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THE DEVELOPMENT OF THE RETAIL FABRIC  
BUSINESS IN MONTANA

BY

MARY DOHERTY ROUANE

B. A. MONTANA STATE UNIVERSITY, 1956

presented in partial fulfillment of the requirements for the  
degree of

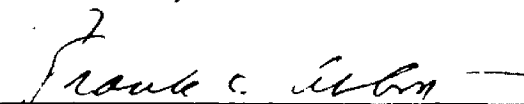
Master of Arts

MONTANA STATE UNIVERSITY

1964

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Chairman, Board of Examiners

  
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## Chapter I

### Introduction and Methodology

1. Introduction. The textile and clothing industry in the United States grew from primarily a home industry in 1800 to one of the five largest industries in the country.<sup>1</sup> The Industrial Revolution made possible the manufacture of fabrics and clothing in factories instead of in the home. With this movement away from the home, it was necessary to sell these products of the factory to the household through a retail outlet, namely, the retail store. Stores of this type developed in central locations to provide goods to the families of the area. They provided a means of exchange for families to sell their excess goods for things they could not produce. The imported goods from England and cloth that women of the area still continued to weave were sold in the old country stores.<sup>2</sup> The general stores provided a natural outlet for the goods produced in the new factories of the New England states. Today these stores, the general merchandise, the department store, variety store and dry goods store, provide the major outlet for fabrics sold to women who sew their own clothes.

The retail marketing of fabrics is an important link in Home Economics and therefore, important to the profession. The study of textiles and clothing construction are two sub-

1. Mildred Thurow Tate and Oris Glisson, Family Clothing (New York, 1961), pp. 61.

2. Gerald Carson, The Old Country Store (New York, 1954), pp. 19-22.

jects in the field of Home Economics that deal directly with fabrics. In clothing construction the basic raw material is fabric purchased from a retail store in the measured form of yardage. This fabric is sold in retail stores by the yard from a bolt of cloth which consists of approximately thirty yards in length. The inventory display of bolts of cloth in a retail store provides a variety of fibers, fabrications and finishes for selection by consumers. The retailer fabric merchandising practices vary from one dealer to another, providing various materials for investigation by textile and clothing students of Home Economics.

2. Significance. Since World War II there has been a renewed interest in home sewing in the United States. In the past ten years new fabric shops have opened up and the chain stores have improved their fabric sales and increased their emphasis on the fabric department. The population explosion in the last twenty years has increased the number of potential home sewers and the average age of the home sewer today is approximately twenty-five years younger than those of twenty-five years ago. This age group is fashion conscious because it reads the fashion magazines. It has the added leisure hours a short work week provides and home sewing makes profitable use of leisure time. Of the teenage group, it is estimated that 6,000,000 are being taught home sewing in schools, 4-H clubs and store sponsored classes and they are responsible for 60,000,000 yards of

fabric sales each year.<sup>3</sup>

The improvements in diagrams and better instructions on use of paper patterns has made home sewing much simpler and easier. The result is that approximately 100,000,000 paper patterns are sold each year. New low retail prices of sewing machines have boosted sales to 1,000,000 annually with 30,000,000 machines in use now in homes in the United States. About one billion yards of all types of fabrics are sold annually and because of it about \$350,000,000 worth of sewing accessories are sold annually, also.<sup>4</sup>

Sales in the high fashion patterns, such as Vogue Paris Originals and Spadea Famous Designer patterns, have increased to a million dollar business. Toni Howard in a recent article states, "considering that about 20 percent of all feminine clothes in America are made at home; to call this a revolution is something of an understatement."<sup>5</sup> A Sheridan Sand's editorial says, "Research tells us that 28,000,000 American women are sewing some of their own clothes... and spending nearly \$2,000,000,000 annually on this avocation."<sup>6</sup> An investigation of the retail fabric business at this time will lead to a better crystalization of thought on the subject.

3. Purposes. The purposes of this study are to develop and examine the scope and nature of the retail fabric

3. National Retail Merchants Association, Bigger Business in Piece Goods with more Profit (New York, 1963), p.2.

4. Ibid. p. 1

5. Toni Howard, High Fashion for Housewives. Saturday Evening Post, 35 (May 19, 1962), p. 95.

6. Sheridan Sands, Editorial, Fabric and Trimming News, New York (January, 1963).

business in Montana and some major conditions that affect it. County seats, considered the most representative retailing areas of the county, were the major objectives for investigation, and many towns which were easily accessible on the highway between county seats were also included in the survey. An estimated volume of sales in fabrics and inventory value for 1962 as well as information relating to methods of retailing fabrics and the problems entailed, were sought for a clearer understanding of the retail fabric business.

4. Definitions of terms. The retail fabric business is the selling of cloth which has been woven, knitted or otherwise fabricated, on a retail level from stores.

Bolt goods are cloth doubled and rolled on bolts, which consist of pieces of heavy paper board around which approximately thirty yards of finished cloth are wound. Fabrics, which should not be doubled, but are placed flat on round rolls of heavy paper board, will also be considered as bolt goods. This is the generally practiced method of stocking and displaying fabrics in retail stores. The customer can order any yard length cut from the bolt.

Short lengths are pieces of fabric from one to ten yards not doubled and rolled or rolled flat, but rather flat folded and referred to as "mill ends" by the piece goods business.

Packaged goods are defined as dress length goods of four yards which are folded and placed in a plastic bag or with a paper band around the folded fabric.

Skirt lengths are fabrics of one or two yard lengths cut for the purpose of making a skirt.

Retail stores are defined as general merchandise stores, department stores, limited variety stores and specialty stores.

General merchandise stores are establishments primarily selling food, but which also stock dry goods and household linens and either apparel and accessories or furniture and home furnishings, and sometimes all of these.

Department stores are establishments engaged in selling some items in each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radios and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods
4. Hardware, china, etc.

Limited variety stores are interested primarily in selling a variety of merchandise in the low and popular price range; as stationary, gift items, women's accessories, toilet articles, light hardware, toys, house wares, confectionery. These establishments are known as Five and Ten Cent Stores and Five cents to Dollar stores.

Specialty stores deal only in piece goods, notions, sewing supplies, with some knitting supplies and dry goods, or any combination of these commodities.

5. Problem. In accumulating available information on the development of the retail fabric business in Montana,

this study will explain:

- I. How and why changes in marketing of fabrics have occurred.
- II. What types, quality and volume of fabrics are sold in Montana.
- III. What types of stores have developed in urban areas.
- IV. What types of stores exist in rural areas.

Thus, the problem is "How" and "Why" has the retail fabric business in Montana changed during the period from 1920 to 1960.

6. Procedure. Historical background material is necessary for an understanding of the retail fabric business. Such information was sought from history books, journals, Montana newspapers and personal interviews with people who were acquainted with fabrics and business. Information from the U.S. Census of Retail Trade, R. G. Dun and Co. reports, and various estimates of income and population were used. Retail stores in Montana were consulted for specific information on volume of sales, rate of inventory turnover, inventory stock, types of fabrics sold and price range for a sample of fabrics.

A preliminary investigation was made in Missoula County to determine what information the retailers would contribute to a study of this nature. On the whole, retailers were willing to cooperate with information on price, the rate of inventory turnover, inventory stock and total sales for 1962.

Where the manager did not wish to commit himself, he was willing to give help in assisting this researcher in making an estimate of inventory stock which was then multiplied by turnover rate to give an estimate of total sales.

A Great Falls trip was taken to secure information from stores there while attending the State Home Economics convention. Delegates to the convention assisted by giving names of stores and store managers in towns from which they came. Names of other stores were secured from telephone books.

The success of the preliminary investigations assured moderate success for the planned state-wide survey which was then made as follows: 1. route south from Missoula to Darby; 2. northwest from Missoula to Saltese; 3. Missoula east to Helena, Townsend, Three Forks, Bozeman, Livingston, Big Timber, Red Lodge and Billings, north to Roundup, Harlowtown, and White Sulphur Springs; 4. east and south from Missoula to Deer Lodge, Butte, Dillon, Anaconda; 5. north to Thompson Falls, Noxon, Libby, Eureka, Whitefish, Columbia Falls, south to Kalispell, Polson, Ronan; 6. east and north from Missoula to Choteau, Browning, east to Cut Bank, Wolfpcint, Scobey, Plentywood, south to Culbertson, Sidney, Glendive, Wibaux, Baker, Ekalaka, Miles City, west to Forsyth, Hysham, Billings, and northwest to Winnett, Lewistown, Stanford, Belt and Fort Benton, with all towns between on routes.

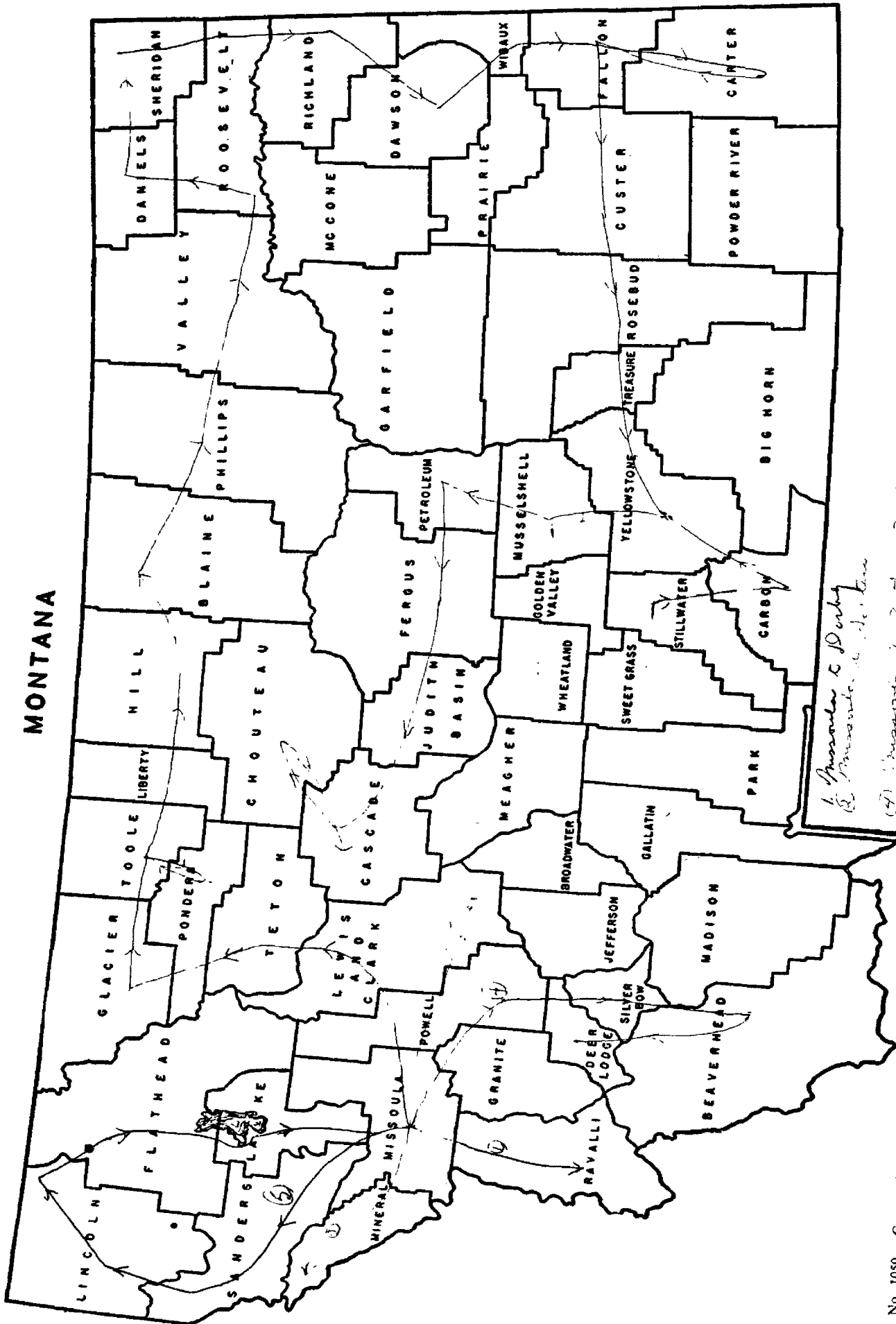
Due to lack of funds a side route from Billings to Hardin,

Broadus, north to Terry, Circle and Jordan had to be omitted, as was also the trip to Virginia City, Boulder and Phillipsburg. These places were then investigated by questionnaire and thanks are due to the newspaper editors in those places who so kindly sent names of stores and managers upon request. The questionnaire, developed from the check list used for personal interviews, Ex. 1, is found in Ex. 2.

Information on the development of Montana business enterprises with special emphasis on the retail fabric business from the time of the explorers and fur traders to the war years of the 1940's is found in Chapter II. A summary explanation of the development of fabric manufacturing in the United States and conditions affecting this business as well as analysis of fabric manufacturing in Montana is presented in Chapter III. The results of the survey of Montana, in Chapter IV, are presented in tabular form and analyzed. A summary of the study and conclusions are presented in Chapter V.



