTABLISHED 1840 YEARS  
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# From Durability to Fashion

Mr E.H. Symonds (1931), managing director of Reville Ltd., commented:

*'Any retailer who in these times advertised that his dress materials were so good that they would last for years would be taking the quickest and surest road to the bankruptcy court. All that most women now required was a reasonably good standard of quality that would not outlast the lifetime of modern fashion.'*

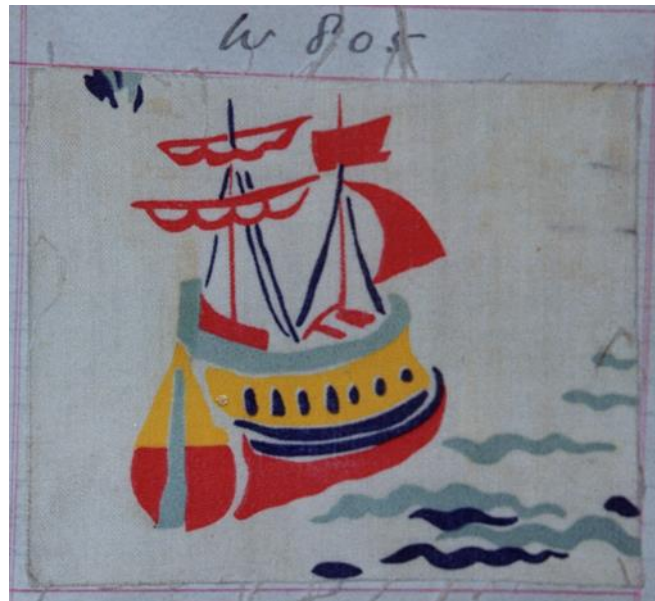
The FCP commented on this change in 1930:

*'It has changed enormously. It came about in the war. It seemed to loosen people's outlook upon these things and they are more apt to buy any new thing that comes along and then drop it. . . The service given is very largely different. The styles have altered. They are much more elaborate styles. The public have to be tempted and coaxed, they want richer food so to speak.'*

Calico Printers' Association  
Engraving Book Prints (M75)



Design S9685, 18/6/34.



Design W805, 24/11/36.

**Novelty  
and  
Variety**



Design D5887, 27/8/38.



Design S16863, 24/2/37.



# Ferguson Bros. Ltd. Trade Advertisements: Novelty and Extensive Range

THE DRAPERS' ORGANISER

## Ferguson Fabrics

**ARTIFICIAL SILK & COTTON FABRICS**  
**SUZETTE**  
A fabric for the fastidious, but moderate in price. In most extensive ranges of delightful designs that cannot fail to attract.

**JULIETTE**  
An alluring fabric so rich and soft that many would mistake it for crepe-de-chine. It is printed in original modern designs and clean fresh colours.

**LOUISETTE FOR LINGERIE**  
LOUISETTE is sheer and fine as a lingerie fabric must be. It is light, soft, and delicate. It is the lingerie fabric that the dainty woman loves.



**PRINTED VOILES**  
These charming voiles are ideal fabrics for dainty frocks and lingerie.


39/40 in. **PRINTED VOILES**  
Ferguson voiles have achieved world-wide supremacy by virtue of their designs, colourings, and quality. Over 200 ranges of different designs.

50-in. **VOILE**  
This wide voile fabric carries designs which cannot be featured on a narrower width.

## FERGUSON FABRICS

Holme Head Works, Carlisle. London: 39 Aldermanbury, E.C.2. Manchester: 62 Spring Gardens.

Drapers' Record advertisement, 1928



## FERGUSON FABRICS

NOVELTY DRESS FABRICS IN ARTIFICIAL SILKS & COTTONS  
PLAIN DYES & PRINTS  
ALSO HIGH CLASS TAILORS' LININGS

**STAND Nos. 57, 58, 59 & 60, HALL 'C'**

FERGUSON BROTHERS LIMITED, HOLME HEAD WORKS, CARLISLE  
London: St. Alphage House, 45 Aldermanbury, E.C.2. Manchester: York House, 12 York St.