# MONTANA



1. Mountain to Park  
 2. Mountain to Park

- (A) Mountain to Park, Yellow River
- (B) Mountain to Park, Yellow River
- (C) Mountain to Park, Yellow River
- (D) Mountain to Park, Yellow River
- (E) Mountain to Park, Yellow River
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- (U) Mountain to Park, Yellow River
- (V) Mountain to Park, Yellow River
- (W) Mountain to Park, Yellow River
- (X) Mountain to Park, Yellow River
- (Y) Mountain to Park, Yellow River
- (Z) Mountain to Park, Yellow River

No. 1050 — County Outline Map  
 STATE PUBLISHING COMPANY  
 Helena  
 AZ Pads — R-YY

Ex. I.

Ex. 2

CHECK LIST

Type of store: Dept. Gen Merc. Chain Limit P. Special variety

Location of storeLocation of DepartmentTypes of Fabrics:

Cotton Rayon Acetate Linen Silk Other syn 100% wool

Wool blends

## Year store started selling fabrics:

1900 1900-1930 1930-1940 1940-1950 1950-1960 After 1960

Stock inventory

Rate of turnover

Season

2 times

4 times

Total sales

Floor space:

Separate room

well-defined area

confused area

Display:

On boltsshort lengths

window display area

## Ex. 3. HOME ECONOMICS DEPARTMENT

## QUESTIONNAIRE ON RETAIL FABRIC BUSINESS IN MONTANA

1. Please check which classifications apply to your store:  
Department store---, Gen. Merchandise---, Chain---,  
Limited price variety---, Specialty fabric---, Independent  
---.
2. Please check location of your store in your town: On main  
business street---, Off main business street---, shopping  
center---.
3. Please check location of piece goods department in your  
store: Main floor: front center--, front side---, back  
center--, back side---, mid center---, separate room---.  
Basement---, Upstairs---, Total store---.
4. What types of fabrics do you carry by fiber content:  
Cotton---, Rayon---, Acetate---, Flax linen---, Silk---,  
Other synthetics---, 100% wool---, Wool Blends---.
5. What year did your store start selling fabrics: Before  
1900---, 1900-30----, 1930-40----, 1940-50----, 1950-60  
----, After 1960----.
6. Do you buy for a 2---, 3---, or 4--- season year in piece  
goods?
7. Do you buy piece goods from salesmen---, wholesale out-  
let---, company warehouse---, or do you go to market?  
If from wholesale outlet or market, will you please name  
the city you go to?
8. Approximately how much floor space do you allocate to  
piece goods?
9. How many times a year do you have a window display on  
piece goods?
10. Do you use the 2-10 short length mill ends---? If so,  
do you use them as promotion---, or as regular stock---?
11. Do you use short skirt lengths---? If so, as promotion---,  
or as regular stock---?
12. Do you carry bolt goods---? 50% or less of stock---?  
Major portion---?
13. Would you please give an estimate of an average inventory  
stock in piece goods only?-----
14. What is your rate of turnover in piece goods?

15. Will you please give an estimate of total sales in piece goods for last year?-----.
16. Is there a home economics department in your school?
17. Are there 4-H groups in your county?
18. Do you receive good cooperation from home economics people in your area?
19. Are there any suggestions for improving home economics relations with you and your store?
20. What buyer group is the biggest purchaser of piece goods in your store: Teen-age---, Young married women with children---, Middle-aged women with teen-age children---, Older women---?
21. Are purchasers of piece goods basically interested in: price---, fashion---, service---, quality---?

## Chapter II

### Historical Background of Retail Trade in Montana

1. Explorers and traders. The first white men to arrive in Montana came as explorers and fur traders and were not interested in establishing permanent settlements. They came for adventure and trade with the Indians, starting with Menard in 1794 who reached the upper part of the Missouri River. The famous Lewis and Clark expedition came through Montana in 1804 to explore a route to the Pacific and en-route traded with the Indians. "The Shoshones were not hard to deal with because they longed for American goods."<sup>1</sup> Other Indian tribes received goods from the English. Larocque's Journal indicates that he purchased beaver skins in 1805 from Indians around Pryor Creek, and the Flathead and Kootenai tribes were trading with David Thompson who established a warehouse at Libby, Montana in 1808 and another, the Salish House, near Thompson Falls.<sup>2</sup>

2. Settlements in Western Montana. The first permanent settlement was that of St. Mary's Mission, founded in 1841 by Father DeSmet. Operating until 1850, the mission buildings were sold to Major John Owen, who established a trading post there. Owen's ledger records the first sale of fabrics in Montana. While the stock at the fort was limited to necessities, few clothes were sold. "Most of the men had squaws who were excellent seamstresses, and the trade room did a

1. Merrill Gildea Burlingame and K. Ross Toole. A History of Montana. (New York, 1957), p. 67.

2. Ibid

brisk business in its handsome assortment of cloth."<sup>3</sup>

(A listing of this cloth and varying prices by years are reproduced in Table I.) During this same period of time, the Mission of St. Ignatius was established in the Flathead area reservation in 1854. This mission thrived and in 1857 sheep were brought into the area. It was not until 1864, however, that a school, provided for in the 1855 treaty, was established, when the first four Sisters of Providence arrived from Montreal, Canada, by way of Cape Horn and overland from Walla Walla.\* "Soon the Indian girls were being taught sewing, cooking, laundry and garden work as well as reading, writing, spelling, arithmetic and music."<sup>4</sup>

Frank Lyman Worden, who had a firm in Walla Walla, formed a partnership with Christopher P. Higgins when construction of the Mullen Road from Walla Walla to Fort Benton opened the way to immigration trade. In 1860 they started east from Walla Walla with 75 horses laden with merchandise to open a store at Hell Gate. This was the first real commercial establishment in this area.<sup>5</sup>

3. Settlement in Eastern Montana. In eastern Montana territory the American Fur Company cultivated friendly relations with the Blackfoot Indians, consisting of four major

3. George F. Weisel, Man and Trade on the Northwest Frontier as shown by the Fort Owen Ledger, (Missoula, 1955), p. 238.

\* An interview with a Sister of Providence who had read records of the order.

4. Burlingame and Toole. p. 317.

5. Walter H. McLeod. The Founding of Business Enterprises in Missoula County in the Early Days of the Montana Territory. M.I.A. paper. 1963, p. 3.

Table I

Types of Cloth, Prices per Yard at Fort Owen, 1850-1855.

	1850	1851	1852	1853	1854	1855
Apron check						
Blue Twill cotton						
Blue						
Broad cotton						.05
Calico		.75				
Cotton		.75				.12
Cotton plaid			3.50			
Cotton check						
Domestic						
Drilling	.50					
Flannel						
Red Flannel						
Gingham						
Green		6.00				5.00
Hickory						
Linsey						1.50
Linsey, heavy plaid						
Louisiana plaid						
Muslin, heavy stripe						
Satinet						
Scarlet						4.50
Scotch						
Streulle, green						1.50
Ticking						
Union Stripe						
Cotton stripe						

Types of Cloth, Prices per Yard at Fort Owen, 1856-1860.  
(Continued on next page)

## Types of Cloth, Prices per Yard at Fort Owen, 1856-1860.

	1856	1857	1858	1859	1860
Apron check	.25				
Blue twill cotton		.37			
Blue			5.00		
Broad cotton	.25	.50			
Calico	.25		.30		
Cotton					
Cotton Plaid					
Cotton check		.25			
Domestic		.20			
Drilling					
Flannel		.75			
Red Flannel	.62	2.00	1.00		
Gingham			1.00		
Green		3.00			
Hickory			.75		
Linsey		2.00			
Linsey, heavy plaid	.75				
Louisiana plaid			.25		
Muslin, heavy stripe		.25			
Satinet					3.50
Scarlet		6.00			
Scotch		6.00			
Streulle, green					
Ticking		.25			
Union Stripe		1.00			
Cotton stripe	1.00				

Sources: George F. Weisel, Man and Trade on the Northwest Frontier as shown by the Fort Owen Ledger. p. 238.



groups whose total population has been estimated at 25,000.<sup>6</sup> This tribe had been trading with the Hudson Bay Company of Edmonton. The first post established by the American Fur Company was at Fort Union. From there a series of forts were constructed and maintained for short periods along the upper part of the Missouri River in the vicinity of the mouth of the Marias River. McKenzie was the man whose energy and daring made it possible for his company to gain a foothold in the Blackfoot territory. This series of posts was the forerunner of a more permanent establishment, namely, Fort Benton, built in 1846 by Major Alexander Culbertson. The Indians brought their furs to Fort Benton and purchased supplies from the store at the fort. "The articles purchased by the Indians were blankets, cloth, beads, knives, flint and steels, bracelets, and rings, etc."<sup>7</sup> To cope with the great increase in trade the American Fur Company bought steamboats to use on the Missouri River. The Chippewa was the first steamboat to arrive at Fort Benton in 1860. This venture started the race up the river with freight and passengers to Montana Territory. "In 1864 Mathew Carrol and George Steele erected a store building and began the first business outside the fort. Other buildings followed and in 1865 a town site was laid out by Col. W. W. DeLacy."<sup>8</sup> The I. G. Baker Mercantile Business, founded in 1866, provided a seamstress in the back of the store to make up the piece

6. W. S. Bell. Old Fort Benton, what it was and how it came to be. (Helena, 1909), p. 15.

7. Ibid. p. 23.

8. Ibid. p. 28.

goods that women of the area purchased. This seamstress generally hired three girls to help her with the sewing and they in turn learned the trade.<sup>9</sup> The fabrics of the day were calico as basic, with wool in winter, silk moire and satins for street and better dresses, and black and white dotted mull\* for summer.<sup>10</sup> The Power Company was established the next year, 1867, and still exists as the Pioneer Mercantile.

By 1867 traffic on the Missouri River had increased to 39 steamboats arriving at Fort Benton, with a total of 8061 tons of freight and 10,000 passengers. Most of the freight and passengers were headed for the gold fields.<sup>11</sup>

4. Settlements by gold seekers. Gold had been discovered at Gold Creek in western Montana in 1862 and while this discovery was not too valuable, a branch store of Worden and Higgins from Hell Gate was opened.<sup>12</sup> The first large gold discovery was at Grasshopper Creek in July, 1862. By late 1862 Bannock was established with a population of 400 people. Many of these people were returning from the gold fields in California and Idaho. "By spring there were probably 1,000 residents and the tents and wickiups were giving way to cabins and even false fronts."<sup>13</sup> A larger

9. Mrs. Norma Hammer. Resident of Fort Benton. Information received in an interview with her.

\* Mull - a thin soft muslin.

10. Mrs. McLeish. Resident of Fort Benton. Information received in an interview with her.

11. Joel F. Overholser. Souvenir History of Fort Benton. Fort Benton, Montana. p. 14.

12. McLeod. p. 4.

13. Burlingame and Toole. p. 124.

gold strike occurred at Alder Gulch which caused an influx of people to found Virginia City. "Virginia City, Nevada City, Circle City and Central City, all in the same gulch, housed some 6,000 people by late 1863."<sup>14</sup> In November 1863 J. H. Morley, a miner, wrote in his diary, "It surprises me to see how rapidly this country improves. First, two miles below here is Virginia City, thriving village with many business houses;... but these were not all miners; they were storekeepers, farmers, teachers, bankers, freighters and artisans."<sup>15</sup> The firm of Dance-Stewart and Company had a mercantile store in Virginia City as well as Cottonwood City (Deer Lodge).<sup>16</sup> Because of the money available and high prices..." hundreds of farmers and irrigators came to the mountain valleys to provide food for the miners."<sup>17</sup>

In 1864 the gold rush to Last Chance Gulch resulted in the founding of Helena. By 1867 stone buildings were being erected. A United States Land Office was opened and a bank and a courthouse were built. Because of its location Helena became the center of a large freight business. The first freight firms were established there to transport freight from Fort Benton to Helena and Virginia City. The first stage line was between Helena and Virginia City, then extended to Fort Benton.

When placer mining began to decline at Helena and Vir-

14. Ibid. p. 125

15. Ibid. p. 127

16. McLeod. p. 4.

17. Burlingame and Toole. p. 281.

ginia City, Fort Benton became a merchant center. Wholesalers and jobbers opened trade with new markets of Judith Basin, the quartz mines at Maiden and Baker, Lewistown and the Sun River area. Fort Benton provided trade for the Blackfoot and Assinaboine agencies and also supplied the Canadian Northwest Mounted Police at Fort McLeod and as far north as the Great Slave Lake on the Whoop-up Trail. "In its boom years, between 1874 and 1883 this artery of northwest commerce carried one third of all freight handled through Benton and enriched Montana merchants with profits drained from Canada."<sup>18</sup>

5. Cattle and sheep industries. A decrease in the number of buffalo opened new grass ranges to the cattle and sheep industries. Large drives of cattle came up from Texas for summer range. While sheep had already been introduced in the state by the Jesuits in 1857, the first large drive was made by Conrad Kohrs who brought in 400 head from Utah in the winter of 1863-64. The missionaries of St. Peter Mission brought in another band of 300 from Oregon in 1867. The first sheep ranch was set up by John F. Bishop and Richard Reynolds who trailed 1500 head from the Dalles to the Beaverhead near Dillon. The clip from this flock, purchased by C. H. Broadwater for 1.9 cents per pound and freighted to Corinne was probably the first Montana wool marketed.<sup>19</sup> (Table II shows the increase of sheep in

18. Overholser. p. 12.

19. Burlingame and Toole. p. 217.

Montana from 1870 to 1910.) Billings became a sheep and wheat center, Butte grew as the copper hill and Miles City prospered as a horse and cattle center. With the growth of these towns and businesses the retail outlets grew in number.

6. Business establishments. By 1875 R. G. Dun and Company listed 292 merchants in Montana, divided among fifty towns. In ten years this list increased to 1954 and in 1895 to 4859. Then the rate at which new businesses were established declined some and in 1918 "Dun recorded 11,871 mercantile establishments in the state."<sup>20</sup> With war and drought the number was reduced. This is illustrated in Table III on the failure of mercantile businesses for the period 1911-27 when the number of failures increased and the assets of the businesses varied substantially between years. (Table IV is a list of stores started before 1900 still in existence in 1963.)

The first official Census of Business in 1929 recorded a volume of retail mercantile sales at \$238,293,000. Of these total sales, the amount of fabrics sold averaged around 1.5% of total sales in stores selling fabrics.<sup>21</sup>

During this period the mail order houses became very significant in Montana because of the rural nature of the population and the long distances to travel for a good selection of merchandise in the larger cities of Montana.

20. Ibid. p. 373

21. Ibid. p. 133  
(Census of Business)

Table II

Increase in sheep production in Montana, 1870-1910.

Year	Head of sheep	
1870	2,600	
1875	60,000	
1880	385,000	
1885	1,408,000	
1886	1,500,000	
1901	6,000,000	6 times the number of cattle
1910	5,000,000	Decrease caused by change in industry from wethers to a lamb and ewe basis because of lowered wool price and increased consumption of mutton
1915-----		Most great bands had disappeared because of loss of open range.

Table III

Table of failures of business in Merchant group in Montana

Year	No. of Merchants	No. of failures	Assets	Liabilities
1910	6,476	129	\$ 632,414	\$ 744,294
1911	6,796	115	747,801	897,031
1912	7,274	32	159,120	249,706
1913	8,272	53	137,052	283,015
1914	9,359	91	687,142	886,756
1915	10,363	64	1,240,174	1,366,666
1916	10,971	80	561,386	603,700
1917	11,303	90	448,791	522,638
1918	11,871	95	868,714	880,397
1919	10,899	65	316,928	424,558

Montana 1920. p. 117

Chas. D. Greenfield

Dept. of Agriculture &amp; Publicity

Data by R. G. Dun &amp; Co.

Montana Failures, Mercantile

1922	10,621	224	2,091,566	3,357,117
1923	10,696	216	1,873,927	2,828,393
1924	9,749	166	1,256,483	2,015,033
1925	9,694	164	963,095	1,580,834
1926	9,435	166	1,093,833	1,234,019
1927	9,688	122	704,230	926,020

Montana 1925, 1927, 1929

Chas. D. Greenfield

Dept. of Agri. &amp; Publicity

Data by R. G. Dun &amp; Co.

Montana Failures, Mercantile

Table IV

Present existing stores started before 1900.

<u>Year</u>	<u>Name and Location</u>
1865	Missoula Mercantile Company
1867	Power Company, now Pioneer Mercantile, Fort Benton
1880	Elios, Dillon
1881	A. W. Miles, Livingston
1883	Flieghman's, now McDonald chain, Helena
1883	McGowan's General Merchandise, Plains
1886	Hennessy's, Butte
1886	Trafton and Dorr, Malta
1892	Chambers and Fisher, Bozeman
1899	Davall's Mercantile, Columbia Falls
1899	Swartz, Anaconda

In the home owned stores of the state, credit was usually extended to the customer. In some cases payment of the account was but once a year, after harvest. However, these same customers would use the mail order houses for merchandise and pay cash.

With the coming of the chain stores, such as, the J. C. Penney Co., Sears, and Ward's retail stores, in the late 1920's and early 1930's, cash terms were the practice. The limited variety stores, such as Woolworth's and Ben Franklin's, also had terms of cash and carry. These stores did not use the advertising media as much as the home owned stores and relied on cheap goods at a fast turnover.

7. Fabric business. Independent stores during the twenties displayed and advertised their fabrics. Silks, satins and velvets in 18 inch widths were popular as were georgette crepes, linens, rayon jersey and rayon faille fabrics. Wool challis in 27 inch width and fine unfinished worsted in 36 inch width were available in retail stores. Cotton percales were big business at 15 cents a yard. They were used for aprons, house dresses and shirts. The ready-to-wear garments had not replaced the home and tailor made garments yet. In the 1930's the piece goods business increased in style, quality and color. Fabrics of excellent quality were available at reasonable prices. While colors were not as extensive as in metropolitan areas there was an excellent selection. Rayons came into their own and began



to hurt the cotton and wool industries. In the 1935 to 1940 period the effect of ready-to-wear was felt in the piece goods department of the store and then with war imminent, speculation on the market caused a shortage and hardship in getting piece goods.<sup>25</sup> During this period, with piece goods not available, people had to resort to ready-to-wear and as a result, ready-to-wear replaced piece goods in importance.

Summary. Fabrics were an item of trade in Montana since the time of the early explorers. They continued to be a staple item, freighted into Montana up the Missouri River to Fort Benton, brought overland from Walla Walla and from Salt Lake City. This business in fabrics as in other articles was dependent upon the wants of the Indians until the discovery of gold. Business in retailing grew with the increased demands from the gold miners, later, the cattle and the sheep men. Sheep farming began to increase rapidly and Montana became one of the largest wool growing states in the country. In the retail business, fabrics were always considered a staple item. Business in fabrics continued good until World War II when speculation on the market resulted in the scarcity of piece goods and brought ready-to-wear garments to the fore.

25. R. G. Bailey, purchaser for the Missoula Mercantile 1921 to 1959. Information received in an interview.

## Chapter III

### Manufacturing

#### I. Manufacturing in the United States.

A. Home manufactures. The fabric manufacturing industry of this country began in the New England states in the settlements of the Pilgrims and the Puritans. Each household carried on the entire process of manufacture, from the production of its own raw material to the converting into the finished article. This limited supply of goods was supplemented by the importation of English manufactured goods. The Industrial Revolution in England took the production of fabrics out of the home and into factories where the power operated machinery could produce a greater volume. The Colonies provided an excellent market for English goods and because of this, the Crown resented any attempt on the part of the Colonies to manufacture their own clothing. The government through legislative steps tried to stop the attempt to establish manufactories in wool and linen as well as silk but wanted the raw material raised in the Colonies and manufactured in England. These government regulations only stimulated the Colonists to further their attempts to develop manufactories. The resistance began when communities formed organizations to promote manufacturing outside the home to employ the poor people of the community to spin yarn.<sup>1</sup>

1. Frances Little, Early American Textiles, (New York, 1931), p. 64.

The first step away from family production was the hiring of an itinerant weaver, or a person of the village delegated to go from home to home to do the weaving. The shop system began when linen manufacturers advertised and purchased yarn to be woven in factories. This system was reversed with the establishment of the cotton mill which spun the yarn and then sent it out to country weavers.<sup>2</sup>

B. Power Manufacturing in the U. S. The first water-power cotton mill that was successful was started by Samuel Slater in Pawtucket, Rhode Island in 1790. Slater had recently arrived from England where he had finished seven years of apprenticeship to Jedediah Strutt who was the partner of Arkwright, the inventor of the water-power machinery for spinning cotton yarn. Because England had laws against the exportation of textile machinery and the emigration of mechanics, Samuel Slater memorized all the details of the machinery and came to the United States as a farmer. He contracted to build the machines necessary for "spinning cotton by water-power, of which the Samuel professes himself a workman, well skilled in all its branches."<sup>3</sup> Slater built a series of machines with which he was able to spin the finest of cotton yarns. So successful was he with his mills that when President Jackson visited Pawtucket and saw the prosperity he wanted to see the man responsible for it.

2. Ibid.

3. E. H. Cameron. Samuel Slater, Father of American Manufactures. (Freeport, Maine, 1960), p. 46.

"President Jackson could think of but one title for a man with Slater's amazing record - he greeted him as the Father of American Manufactures."<sup>4</sup>

With the erection of Slater's mills a new era of inventiveness and power manufacturing in textiles was born in this country. The operation of the first power loom in the United States must be credited to Rowland Hazard, who began fulling, dressing and carding wool in 1803 at Rhode Island. Five years later he purchased four power looms invented by Thomas Williams of Newport. Hazard was the first to operate the spinning jenny by water power. In 1816 the factory was turning out yard wide cotton that resembled the fine cottons of India which had been imported in such great quantities. This Waltham, Massachusetts factory was the first in the United States to carry on the entire process, from the preparation of the raw material to the production of the finished article by power under one roof.<sup>5</sup>

The success of the cotton mills in New England spurred the Lynn Linen Spinning Factory Co. to be established in 1814 to do for linen what had been done for cotton. This factory successfully manufactured sail duck until the end of the war of 1812 when large importations of linen forced it out of business.<sup>6</sup> The linen industry has never been of any consequence since in the United States as cotton has

4. Ibid. p. 167

5. Little. p. 112, 119, 120, 123.

6. Perry Walton. The Story of Textiles. (Boston, 1912), p. 187.

replaced most of its uses.

Silk manufacturing in the 19 century aroused great interest and promised to be one of the major industries of the country. However, it achieved permanent establishment in only limited areas.

C. Expansion of industry. Cotton spinning began to develop in the South also at a fairly early date. In 1787 a cotton mill in South Carolina was built and in the same year the Baltimore Manufacturing Co. attempted to manufacture cotton, linen and wool. A horse power mill was started in 1809 in Kentucky and a water power mill at Petersburg, Virginia and Nashville, Tennessee. However, the industry did not develop much until after the Civil War. By 1880 the southern mills were using 12% of the total amount of cotton consumed in the country and in 1910 increased to 45%. The South practically controlled the trade with China in cheap goods for this country by 1912.<sup>7</sup>

The New England States according to the 1909 census still produced the largest amount of goods dollar wise. The twelve leading textile centers of the United States according to production were: Philadelphia, Pa., \$153,000,000; Lawrence, Mass., \$70,000,000; Falls River, Mass., \$56,000,000; New York, N. Y., \$52,000,000; Paterson, N. J., \$50,000,000; New Bedford, Mass., \$44,000,000; Lowell, Mass., \$41,000,000; Providence, R. I., \$37,000,000; Manchester, N. H., \$23,000,000;

7. Ibid. p. 190-191.

Pawtucket, R. I., \$23,000,000; Woonsocket, R. I., \$20,000,000; Amsterdam, N. Y., \$17,000,000.<sup>8</sup>

D. Changes in power used. Machinery used was built on the same principles of the early inventors and developers, but the water power utilization was increased by the introduction of the turbine, making it possible to increase the size of the factories. The capacity in 1916 of the water wheels used in the Lowell Corporation was 29,943 horsepower.<sup>9</sup>

The introduction of steam power by 1875 had replaced water power and the major locations of mills now were in the coastal areas where tide water coal was available and there was cheap labor. By 1900 most mills in central New England were using steam power because of lack of sufficient water power except in the spring run off. By 1925 the power had changed again to electricity. This power was more reliable and many companies converted with more than one power source so that transfer to other lines was readily available should one fail. Electricity also released capital from power plants to production of goods.<sup>10</sup>

The use of electricity in manufacturing made it possible to manufacture in other areas. This resulted in the manufacture of raw material in the South, while New England maintained the largest number of finishing plants due to the proximity to the New York market which was capitalized as high as

8. Ibid., p. 211

9. J. Herbert Burgy, The New England Cotton Textile Industry, (Baltimore, 1932), p. 95-98.

10. Ibid., p. 108.

one cent a yard in some instances. The southeast sent approximately 75 percent of its goods to be finished in New England.<sup>11</sup>

The severe effect of southern competition was delayed until 1921 due to abnormal war-time demand. This competition plus the post-war slump, over-production, changes in methods of buying and style adjustments caused many older mill owners in New England to liquidate and marginal mills to fold. Massachusetts was surpassed in manufacture of cotton by North Carolina in 1927 as a result of the 48 hour labor law.<sup>12</sup>

E. Use of man-made fibers. The New England cotton industry also felt competition from a new industry in the early twenties, that of rayon yarns used as raw material for the weaving industry. Substantial development of man-made yarns took place in 1927 with the introduction of crepe twist in rayon which permitted this yarn to be used for softer dress fabrics.<sup>13</sup> By 1931 five companies were producing rayon and acetate with the viscose process accounting for 88% and acetate process 9% with the remaining 3% in cuprammonium and nitro processes.<sup>14</sup> The looms producing

11. Ibid., p. 126-128.

12. Ibid., p. 220.

13. Melvin T. Copeland, W. Homer Turner. Production and Distribution of Silk and Rayon Broad Goods. (New York, 1935), p. 18.

14. The United States Institute for Textile Research Inc. Textile Research. A survey of Progress. Technology Press. (Boston, 1932), p. 179-182.

silk, rayon, or silk and rayon goods were largely interchangeable. This led to manufacturers changing overnight from one raw material to another or a combination of raw materials as fashion dictated.<sup>15</sup> In the period 1925 to 1935 the cutting up industry\* increased in importance to such an extent that producers of rayon and silk goods were selling most of their goods to this outlet.<sup>16</sup>

F. Integrated Industry. In 1929 Homer Loring, textile financier, started the first integrated business when he formed the Merchants and Manufacturers Inc. by securing control of selling and converting houses and planned to purchase finishing plants and cutting up factories.<sup>17</sup> This started the integration movement in the textile industry which by the forties experienced unprecedented expansion. Mergers are popular in prosperous periods and from 1930 to 1948 there were "374 mill acquisitions leading to horizontal integration, 109 to inter fiber integration and 127 to vertical integration. Despite the disappearance of 655 firms, the total number of firms increased by more than 40%.... More New England than southern mills were purchased from 1943 to 1947; but from 1948 to 1952 the purchases were more largely of southern mills."<sup>18</sup>

15. Copeland, p. 9.

\* Ready-to-wear garment Manufacturing.