British Industries Fair catalogue back cover, 1935

# Distribution Changes: Short Ordering Practices

- A wide range of lines, with small 'hand-to-mouth' orders and stocks of each line held by wholesalers and retailers

Drapery ordering at the C.W.S. (Redfern, 1938: 335):

*'Where it was usual for the wholesale drapery purchases of 1913 to be made in due season, with sober replacements following, there are buyers in 1938 who will order a little at a time, and look in at the warehouse to say "I saw that last week. I want something new!"'*

- Schoeser & Rufey (1989: 170): change in ordering practices of retailers in 1921 to minimal orders, to facilitate turnover and minimise risk.
- The United Turkey Red Co. Ltd minutes show a pattern of small orders from September 1921, especially evident in periods of economic difficulty (1921-3, 1926, 1930-2) e.g. *'Home Trade very dull. Glasgow buyers not allowed to buy for stock'* October 1922 and *'Wholesale Houses not selling much and only buying hand to mouth'* August 1926.
- The Drapers Record noted (July 1931) a general trade tendency for retail buyers to purchase only small quantities of any line.

# Manufacturers' views

- This development was described to the Economic Advisory Council Committee on the Cotton Industry in February 1930:

*'The sort of fabrics we are printing are enormously more expensive than we used to print before the war, artificial silks and things like that, and all that means **much shorter running** because people will not take the risk of putting down such big stocks because they may get landed with too much, and the fashions are changing so rapidly, **the fashions are in and out enormously.**'*

**Production techniques** (engraved copper roller, surface wooden roller, block prints) **remained the same for most printed textiles**, though screen prints were introduced for a small segment of the higher priced trade. **Therefore short runs** (with the lost time and costs of new rollers) were **much more expensive**, and doing many different designs was a speculative risk, rather than offering only basic colours and patterns. New fabrics, often artificial silks and mixed fabrics, as well as novelty finishes were developed.

- The commercial alarm felt is shown by Geoffrey Turnbull, a director of Turnbull & Stockdale Ltd. (1951: 336):

*'If the demand for novelty is carried to extremes, **damage to the trade as a whole results.**'*

# Changes in Distribution Structure

- Establishment of manufacturers' brands

LADIES SHOULD LOOK FOR THE COURTAULD HOUSE MARK WHEN BUYING DRESS AND LINGERIE FABRICS

IT IS A GUARANTEE OF QUALITY AND SATISFACTORY SERVICE

Gay Times with "San-Toy"



IN DRESSES of "SAN-TOY" Printed Fabrics, gaiety finds a splendid outlet. Wherever you wish to be gay, the range of "SAN-TOY" Printed Fabrics offers you textures and colourings in richest variety—and all of them dependable. See the newest patterns now—at your Drapers or Stores.

**San-Toy**  
(Registered) Printed Fabrics  
WOVEN BY COURTAULDS.

Yoan, dear—Madam's newest craze is "Courgette." You'll love it!



Confidences of a mannequin.

NO wonder the lovely "Courgette" wins favour everywhere, when modistes use it for their finest creations! This delightful dull crepe fabric in the most captivating colours, repays extensive use for frocks, dresses and wraps, etc., by behaving splendidly. For "Courgette" is a true Courtauld Fabric. 36/37 ins. wide. 4/11½ per yard.

**"Courgette"**  
(REGISTERED)  
A COURTAULD FABRIC.

"SAN-TOY" Printed Fabrics and "COURGETTE" are sold by leading Drapers and Stores.  
If any difficulty in obtaining suits direct to the Manufacturer

BRITISH TEXTILES EXHIBITION

Two of the most interesting Stands in the White City



**Judy**  
FROCKS & FABRICS  
STANDS 195-197



**"LIZARD"**  
FURNISHING FABRICS  
STANDS 194-196

You are cordially invited to inspect the full 1935 Ranges

**WM. O'HANLON & CO. LTD**  
MANCHESTER • LONDON • GLASGOW  
Phones: LIZARD: SHEPHERD'S BUSH 5254. JUDY: SHEPHERD'S BUSH 5152

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British Industries Fair catalogue advertisement, 1935

Coming Fashions, January 1931

# Changes in Distribution Structure

- Direct trading (scandalously!) of the big retailers with manufacturers, such as department stores, the CWS and M & S.
- Mr Charles Jarvis, managing director of the wholesalers Stapley & Smith Ltd., reported 'the loss of many valuable accounts through the policy adopted by large retail traders, who were going direct to the manufacturer and cutting out the wholesaler' in *The Drapers' Record* in February 1931.
- Retailers commissioned 'job' printing by as well as engaged designs. The Wholesale Textile Association was highly influential in attempting to prevent direct trading between retailers and manufacturers, as was the feeling by manufacturers that such a relationship was almost unethical (Rees, 1969: 104-5). Manufacturers also increased their direct trading with printers and selling of branded goods.