16. Copeland, p. 18.

17. Burgy, p. 222.

18. Conference of New England Governors. 1951-52. Committee on the New England Textile Industry. New England Textiles and the New England Economy. p. 54.



The southern mills had a larger proportion of new or modernized equipment and were better able to produce at a level constant with minimum cost than New England mills with 25% of their equipment and machinery needing replacement. Statistics on transfers reveal that New England and the North were investing heavily in transfers of ownership of southern mills and that there was more interest absolutely and relatively in purchase of southern mills than New England mills. There were several causes for this. The poor profit record of New England mills in the twenties and thirties caused her to lose ground in the competitive struggle,<sup>19</sup> and more incentives were held out to the northern manufacturers to move south by governors, mayors and chambers of commerce. Favorable taxes, low wages, larger work loads, more defense contracts for the South furthered the South's lead. Farm policies which caused the cost of cotton and wool to rise five times as much as man-made and synthetic fibers produced in the South furthered the competition. The heavy burden of unemployment payments and social security based on higher wages and lower work loads hampered New England and furthered the South's lead in the textile industry.<sup>20</sup>

Representatives of financial interests made clear a greater interest in southern textiles and a willingness to follow northern management southward. In the war years the

19. Ibid., p. 57.

20. Ibid., p. 69.

government was responsible for almost \$180 million new investments in synthetics and textile while excess capacity already existed. The government further encouraged textile expansion by allocating more scarce raw materials for construction to the textile industry than any other non-war industry. The rise in farm prices caused the prices of raw cotton and wool to rise five times as much as for rayon staples since 1928. This meant higher prices and reduced purchases in textiles, and for New England this meant not only effects of reduced purchases but also increased competition from synthetics. The development of man-made fibers not only reduces the market for woolens and worsteds in which New England specializes, but by increasing the pressure to introduce new machinery and plant, it accelerates construction and migration.<sup>21</sup>

G. Synthetic fibers. The development of synthetic fibers contributed to the merger movement in the textile industry to obtain end-product diversity for survival in the new inter fiber competition. Synthetics because of their functional properties are assured a substantial portion of the fiber market which will in part be attained at the expense of the wool and cotton fibers, thus reducing the importance of these fibers in the agricultural economy.<sup>22</sup>

Synthetics are now being manufactured in the South and will continue to be for economic reasons. Table V shows that

21. Ibid., p. 63-67.

22. Joseph Airov, Location of the Synthetic Fiber Industry. (New York, 1959), p. 12.

Table V

## Distribution of the Fiber Market according to Region

Fiber market Region	Market Weight
New England	12%
Middle Atlantic	20%
East South	36% )
Central South	22% ) 68%
West South	10% )

New England: Maine, Vermont, Mass., R. I., Conn.

Middle Atlantic: N. Y., N. J., Penn., W. Va.

East South: Va., N. C., S. C.

Central South: Georgia, Eastern Ala., Tenn., Kentucky

West South: West Alabama, Tenn., Kentucky, Miss., La.

Source: Location of the synthetic fiber Industry. p. 91.

68 percent of the fiber market is in the South as compared to 32 percent in the New England and Middle Atlantic States. Raw materials needed are within easy access and Virginia and West Virginia are the states where conditions are most favorable for production of raw materials and synthetics.<sup>23</sup>

"Southern textile mills are now producing about ninety percent of all apparel clothes made in this country. According to the Commerce Department, the South turned out in 1961 approximately ten billion yards of cotton, woolen, worsted and man-made fiber woven goods."<sup>24</sup>

H. Foreign competition. While the textile industry in the South continues to grow in synthetics, the national industry as a whole is not producing as large a volume in textiles due to the competition of the common market in Europe and the textile industry in Japan. As shown in Table VI production in all goods was down except for fine cotton fabrics and man-made fibers. The United States total for 1960 was down 400,000 units of 1,000 linear yards, from 1959.

## II World textile industry.

World production has gone up in all fibers except silk in the period 1940 to 1960 as shown in Table VII. In the United States, however, 1953 was the peak year for cotton while wool has never risen to its pre-war years and rayon has dropped from its peak of 1951. The cost of labor is affecting

23. Ibid.

24. American Fabrics. No. 61. (Summer, 1963), p. 100.

Table VI

## Cotton, Synthetics, wool and silk textiles

Production of cotton broad woven fabrics, except tire cord and fabric.

Fabric	1,000 Linear yards	
	1959	1960
Cotton		
Duck, and allied fabrics	223,462	204,575
Sheetings and allied coarse and medium yarn fabrics	2,600,700	2,482,295
Print cloth yarn fabrics	3,382,849	3,306,789
Colored yarn fabrics	519,731	455,270
Fine cotton fabrics	1,608,680	1,661,039
Napped fabrics, blankets and blanketing	205,870	205,196
Towels, toweling and dish cloths	571,626	547,829
Other woven cotton fabric specialties	491,759	465,286
	<u>9,604,678</u>	<u>9,328,279</u>
Rayon and/or Acetate broad woven fabrics		
100% filament	666,537	636,119
100% spun	308,941	215,069
Combination spun and filament	121,437	103,284
Pite upholstery, drapery, tapestry and tie fabrics	190,185	182,370
All other rayon or acetate mixture	331,303	292,202
	<u>1,618,403</u>	<u>1,428,044</u>
Other man-made fibers	836,277	939,252
Woolen and worsted woven goods	310,831	283,295
Silk, part silk and other fabrics	44,289	44,100
	<u>12,414,478</u>	<u>12,022,970</u>

Source: Association of cotton textile merchants of New York World Almanac, 1962.

these industries in competition with Europe and Japan where labor is cheap.<sup>25</sup>

The cost of wool and cotton in the United States is higher than on the World Market due to the U. S. Government subsidy program.<sup>26</sup> This situation gives the synthetic fiber industry even more of an advantage. The uses to which the synthetics are put are illustrated in Table VIII. In many cases they are being used in place of cotton or wool.

### III In Montana

A. Early fabrics in Montana. Early manufacture of fabrics in Montana was negligible. If fabrics were made here, they were produced as a home industry. The only fabric known to be produced was the leather skins used for garments by the Indians and some early settlers. The early population was unstable and would not support the manufacturing facilities for making cloth here with a small population.

B. Effect of sheep industry on manufacturing. Most fabrics were shipped into the territory of Montana. When the sheep raising industry in the state became sufficiently important manufacturing woolen fabrics in the place where wool was raised took the form of three different woolen mills in the state. "In 1877 the Montana Woolen Mills organized at Fish Creek. A woolen mill operated at Big Timber from

25. Needy Industries get Tax Break. Business Week. (Oct. 14, 1961), p. 32.

26. Wrong Kind of Help for Textiles. Business Week. (December 2, 1961), p. 148.

Table VII

## Cotton, wool, silk, rayon production, U. S. and World

Year	Cotton		Wool		Silk		Rayon	
	U. S.	World	U. S.	World	U. S.	World	U. S.	World
	Million	Million	Million	Million	Million	Million	Million	Million
	500 Bales	500 Bales	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
1940	126	312	4340	4210	130		4712	24,853
1945	90	211	3785	3825	24		7921	13,253
1949	161	313	2485	3925	47		9957	27,433
1950	100	283	2493	4045	42		12,594	35,454
1951	151	357	2540	4065	47		12,942	40,080
1952	151	358	2669	4380	59		11,358	35,350
1953	165	391	2745	4465	59		11,969	41,389
1954	131	386	2793	4610	58		10,857	44,900
1955	147	427	2829	4800	64		12,607	50,347
1956	133	422	2827	5080	69		11,479	53,617
1957	110	415	2727	5060	69		11,394	54,619
1958	115	445	2741	5340	75		10,349	50,284
1959	146	466	2944	5570	72		11,669	55,639
1960	143	469	3003	5540	66		10,285	57,484

Source: Agricultural Marketing Service; Statistical and Historical Research Branch U. S. Dept. of Agriculture. Cotton and wool from reports of the Dept. of Agri.; Silk and rayon from textile Organon, a publication of the Textile Economics Bureau, Inc.

Table VIII

## End uses of man-made fibers, 1951

End use	Yarn	Staple	Total
Other consumer-type products total	114.7	16.1	130.8
Linings and piece goods	91.8	15.0	106.8
Narrow woven goods	14.7	-	14.7
Yarn and thread	0.1	0.6	0.7
Men and boys apparel: total	47.1	97.8	144.9
Women and Misses apparel: total	261.5	102.2	363.7
Childrens and Infants apparel: T.	18.6	10.5	29.1
Household uses: Total	78.0	80.0	158.0
Industrial Uses: Total	409.5	16.2	425.7

Location of the synthetic fiber Industry. p. 87.

Source: Textile Inter-fiber competition, 1951, Textile Organon Vol. 24. August 1953: p. 134-139.

1902 to 1907 manufacturing wool blankets, and at Manchester another operated during the 1906 season. None were able to meet the competition of established mills in the industrial areas of the nation."<sup>27</sup> All discontinued operation.

Billings became a large wool and sheep center in the nineties, shipping 15 to 16 million pounds of wool annually to the eastern centers, chiefly Boston, Philadelphia and Chicago.

Since the second World War a new home industry, that of hand-loomed fabrics has started and grown in the state. This work is done by members of weavers' guilds in Montana and their products are sold in Montana art stores. These hand woven fabrics provide the individualistic touch that is now being sought in fashion.

Summary. The manufacture of fabrics in the United States evolved into a diverse fiber and integrated industry. The main manufacturing area which started in New England is in the newly industrialized South, where labor is yet unorganized and there are tax incentives. There are large companies in the industry now, selling yardage to piece goods retailers. With the integration of the textile industry many of the independent small jobbers have disappeared and each company has its own sales force.

Cotton and wool are the natural fibers of importance today with relatively little linen and some silk. The

27. Burlingame and Toole. p. 332-333.



synthetic fibers are increasing in use in all apparel and are replacing some of the natural fiber uses because of their functional properties.

The U. S. textile industry feels keenly the competition of Europe and Japan in its production and demand of the textile goods. Cost of fabrics has gone up due to government intervention in the way of farm and tax policies and tariffs.

Montana while a large wool growing state is far distant from the textile market and cannot compete in the manufacturing industry.

## Chapter IV

### Fabric Retailing 1947-1963 Analysis of Data

1. Introduction. At the end of World War II, there was a release of fabrics to consumers again as textile mills encountered declining orders from government, and as raw materials were widely available. The products on the market today are improved in quality, with new and better resin finishes which make fabrics wash and wear, wrinkle resistant, water proof, or insulated for easier care and more variety of uses in home sewing. The introduction of synthetic fibers has expanded the available fiber choices in fabrics from the four basic animal and vegetable fibers (wool, silk, cotton and linen) to a practically unlimited variety of fibers used alone and more recently in blends of two or more fibers.

2. Product and Price. A. Fiber classification and Price. 1. Cotton. The survey of Montana retailers revealed that all stores that carry fabrics, stock some cottons. These cottons ranged from the packaged goods or a few bolts of cotton in the small rural general merchandise and department stores to the full selection of cottons, such as denims, gingham, percales, cotton satin, homespun, corduroy, tarpoon and others, found in specialty and large department stores. 2. Linen. Linen stocks and sales have decreased in importance since manufactured cotton has replaced it to a considerable extent, and the manufacture of rayon to resemble linen in appearance and "feel" with the added property of crease

resistance. Of the 200 stores interviewed only 25 stores (or 12 percent of the total) carried any real flax linen as shown in Table IX. These 25 stores were the specialty and large department stores located in the larger Montana cities. Linen is a fabric dependent upon customers' esthetic value and therefore somewhat more costly than most cottons, ranging in price between \$1.29 and \$3.98 per yard as shown in Table X.

3. Silk. Silks are carried more extensively in stores than at a little earlier period and seem to be popular again. The silks are usually carried by the specialty stores, the larger independent department stores and such chains as McDonalds, Allied, Hennesseys, a few Penney stores and the larger Buttrey Department stores and Albertsons, 41 in number (or 20 percent of the total). Of the four types of silk surveyed there were enough samples to provide a price range for the silk fabrics found in Table X.

4. Rayon. Rayon fabrics are more commonly carried by stores than silk or linen. For example, 147 of the 200 stores (or 73 percent) carried rayon fabrics as regular stock. Acetate also is in this fabric class with 74 percent, or 149 stores carrying acetate fabrics as regular stock and the price range for sample fabrics are found in Table X. The acetate and rayon fabrics are the first man-made fibers to appear on the market and now enjoy public acceptance next only to cotton. This acceptance is due to low price and its finishes of wash and wear and wrinkle resistance. In some

Table IX

## Types of fabrics sold in stores

Cottons	200	100 %
Linen	25	12 %
Silk	41	20 %
Rayon	147	73 %
Acetate	149	74 %
Synthetics	136	68 %
100% wools	125	62 %
Wool blends	109	54 %

Source: Tabulation based on 200 stores.

Table X

Sample of Fabric Prices  
(Disregarding quality)

I. Cottons	Low	Most Popular	High
Percale (80 square)	.25	.49	.98
Chambray	.59	.79	1.11
Broadcloth	.49	.59	1.98
Terry cloth	.89	.98	1.98
Corduroy			
Plain	.79	.98	1.29
Print	1.00	1.19 † 1.29	1.98
Gingham			
36"	.39	.69	.98
45"	.69	.98	1.39
Pima Cotton			
Domestic	.69	.98	1.98
Imported	1.19	1.98	2.50
Home Spun			
Plain	.88	1.98	1.98
Printed	1.79	1.98	2.29
Denim	.50	.79	1.88
Sail Cloth or poplin	.39	.98	1.98
Velveteen	1.89	2.98	3.19
Organdy			
White	.39	.69	.89
Colored	.69	.69	1.29
II. Linen (Pure)	1.29	1.98	3.98
III. Silk			
Shantung	.98	3.98	5.50
Raw	1.69	1.79	11.95
Organza	.98	1.39	3.98
Taffeta	4.98	4.98	4.98

Table X (continued)

IV. Dacron	1.29	1.98	2.98
Dacron † cotton (blend)	.69	.98	1.98
V. Orlon	1.00	1.98 † 2.98	4.98
VI. Nylon			
Sheer and Chiffon	.69	.98	1.69
Net	.39	.49	1.49
Tulle	.59	1.00	1.99
Organdy	.59	.98	1.98
VII. Lace			
Nylon	.79	.98	2.39
Cotton			
Domestic	1.19	1.95 † 2.98	2.99
Imported	2.29	2.98 † 3.98	5.95
Acetate † nylon (blend)	.89	1.98	2.98
VIII. Wool (100%)	1.98	2.99	19.95
Wool † Nylon (blend)	1.98	2.98	4.98
Cashmere † wool	4.00	5.98	25.00
Mohair † wool	2.98	4.98	10.98
IX. Acetate			
Sheath lining	.59	.79	.89
Brocade	.98	1.98	15.00
Satin	.59	1.98	5.98
Taffeta	.59	.69	1.98
Crepe	.69	1.98	2.29
Millium lining	.98	1.69	1.98
Arnel	1.00	1.98	2.50
Estron	1.00	1.69	1.98
X. Rayon			
Sarno, Sredo and linen finish	.59	1.39	2.98
Twill lining	.69	.79	.98
Velvet	2.19	2.98 † 3.98	8.50
Shantung † blends	.79	.98	2.59

cases the rayon and acetate fabrics can be produced and sold for less than quality cottons.

5. Synthetics. Synthetics such as polyester fiber (dacron), nylon and acrylic (orlon) fibers are being accepted in the piece goods business very well and rank fourth in popularity with 136 stores carrying them (or 68 percent of the 200 stores). Synthetics are competitively priced in relation to better quality cottons, rayons and acetates, the lowest being \$.69 to the high of \$4.98 per yard as shown in Table X. Only the smaller stores in the less populated areas are not carrying these fabrics but are concentrating on cottons, which is demonstrated by a comparison of the percentages of rayon and acetate as well as synthetics in Table IX.

6. Wool. The stocking and retailing of wool in Montana presents an interesting situation unique to our geographic location. Montana is on the border of Canada which produces beautiful and comparatively inexpensive wool of excellent quality. Because of the close perimeter to Canada, the stores along the northern area of the state known as the High Line, do not stock wool heavily as regular stock because the wool trade goes to Canada. However they do invest more in cottons which attract the Canadian trade. In the summer of 1963 Canada restricted the amount of goods that could be brought back into Canada to \$25.00 per trip. Cottons are still being sold but not in as great a quantity

as before. Wools, also, are more expensive to stock. Sales turnover by these stores is difficult to achieve.

Many home sewers express a need for more experience in sewing before investing their money in the more expensive fabrics. Due in large part to an overall lack of advanced and adult education along this line there is not an effective demand for wool that there is for less expensive fabrics. However, 62 percent of the stores surveyed do stock wool and 54 percent the wool blends. The stores with large 4-H business are now moving more to 100 percent wool because of the demands of the 4-H groups for this wool. Also, stores such as Penney's are now stocking Penney's own 100 percent washable wool, eliminating the need for blended fabric wool. The larger independent stores all stock wools and many smaller stores in the central and southern part of the state are increasing their supply for fall and winter. Prices for wool range higher on the whole than other fabrics, starting at \$1.98 and going as high as \$25.00 a yard for cashmere wool. All specialty and large department stores stock some wool of the more expensive variety with smaller stores and chains stocking the less expensive wool in more popular price ranges of \$2.98 to \$5.98 a yard as shown in Table X. Thus, the availability of the different fibers is shown in Table IX, while popular price and high, low prices are illustrated in Table X, with method of display of piece goods found in Table XI.

Table XI

Display of piece goods in their fabric departments of stores.\*

Type	No. of Stores	%
Bolts	180	90
Short lengths	50	25
Promotion short lengths	87	43
Skirt lengths	43	21
Packaged Goods	20	10

\*Total over 100 due to multiple display of peice goods by particular Stores.

Table XII

Sources from which Fabrics are purchased.\*

	No. of Stores	%
Salesman on the road	83	41
Company sample books	52	26
Buying Associations in N. Y.	20	10
Goods shipped in by company	19	9
Company warehouse	32	16
<u>Markets visited</u>		
Minneapolis, Minn.	27	13
Clara City, Minn.	16	8
New York	9	4
West Coast	2	1
Salt Lake	2	1
<u>Wholesalers</u>		
Billings Dry Goods	16	8
Montana Dry Goods, Great Falls	6	3
Denver	5	2
Spokane	4	2

\*Some Stores use more than one source of goods.



B. Method of display. Stores either had some bolt goods or stocked only the packaged cotton goods. Only 10 percent (or 20 stores) stocked packaged goods while 90 percent or (180 stores) carried some bolt goods with smaller stores carrying short lengths or mill ends to provide a larger variety with less investment. Skirt lengths were also stocked and in some cases these skirt lengths were the only stock of woollens smaller stores felt they could sell because of the size of the town and the buying habits of their customers.

3. Distribution channels. A. Stock acquisition methods. The manufacture of fibers into cloth involves various stages, after which marketing channels sell and resell these products. After the manufacture of gray goods the piece goes to the finisher and then to the converters who distribute their lines to jobbers or sales representatives. Jobbers and sales representatives then travel a territory and show their lines of goods for the retailer to select his stock. This is one way for the retailer to acquire stock for his store and of the 200 stores interviewed 83 (or 41 percent) used this method to acquire some of their fabric stock. Company sample books ranked second in use for acquiring stock with 52 stores (or 26 percent as shown in Table XII. Company sample books are made of samples of fabrics that the company piece goods merchandiser has selected for his chain store operation. From these samples and price lists the individual store piece goods man selects

the types of fabrics he feels will sell in his location. Other chain operations and some cooperative buying associations of independent stores use a warehouse method of stocking fabrics. (See Table XV). These groups 32 in number (or 16 percent meet in a market city and select fabrics shown to the group, receiving a quantity discount price for shipments of goods then stored in a warehouse in a central location until used by the group or drop shipped to the store direct from the mill or converter. Some piece goods businesses, 20 (or 10 percent now make use of a buying office in New York to select goods that are "hot numbers" and also to select regular stock. These offices maintain a representative in the urban markets all year long to be able to provide information and stock on short notice and help the buyer select items on quick buying trips to the market. This method also provides a joint buying program which all big chains and major department stores regard as the major function of their New York buying office.<sup>1</sup> While New York is regarded as the main market for piece goods, other meeting places for new lines of fabrics are Minneapolis (with 13 percent), Clara City, Minnesota (with 8 percent), West Coast (Seattle and San Francisco with 1 percent) and Salt Lake (with 1 percent). These are generally buying groups meeting for a chain or an independent buyers cooperative where the representatives from mills bring their line

1. National Retail Merchants Association. p. 13.

samples and take orders.

Some retailers use a wholesale house within a reasonable distance to their business. In Montana there are two wholesale houses, one located in Great Falls (Montana Dry Goods) which carries only the packaged four yard dress lengths and skirt lengths, and one located in Billings (Billings Dry Goods) which carries a line of cotton bolt goods and packaged Dan River fabrics. The latter has sales representatives who travel the state and take orders and conduct drop shipment on other fabric lines. The Billings Dry Goods does provide the only local source for a full line of fabrics for the retail fabric store in Montana; 8 percent of stores surveyed use this supplier. The closest out-of-state source for western Montana stores is Spokane, Washington, with four western Montana stores buying from it. Denver, Colorado also has a wholesale house used by some of the stores in the middle or eastern part of the state. Five stores use this outlet as shown in Table XII.

B. Major buying periods. In Table XIII buying seasons of fabric dealers are tabulated. It shows that 134 (or 67 percent) of the stores do buy from their sources at least twice a year, in spring and fall, with "fill-in" orders as needed. For a four season year, fall, Holiday, spring and summer, only 45 (or 23 percent of the stores made a definite large buying order and adjusted their stock according to four season year. Stores where the company shipped in their

goods and small stores that carried a few basic plain color percales did not buy for any season, but only when needed and were eight in number (or four percent) and four stores (or two percent) bought only once a year, seemingly not paying attention to season either. A three season year (fall, Holiday, and spring) had nine (or four percent) of the stores buying orders. Therefore only 54 stores in the larger populated areas had any need for special Holiday fabrics while twelve stores were too small for any season buying as shown in Table XIII.

C. Store Classification. The 200 stores interviewed were divided into department, general merchandise, limited variety and specialty stores, categories as defined earlier. (See Table XIV). 1. Department stores. Department stores accounted for 137 of stores visited, of which 123 were in county seats and 18 in other towns; 61 were independent stores, 47 in county seats and 14 in other towns, 80 were chain stores, 76 in county seats and four in other towns. Table XV demonstrates that only the department stores in the chain classification were in towns other than county seats. It appears that chain organizations are interested in towns only with a large trade already established and have not ventured into areas where the business is not already defined. Chain stores will also leave towns where the economy is moving backward, that is, particularly declining in population or in sales, pushing that economy even further

Table XIII

Number of Buying Seasons for which fabrics were ordered.

No. of Seasons	No. of stores	%
no season	8	4
1	4	2
2	134	67
3	9	4
4	<u>45</u>	<u>23</u>
	200	100%

Table XIV

Distribution of stores by location

Types of Stores	County seats	Other towns	Totals
Department	120	17	137
General Merchandise	23	14	37
Limited Variety	12	2	14
Specialty	<u>10</u>	<u>2</u>	<u>12</u>
	165	35	200

Source: Tabulation based on 165 stores in county seats and 35 stores in other than county seat towns.

backward. The chains promote active price, product, and promotion competition with already established independent stores, occasionally forcing the small independent merchants out of business. 2. General Merchandise. In the general merchandise category, 25 stores were independents, 11 of them located in small county seats of 1200 or less, and 14 in even smaller towns with limited trade. Of the chain general merchandise stores all seven were in county seats of larger population, Billings, Great Falls, Bozeman, Missoula, Butte, Helena and Anaconda, and all of them were of the shopping center super store variety with Buttreys super stores leading in number. Of the total General merchandise stores 18 were in county seats and 14 in other towns.

3. Limited variety. Most of the limited variety stores were of the chain store organization. Chain stores accounted for 11 out of the total 15, with all 11 in county seats. The independent variety stores had two in county seats, both small towns and two in other small towns.

4. Specialty stores. All the specialty fabric shops are independent stores, with two in towns other than county seats in western Montana. The fabric shop locations are Missoula, Ronan, Whitefish, Libby, Great Falls, Glasgow, Circle, Bozeman, Helena, Butte, and Billings which had two such stores. These towns all have a population of 2,000 or more, up to 55,000 as shown in Table XVI, except Circle

Table XV

Distribution of Retail fabric stores in Montana according to location and category

<u>Independent Stores</u>	County seats	Other towns	Totals
Department	47	14	61
General Merc.	11	14	25
Limited Variety	2	2	4
Specialty	10	2	12
	<hr/> 70	<hr/> 32	<hr/> 102
 <u>Chain Stores</u>			
Department	76	4	80
General Merc.	7	0	7
Limited Variety	11	0	11
Specialty	0	0	0
	<hr/> 94	<hr/> 4	<hr/> 98

Source: Survey of 200 Retail Stores in Montana.

Types of co-op buying organizations used by independent stores and 2 chain stores

Gambles	5	5	10
V store at Clara City	15	5	20
Skogsmo	3	1	4
	<hr/> 23	<hr/> 11	<hr/> 34

Sources: Survey of 200 Retail Stores in Montana.