# Partial Vertical Integration: Engaged Designs

Marks & Spencer Ltd.: 1938-9  
Ferguson Bros. Ltd.



Design T395 11/9/38.



Design 4369, 10/7/39.

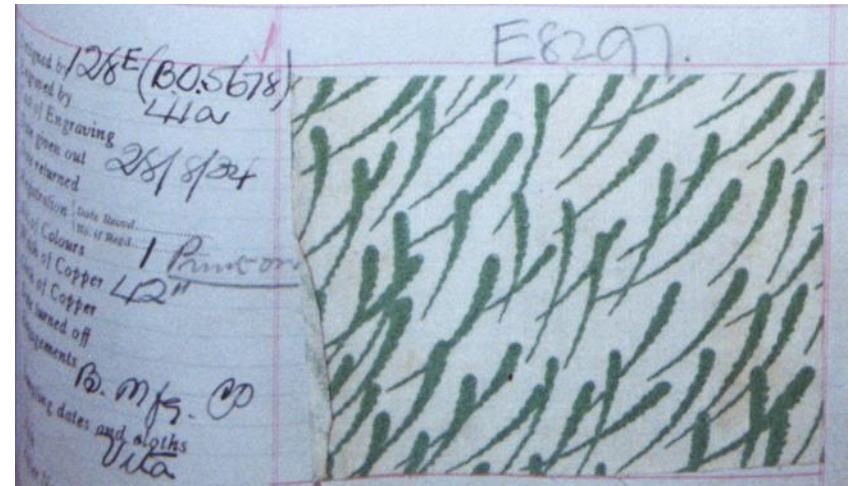


Design T422 31/7/39.



Design 4308, 30/8/39.

B. Mfg. Co.: 1934, Calico Printers'  
Association Engraving Book Prints (M75)



# Changes in Retail Structure

- Expansion of **co-operatives**, with department stores from the 1920s (Redfern, 1938; Morrison, 2003 :276)
- Increase in chain stores: there were over 40,000 branches of multiple shops by the late 1930s (Jefferys, 1954). In 1939, there were 234 **Marks & Spencer Ltd.** stores in the UK, in each moderate-sized town: its 5s maximum price for garments kept its clothing targeted to the working class (Worth, 2007; Shaw et al, 1999; Rees, 1973). **British Home Stores** (from 1928), a variety store that also set a 5s limit, sold drapery and some clothing; **Woolworths** sold children's clothing.
- Reduction of independent, 'Madame' stores, from 82% of retail in 1915 to 65% in 1939 (Pollard, 1983: 111)
- Concentration of department stores due to amalgamations by the Drapery Trust group, United Drapery Stores Group, **Debenhams, Selfridges, John Lewis Partnership, Barkers**, etc.: overall there were c525 department stores in the 1930s (Corina, 1978; Lancaster, 1995; Jefferys, 1954)

Newcastle Co-operative Society Ltd.  
department store, 1932



# Trends in Retail

- Switch **from drapery sales** to **ready to wear**
- Increasing use of fixed retail prices in chains such as M & S and Woolworths. M & S: self-service, cash sales only and fixed prices (Worth, 2007). Bainbridges and later department stores also sold marked price drapery for cash sales only, with high turnover and low profits (Lancaster, 1995).
- Concentration of drapery sales in department stores



Selfridge's shop window fashion display, 1920



Marks & Spencer's Ltd. Sheffield shop interior, c1932



# Conclusion

A new model of consumption in the period?

A **mass-fashion system** of many product lines (**novelty and variety**), with associated unpredictability of demand, rather than volume production and stocks held of basic lines.

Adaptations in retail and distribution structure and practices: move to ready-to-wear; direct trading of retailers with manufacturers; concentration in retailers, with a switch to chain and department stores.

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