## Table XVI

## Sample Survey

THIS TABULATION LISTS COUNTY SEATS  
IN ORDER OF THEIR SIZE OF POPULATION  
Census, 1960

Counties	County Seats	Population
1. Cascade	Great Falls	55,357
2. Yellowstone	Billings	52,851
3. Silver Bow	Butte	27,879
4. Missoula	Missoula	27,090
5. Lewis & Clark	Helena	20,227
6. Gallatin	Bozeman	13,361
7. Deer Lodge	Anaconda	12,054
8. Hill	Havre	10,740
9. Flathead	Kalispell	10,151
10. Custer	Miles City	9,665
11. Park	Livingston	8,229
12. Fergus	Lewistown	7,408
13. Dawson	Glendive	7,058
14. Valley	Glasgow	6,398
15. Powell	Deer Lodge	4,681
16. Richland	Sidney	4,564
17. Glacier	Cut Bank	4,539
18. Toole	Shelby	4,017
19. Beaverhead	Dillon	3,690
20. Roosevelt	Wolf Point	3,585
21. Musselshell	Roundup	2,842
22. Lincoln	Libby	2,828
23. Big Horn	Hardin	2,789
24. Pondera	Conrad	2,665
25. Ravalli	Hamilton	2,475
26. Fallon	Baker	2,365
27. Blaine	Chinook	2,326
28. Lake	Polson	2,314
29. Carbon	Red Lodge	2,278
30. Phillips	Malta	2,239
31. Sheridan	Plentywood	2,121
32. Rosebud	Forsyth	2,032
33. Teton	Choteau	1,966
34. Chouteau	Fort Benton	1,887
35. Wheatland	Harlowton	1,734
36. Daniels	Scobey	1,726
37. Sweet Grass	Big Timber	1,660
38. Broadwater	Townsend	1,528
39. Meagher	White Sulphur Sps.	1,519
40. Jefferson	Boulder	1,394
41. Stillwater	Columbus	1,281
42. Sanders	Thompson Falls	1,274



Table XVI (continued)

Counties	County Seats	Population
43. Mineral	Superior	1,242
44. Liberty	Chester	1,158
45. Prairie	Terry	1,140
46. McCone	Circle	1,116
47. Granite	Philipsburg	1,107
48. Wibaux	Wibaux	766
49. Carter	Ekalaka	738
50. Powder River	Broadus	628
51. Judith Basin	Stanford	615
52. Garfield	Jordan	557
53. Treasure	Hysham	494
54. Petroleum	Winnett	360
55. Golden Valley	Ryegate	314
56. Madison	Virginia City	194

Table XVI (continued)

Counties	County Seat Stores	other stores interviewed	Population
1. Cascade	11	1 Belt	757
2. Yellowstone	11	2 Laurel	4601
3. Silver Bow	6		
4. Missoula	9		
5. Lewis & Clark	6	2 Lincoln	250
		Augusta	475
6. Gallatin	6	3 Belgrade	1,057
		Manhattan	889
		Three Forks	1,161
7. Deer Lodge	4		
8. Hill	4	2 Gilford	340
		Rudyard	521
9. Flathead	6	3 2-Whitefish	2,965
		Columbia Falls	2,132
10. Custer	5		
11. Park	4		
12. Fergus	4		
13. Dawson	4		
14. Valley	4	2 Hinsdale	350
		Frazer	575
15. Powell	2	2 Avon	200
		Ellison	200
16. Richland	3		
17. Glacier	3	2 Browning	2,011
18. Toole	2		
19. Beaverhead	3		
20. Roosevelt	2	2 Culbertson	919
21. Musselshell	3		

Table XVI (continued)

Counties	County Seat Stores	other stores interviewed	Population
22. Lincoln	3	2 Eureka	1,229
23. Big Horn	3*		
24. Pondera	2		
25. Ravalli	3	3 Darby	415
		Corvallis	315
		Stevensville	784
26. Fallon	2		
27. Blaine	3	1 Harlem	1,267
28. Lake	2	3 Ronan	1,334
29. Carbon	3		
30. Phillips	4		
31. Sheridan	2	1 Medicine Lake	452
32. Rosebud	2		
33. Teton	2		
34. Chouteau	2		
35. Wheatland	1		
36. Daniels	2	1 Flaxville	262
37. Sweet Grass	2		
38. Broadwater	3		
39. Meagher	1		
40. Jefferson	1		
41. Stillwater	1*		
42. Sanders	1*	1 Plains	769
43. Mineral	2	1 Alberton	326
44. Liberty	1		
45. Prairie	2*		
46. McCone	3*		
47. Granite	0*		
48. Wibaux	1		
49. Carter	2		
50. Powder River	1*		
51. Judith Basin	1		
52. Garfield	1*		
53. Treasure	2		
54. Petroleum	1		
55. Golden Valley	1*		
56. Madison	0*	1 Sheridan*	
	155	35	200 Total

\* Done by Questionnaire 4 did not reply.

All towns in the state 2000 and over were interviewed. Many under that.

Table XVII

Location of Retail fabric stores in Montana according to types and names

	County seats	Other towns	Totals
Independent stores	71	31	102
Chain stores	94	4	98
1. Penney's	29	2	31
2. Anthonys	10	2	12
3. Buttreys	9		
4. Vaughn & Ragsdale	9		
5. Woolworth	6		
6. McDonalds	5		
7. Gambles	4		
8. Montgomery Wards	4		
9. Hested	3		
10. Sears	2		
11. Hennessys	2		
12. Allied	2		
13. S & L	1		
14. Sprouse Reitz	1		
15. Kress	1		
16. Krege	1		
17. Safeway V store	1		
18. Albertsons	1		
19. Supersave V store	1		
20. Grand Silver	1		
21. W. T. Grant	1		

Source: Tabulation based on 165 stores in county seats and 35 stores in other than county seat towns.

and Ronan, with 1,116 and 1334 respectively, but with a large rural area population of trade.

5. Co-op group. Among the independent stores it was found that some retailers belonged to Co-op buying organizations and used the organization name in connection with their store name. The three cooperative groups consist of Gambles, Skogmos (which is a division of Gambles) with main headquarters in Minneapolis and the V-Stores, Inc, had 20 stores (or 60 percent of the stores that belonged to a co-op category. Of the twenty, fifteen were in county seats and five in other towns. The Gambles Co-op stores were second in number with ten, five in county seats and five in other towns. Skogmo stores had a total of four, with three in county seats and one in another town.

6. Independent and chain category. In Table XVII, the location of retail fabric stores according to types and names is shown, 102 were independent stores of which 71 were in county seats and 31 in other towns. The chain stores had a total of 98 stores with 94 in county seats and four in other towns. The chain organizations that were visited are listed as to number of stores in each chain, Penney's having the largest number of 31 stores.

C. Dates of Establishment. Eleven stores in Montana which were established before 1900, are still operating and still selling fabrics. These stores are listed in Table IV, Chapter II. Between 1900 and 1930, 65 stores (or 32 percent

of the stores interviewed were established as shown in Table XVIII. This was the beginning of many of the chain stores in Montana, notably the Penney stores, the Golden Rule stores which were later on absorbed by Penneys, the Woodward stores which were bought by the Anthony Co. In the period 1931 to 1940 only 23 stores (or 12 percent) were started because of the depression of the Thirties and the imminence of the war in the early Forties. From 1941 to 1950 there was an increase in the number of stores, 30 in number (or 15 percent). Most of these stores were actually started from 1945 to 1950. The advent of the new suburban shopping centers has resulted in an increase in stores in the 1951 to 1960 period with 40 stores starting. The fabric specialty shops also made their appearance in Montana during this period and continued to grow in number after 1960 to 12 stores. Thirty six percent of the 200 stores started to sell fabrics in the post war years due to better methods of handling fabrics. There appeared packaged goods such as dress lengths, skirt lengths and mill ends which the smaller stores and limited variety stores were now willing to stock because they did not tie up so much capital in yardage as had been the case with 18 to 30 yard bolt goods. Cooperative buying organizations have encouraged smaller stores to stock some bolt fabrics because of the group buying prices available through the organization. Gambles wholesale did not stock "soft lines" until 1945. This chain has now

Table XVIII

Dates of establishment of fabric depts. in stores		
		%
Before 1900	11	5
1900-30	65	32
1931-40	23	12
1941-50	30	15
1951-60	40	20
Since 1961	31	16

Table XIX

## Location of the Store in the Town

Downtown	No. of Stores	%
Main Street	160	80
Off Main Street	21	11
Shopping Center	19	9
	<hr/> 200	<hr/> 100%

## Location of the Piece Goods Dept, in the Store

Main Floor:	No. of Stores	%
Front Center	14	7
Front Side	56	28
Back Center	20	10
Back Side	40	20
Mid Center	17	8
Separate area	3	2
	<hr/> 150	<hr/> 75%
Basement	28	14
Upstairs	10	5
Total Store	<hr/> 200	<hr/> 100%

gone into a full line of fabrics in their new shopping centers, The Tempo stores.

D. Location of stores in communities. The survey showed that 160 (or 80 percent of the stores were in the downtown shopping district and on the main street of traffic. Off the main street but still in the downtown area were an additional 21 stores (or 11 percent) giving the downtown shopping area a total of 171 stores (or 91 percent), with the remainder small proportion of 19 stores (or 9 percent) in the shopping centers as shown in Table XIX. Montana, as of 1963, has not developed large numbers of shopping centers as in more populated states.<sup>2</sup>

E. Location of fabric departments. The location of the piece goods department in the stores presents an interesting pattern, in that the stores doing a bigger volume were generally on the main ground floor in front. The total, 150 stores (or 75 percent) had the piece goods department on the main floor. This, however, can be misleading in that the smaller rural stores had only one floor in which all merchandise was displayed. Second in number was the basement location with 28 stores (or 14 percent). The survey indicated that people are more willing to go down stairs than up stairs. Only 10 stores (or five percent) were upstairs and 12 stores (or 6 percent) were the total of specialty stores.

4. Advertising and promotion. A. Manufacturer's

2. Visits to Minneapolis, Seattle and California cities.

advertising. The large manufacturers of the United States have discovered that they must advertise and promote their own fabrics in order to provide a market for them. This is the reason for brand names for all synthetic fiber fabrics and also special brand names for various types of other fabrics. These manufacturers pay 50% of cost of all the advertising that mentions their fabrics and brand, by name.<sup>3</sup> From this promotion effort by the manufacturing companies has come some real information on new fabric development. Women are now buying fabrics by brand name. The Wool Growers Association has developed methods for promoting United States made woolens and the cotton council has furthered the sale of cotton fabrics by special promotion through newspapers.<sup>4</sup> The chemical companies which produce synthetics have their own promotion staffs.

B. Montana advertising. Actual printed advertising in Montana of fabrics has not been extensive. The fact that turnover rate in piece goods for Montana averages at 3.1 and the gross margin is 33 percent, the department stores will advertise items of higher profit and faster turnover. The result of this seeming indifference to fabrics by the department stores has been a trend toward specialty fabric shops, selling fabrics as their main merchandise.

C. Store advertising. 1. Promotions. Now that

3. Mr. L. C. Stephens. Missoula Mercantile Merchandise manager. Information in an interview.

4. Times, (weekly newspaper in Missoula.) C. J. Doherty, editor and publisher from 1931 to 1957.

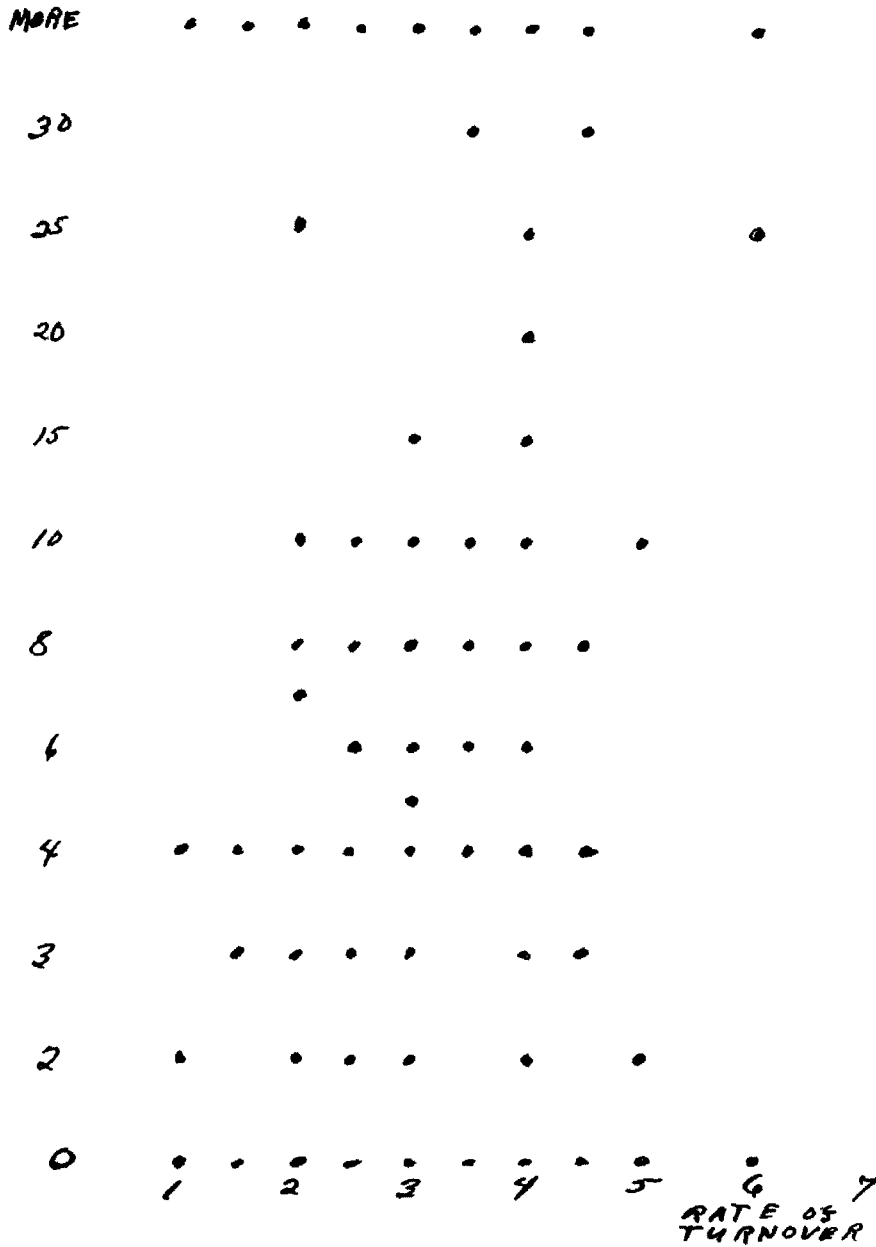


Table XX

## Use of Window display advertising

Times per year	No. of stores	Percent
0	39	20
2	31	15
3	19	9
4	30	15
6	24	12
8	5	2
10	6 (52)	3 (27%)
15	7	4
20	2	1
25	7	4
More	30	15
	200	100

WINDOW DISPLAY PLOTTED TO PIECE GOODS TURNOVER  
NUMBER OF WINDOW DISPLAYS



fabrics are handled as a fashion item the stores must turn over its fashion merchandise at least twice a year, in the spring and in the fall as shown in Table XIII. This necessitates sales of the merchandise at reduced prices that didn't move out during the season. Along with the season goods some stores bring in short lengths or mill end goods for a low price to get the traffic in the store necessary to move most of the stock out. Another way to move slow stock is to cut a few dress lengths off the piece and place them on the remnant table. This calls attention to the fabric and moves it off the bolt. These seasonal sales are the few times that the department stores do use the newspaper advertising for piece goods.

2. Window displays. Stores rely more heavily on window displays for their advertising during the greater part of the year. This is illustrated in Table XX which shows that 80 percent of the stores had window displays on fabrics at least twice a year. Managers in 39 stores (or 20 percent did not consider it necessary to advertise in the window, because they displayed their fabrics very prominently just inside the entrance door to the store or they had no window in which to do any display advertising. Most of the stores displaying fabrics eight times a year or less had very limited window space or were small stores with not too extensive selection. Stores displaying ten or more times a year were the chain stores, large department stores and the specialty stores. In Ex. 4 graph, window display was plotted

Table XXI

Distribution of Retail Fabric Stores in Montana  
according to Annual Stock value of fabrics, 1963

Stock Value in \$1,000	All Stores		Dept.				Gen. Merc.			
	No.	%	Chain		Indep.		Chain		Indep.	
	No.	%	No.	%	No.	%	No.	%	No.	%
.5 or less	38	19	1	1	14	7	2	1	13	7
.5 - 1	25	12	7	3	10	5	1	0	7	4
1 - 2	23	11	2	1	13	6	1	1	5	2
2 - 3	19	10	7	3	9	5	2	1	0	0
3 - 4	18	9	14	7	3	1	0	0	0	0
4 - 5	7	3	4	2	0	0	0	0	0	0
5 - 6	5	2	5	2	0	0	0	0	0	0
6 - 7	8	4	6	3	1	0	0	0	0	0
7 - 8	5	2	5	2	0	0	0	0	0	0
8 - 9	8	4	5	2	1	1	0	0	0	0
9 - 10	13	7	7	3	4	2	1	1	0	0
11 - 15	9	5	5	3	2	1	0	0	0	0
16 - 20	6	3	2	1	2	1	0	0	0	0
21 - 25	3	1	2	1	0	0	0	0	0	0
26 - 30	5	3	4	2	1	1	0	0	0	0
31 - 35	3	2	1	1	0	0	0	0	0	0
36 - 40	2	1	2	1	0	0	0	0	0	0
41 - 50	2	1	1	1	1	0	0	0	0	0
51 or more	1	1	0	0	0	0	0	0	0	0
	200	100	80	39	61	30	7	4	25	13

Stock Value in \$1,000	Limited Var.				Specialty	
	Chain		Indep.		Indep.	
	No.	%	No.	%	No.	%
.5 or less	5	2	3	1	0	0
.5 - 1	0	0	0	0	0	0
1 - 2	1	0	1	1	0	0
2 - 3	1	1	0	0	0	0
3 - 4	1	1	0	0	0	0
4 - 5	1	0	0	0	2	1
5 - 6	0	0	0	0	0	0
6 - 7	0	0	0	0	1	1
7 - 8	0	0	0	0	0	0
8 - 9	1	0	0	0	1	1
9 - 10	0	0	0	0	1	1
11 - 15	0	0	0	0	2	1
16 - 20	0	0	0	0	2	1
21 - 25	0	0	0	0	1	0
26 - 30	0	0	0	0	0	0
31 - 35	1	1	0	0	1	0
36 - 40	0	0	0	0	0	0
41 - 50	0	0	0	0	0	0
51 or more	0	0	0	0	1	1
	11	5	4	2	12	7

Source: Check list and Questionnaire for 200 stores in Montana.  
Spring, 1963.

Table XXII

Distribution of Retail Fabric Stores in Montana  
according to Annual Gross Value of fabrics sold, 1963

Sales value in \$1,000	All Stores		Dept.				Gen.		Merc.	
	No.	%	Chain		Indep.		Chain		Indep.	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 or less	35	17	0	0	12	6	2	1	13	7
1 - 2	12	6	3	1	4	2	0	0	5	3
2 - 3	12	6	2	1	5	3	0	0	5	2
3 - 4	16	8	4	2	11	5	1	1	0	0
4 - 5	10	5	2	1	4	2	1	0	2	1
5 - 6	5	3	0	0	3	1	0	0	0	0
6 - 7	3	1	1	1	1	0	0	0	0	0
7 - 8	8	4	4	2	3	2	0	0	0	0
8 - 9	4	2	2	1	1	1	1	0	0	0
9 - 10	6	3	5	2	1	1	0	0	0	0
10 - 15	19	10	10	5	6	3	0	0	0	0
15 - 20	13	6	11	5	2	1	0	0	0	0
20 - 25	12	6	8	4	1	0	1	1	0	0
25 - 30	7	4	3	1	1	1	0	0	0	0
30 - 40	13	6	9	5	3	1	0	0	0	0
40 - 50	4	2	3	1	0	0	1	1	0	0
50 - 75	9	5	4	2	1	1	0	0	0	0
75 - 100	5	2	4	2	1	0	0	0	0	0
100 - 125	2	1	1	1	1	0	0	0	0	0
125 - 150	4	2	4	2	0	0	0	0	0	0
Over 150	1	1	0	0	0	0	0	0	0	0
	200	100	80	39	61	30	7	4	25	13

Table XXII (continued)

Sales value in \$1,000	Limited Chain		Var. Indep.		Specialty Indep.	
	No.	%	No.	%	No.	%
1 or less	5	2	3	1	0	
1 - 2	0		0		0	
2 - 3	0		0		0	
3 - 4	0		0		0	
4 - 5	0		0		1	1
5 - 6	1	1	1	1	0	
6 - 7	1	0	0		0	
7 - 8	0	0	0	0	1	0
8 - 9	0	0	0	0	0	0
9 - 10	0		0		0	
10 - 15	2	1	0	0	1	1
15 - 20	0		0		0	
20 - 25	0	0	0	0	2	1
25 - 30	1	1	0	0	2	1
30 - 40	1	0	0	0	0	0
40 - 50	0		0		0	
50 - 75	0		0		4	2
75 - 100	0		0		0	0
100 - 125	0		0		0	
125 - 150	0		0		0	
Over 150	0		0		1	1
	11	5	4	2	12	7

Source: Check list and Questionnaire for 200 stores: Montana.

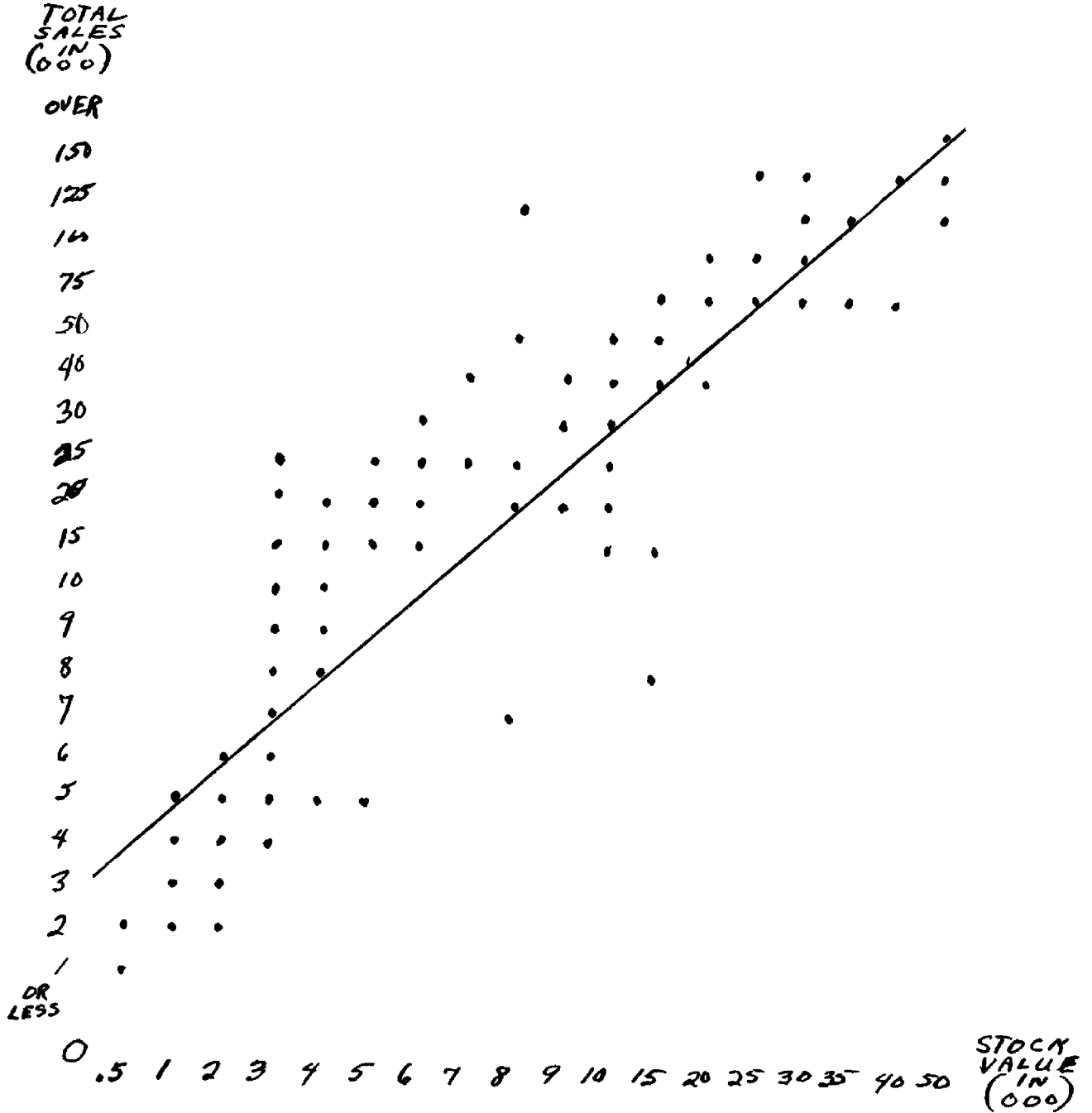
with sales value and it showed no pattern.

5. Stock, turnover, and estimated sales in cities vs rural areas. A. Stock value. The shift in population away from the farms and rural areas to urban centers and the increased ease in travel has created a difficult situation for the stores in rural areas or small towns. Most of the trade will travel a few more miles for any major purchase. This has prompted the small rural stores to carry only a very limited stock of fabrics, if any. Table XXI illustrates the amount of stock carried in each type of store. The number of stores with very limited stock has the largest representation, 38 in number (or 19 percent) had stock amounting to \$500.00 or less. Most of these were independent small rural stores with only eight chain stores in this category. Of the 200 stores interviewed which carried piece goods 50 percent carried \$4000.00 or less in fabric stock and 42 percent were independent stores. This proportion of stores that have \$4000.00 or less and being independent stores seems to indicate that the independent store owner does not feel that the return on his limited capital is enough to increase his stock in the rural areas. It is noted that the specialty stores, all independent, had at least \$5000.00 worth of stock with over half of them having between \$7000.00 and \$20,000.00 worth. The largest percentage of chain department stores had stocks valued between \$3000.00 and \$15,000.00, indicating that chain stores are more willing to invest a larger amount

of their capital in piece goods. B. Sales value. In comparing sales value with stock values, it is again evident that the small independent stores have the sales bracket of \$1000.00 or less in sales. The chain stores in this category are the general merchandise stores which carry a limited amount of fabrics and the variety stores which generally stock only dress lengths and mill ends and do not emphasize their fabrics. The largest representation of chain stores lies in the sales value bracket of \$10,000.00 to \$30,000.00, with 22 percent of the chain store sales in this bracket. C. Turnover rate. The stock inventory turnover averages 2.9 according to figures given in interviews but the total stock value compared to total sales shows it to be higher than this figure. The estimated total stock value is \$1,383,435 and the total sales value is \$4,151,325. This indicates a rate of 3 while the graph plotting stock value to sales value (see Exhibit 5) shows a rate of almost 5. D. Population effect. In comparing population with total sales it is interesting to note the discrepancies. While Yellowstone county has the largest population its sales value was less than Cascade County. Other differences are due to the make up of the state geography. The state of Montana, fourth in the nation, covers an area of 147,138 square miles. It stretches 550 miles from the Idaho line to the North Dakota line and 325 miles from the Canadian border to the Wyoming border. If the state were divided into eastern and western Montana about one third the



### TOTAL SALES PLOTTED TO STOCK VALUE



area would be in the western part but with a population of 287,362 (or 42 percent) of the total for the state in 18 counties. While the number of persons per square mile for Montana is 4.6, it varies by county from .4 in Garfield County to 64.9 in Silver Bow County.<sup>5</sup> Of the total sales value (\$4,151,325), \$1,813,454 is found in western Montana (43 percent of total sales). In eastern Montana, four counties account for \$1,491,900 (or 63 percent) of the sales for the eastern part of the state. These four counties are: Cascade, Valley, Yellowstone and Custer; the first two are located on the High Line, the other two in the south central area on the Yellowstone River. Cities of 2500 or more controlled \$3,585,050 (or 86 percent) of the total sales as shown in Table XXIV but contained only 46 percent of the population. However, the population is more urban than rural as shown in Table XXV, dealing with population according to sex, age groups and urban or rural areas. This indicates that the urban shopping will continue to grow, while rural shopping in fabrics will remain constant or decline.

6. Consumer buying behavior. A. Buying groups. It was found that the largest group of persons buying fabrics were the young married women who were sewing for their children and themselves to economize. The next largest group were the teen-agers and in some counties the teens were the largest buyers. The reasons for teen buying are many: they want more clothes for the money they have available; they like to sew,

5. Montana Almanac 1959-1960. p. 1. Statistical Supplement. (Missoula, 1960) p. 22.

Table XXIII

Counties listed according to total fabric Sales Value

Order	No. Stores	County	Co. Population	Aver. turn O	Inv. Stock	Total Sales
1	12	Cascade	73,418	3.0	242,380	621,600
2	13	Yellowstone	79,016	3.5	203,500	606,500
3	9	Gallatin	26,045	2.9	95,050	344,050
4	9	Missoula	44,663	2.8	100,900	320,150
5	10	Flathead	32,965	3.2	74,108	281,908
6	4	Fergus	14,018	3.0	78,300	253,600
7	6	Silver Bow	46,454	4.3	56,500	217,600
8	7	Lewis & Clark	28,006	1.6	79,844	205,744
9	4	Park	13,168	3.1	65,000	173,000
10	6	Valley	17,080	2.8	38,825	141,300
11	5	Custer	13,227	3.0	37,000	122,500
12	6	Hill	18,653	2.8	24,400	75,300
13	6	Lake	13,104	2.9	23,548	66,048
14	4	Deer Lodge	18,640	3.1	13,200	55,900
15	5	Glacier	11,565	2.3	17,000	44,700
16	5	Roosevelt	11,731	2.7	14,800	44,600
17	2	Pondera	7,653	3.0	13,000	44,000
18	6	Ravalli	12,341	2.6	12,800	42,900
19	3	Richland	10,504	2.8	17,000	40,000
20	4	Dawson	12,314	2.0	19,500	39,000
21	5	Lincoln	12,537	2.7	22,300	38,350
22	3	Sheridan	6,458	4.8	10,407	35,050
23	4	Phillips	6,027	2.8	8,800	31,100
24	2	Fallon	3,997	3.0	10,700	30,750
25	2	Toole	7,904	3.6	8,700	29,700
26	4	Blaine	8,091	2.5	7,150	22,650
27	2	Rosebud	6,187	3.0	11,500	17,700
28	2	Teton	7,295	3.0	6,200	17,500
29	3	Beaverhead	7,194	2.8	4,500	17,000
30	3	Daniels	3,755	3.7	6,019	16,126
31	1	Wheatland	3,026	5.5	2,000	15,000
32	3	Mineral	3,037	2.7	4,600	13,200
33	3	Broadwater	2,804	2.6	4,500	13,000
34	3	McCone	3,321	3.0	6,300	12,500
35	4	Powell	7,002	2.8	4,375	12,200
36	2	Choteau	7,348	3.2	3,800	10,517
37	3	Big Horn	10,007	3.8	4,500	10,500
38	4	Sanders	6,880	1.5	6,004	10,004
39	1	Stillwater	5,526	2.5	3,500	8,750
40	3	Carbon	8,317	3.1	2,450	7,850
41	3	Mussellshell	4,888	3.0	2,450	7,000
42	2	Sweet Grass	3,290	3.3	2,000	6,500
43	2	Prairie	2,318	2.0	3,500	5,500
44	1	Meagher	2,616	2.5	2,000	5,000
45	1	Garfield	1,981	2.0	2,000	4,000
46	2	Carter	2,493	2.0	1,500	3,500

Table XXIII (continued)

Order	No. Stores	County	Co. Population	Aver. turn O	Inv. Stock	Total Sales
47	1	Judith Basin	3,085	3.0	1,000	3,000
48	1	Madison	5,211	2.0	1,000	2,000
49	2	Treasure	1,345	2.5	475	1,213
50	1	Liberty	2,624	3.0	400	1,200
51	1	Powder River	2,485	5.0	100	665
52	1	Petroleum	894	3.0	260	600
53	1	Wibaux	1,698	2.0	250	500
54	1	Jefferson	4,297	1.0	400	400
55	1	Golden Valley	1,203	2.0	200	400
56	0	Granite	3,014	0.0	000	000
				<u>3.1</u>		<u>4,151,325</u>

Table XXIV

## ESTIMATED total SALES IN CITIES OVER 2500

Cities	Population	Estimated total Sales
Great Falls	55,357	620,100
Billings	52,851	461,000
Butte	27,879	217,600
Missoula	27,090	320,150
Helena	20,227	205,500
Bozeman	13,361	335,000
Anaconda	12,054	55,900
Havre	10,740	72,500
Kalispell	10,151	236,900
Miles City	9,665	122,500
Livingston	8,229	173,000
Lewistown	7,408	253,600
Glendive	7,058	39,000
Glasgow	6,398	138,900
Deer Lodge	4,681	12,000
*Laurel	4,601	73,000
Sidney	4,564	40,000
Cut Bank	4,539	35,200
Shelby	4,017	29,700
Dillon	3,690	17,000
Wolf Point	3,585	29,000
Roundup	2,842	7,000
Libby	2,828	34,000
Hardin	2,789	10,500
Conrad	2,665	44,000
	<hr/> 309,269	<hr/> 3,583,050

\* Not a county seat

Table XXV  
Population

By age groups, area, urban and rural, and sex, Montana 1960

Age groups	State		Urban	
	Total	Female	Total	Female
all ages	674767	331527	338457	171563
10-14 yrs.	67081	33090	31670	15900
15-19	51216	25381	25356	13468
20-24	40023	20025	21735	11304
25-29	38853	19531	20036	10031
30-34	41694	20336	21097	10582
35-39	43047	21334	22328	11032
40-44	42761	21212	21665	10992
45-49	39776	19208	19576	9822
50-54	33797	16169	16839	8423
55-59	29097	14178	14853	7594
60-64	23288	11189	12013	6004
Total				
10-64 yrs.	450633	221653	227168	115152
	Rural non-farm		Rural farm	
all ages	230712	111524	105598	48442
10-14 yrs.	23667	11729	11744	5461
15-19	17339	8233	8521	3680
20-24	13646	6629	4642	2092
25-29	13590	6851	5227	2649
30-34	14243	6724	6354	3030
35-39	13670	6833	7049	3469
40-44	13949	6941	7147	3279
45-49	13075	6159	7125	3227
50-54	10949	5012	6009	2734
55-59	9148	4409	5096	2175
60-64	7473	3663	3802	1522
Total				
10-64 yrs.	150749	73183	72716	33318

Source: Montana Almanac Statistical Supplement Based on 1960 Census, p. 23.

having learned how in Home Economics classes in High School and in 4-H groups, where sewing projects give them a feeling of accomplishment; they can get clothes to fit them better and they can have their clothes just a little different from the crowd and still be in top style. A survey made by Seventeen magazine recently estimated that four out of every five of the nation's 11,065,000 teenage girls are sewing at home for themselves or their rooms. Nine out of 10 learned to sew either from their mother or at school.<sup>6</sup> It was found that older women who purchased fabrics were generally sewing for grandchildren or children rather than for themselves. B. Buying behavior. In buying fabrics the reason for choice was generally quality, with fashion very close and price last. It was found that people preferred to pay a little more for better quality. Fabric sales personnel felt this was due to education for better quality received in Home Economics classes, 4-H groups, Home Demonstration Clubs and others.

7. "Good will" between Home Economists and store owners and managers. Store owners and managers of fabric departments expressed appreciation for the business generated by Home Economics groups, such as teachers, 4-H groups and Home Demonstration Clubs, but demands of customers could be better satisfied, they stated, if owners and managers knew in time what these groups would be requesting. Stores do their big purchasing for winter goods such as wool in the summer dur-

6. Fabric and Trimming News Seventeen Survey Proves Great Sewing Activity among Teenagers. Vol. 4, No. 4. Oct. 1963. p. 2.

ing May and June, while spring goods are ordered in November thru January. Store buyers need to know well before selling season what he can expect the teacher to request her students to purchase. This situation could be remedied with better communication between the groups and the store managers. Twenty-five percent of managers felt their communication was excellent and in this group were men whose wives were Home Economists or where the Home Economists were home-town women who knew conditions in the towns and stores. About twenty-five percent of those interviewed seemed indifferent, but fifty percent were concerned that there was no communication between them. Store executives felt partly at fault for not contacting the Home Economists about what purchases in fabrics and notions they would need for the year's projects, but felt awkward in attempting to do so. They expressed a desire to have the Home Economists come to the store and talk over their plans for projects and state what materials would be needed so that the stores would be readied to accommodate their customers.

Those starting to stock wool or planning to regularly requested information on adult education in clothing construction, as many home sewers were reluctant to purchase the woolens without more instruction on how to use them.

Altho evidence is lacking, all store executives interviewed expressed resentment to having fabric orders go out-of-town "because their tax dollars helped support the schools



and teachers." This value judgment may be untrue, but is apparently a widely held opinion.

Summary. The survey of Montana stores selling fabrics, 200 of them, showed that all general merchandise, department, limited variety or specialty stores carried cotton fabrics, with rayon and acetate fabrics a close second. Wool and wool blends were carried by about half the stores surveyed, silk and linen by larger urban stores only. Most of the fabrics mentioned were carried on bolts which is the accepted method of display. Short length mill ends, skirt lengths and packaged goods were used also in many stores. Stores were independently owned, independents on a cooperative buying basis, or chain stores.

Window displays were the most usual way of advertising fabrics by all stores, while some also used newspaper advertising when 50 percent of the cost was defrayed by the manufacturing company because their brand name was featured.

The gentle population expansion and its redistribution away from the rural to the urban area have caused an increased business in towns of over 2,500 to 86% percent of the total sales of fabric in the state. The information concerning inventory stock shows that the small independent stores carry only a very limited stock of fabrics and are in the largest number carrying \$500 or less worth of fabrics. The sales turnover in fabrics for the entire all-store category averages about three turns, varying from one to five turns,

depending on the location. The buying of fabrics seems to depend on quality first at the right price due to an informed consumer who has received some education along Home Economic lines. Because of the fashion consciousness of the younger groups who buy fabrics, fashion plays a close second in influence, while actual price of fabric is not considered an important factor.

## Chapter V

### Summary and Conclusions

Fabrics in Montana have been an item of trade since the time of the explorers. It was a major item of trade with the Indians at Fort Owen in western Montana brought overland from Walla Walla and Salt Lake and in eastern Montana at Fort Benton and other trading posts, freighted up the Missouri River. Fabric trade was dependent on the Indians until gold discovery brought an influx of people to the gold fields of Virginia City, Bannock and Helena. Settlement of these areas caused general merchandise stores to flourish, supplying miners with goods. Other areas in Montana were being settled during the growth of the cattle and sheep industries. In 1875 retail businesses had grown to 292 among 50 towns. The principal cloth sold in stores of that period were calicos, mull, silk moire, satin and wool.

By the turn of the century, department stores had been established in some of the larger towns of the state and these stores together with the old country stores or general merchandise, were all independently owned. Eleven of them, all started before 1900, some as early as 1865 and 1867 are still in operation.

By 1918 Montana had 11,871 retail businesses. Fabrics of this war period were limited in color to navy and khaki because dye stuffs furnished by Germany had been cut off. By the end of the war the DuPont Co. had perfected dyes and

restored to the fabric business a wide range of colors.

Rayon fabrics which had been used for some time came into importance in 1927 with the development of crepe twist in the yarn extending the use of rayon to softer dress fabrics.

In the late twenties and early thirties the chain stores made their appearance in Montana. Penney's came in during this period and remains the largest chain organization in the state with 31 stores. The limited price variety also moved into the state at this time. The most prominent one is the Woolworth 5 and 10. These stores depend on cheap goods at a fast turnover for their success. Independently owned stores felt the competition from the chains and limited variety, but continued their policy of providing credit accounts and continued to advertise in the local papers.

Fabrics of the early twenties and thirties were silks, satins, velvet, georgette crepes, linen, rayon jersey and rayon faille. Wool challis and unfinished worsted were available. Cotton percales were big business where fabrics were sold.

By 1935 "the cutting up industry" or ready-to-wear was purchasing most of the rayon goods produced and so much of other fabrics also, that it was causing concern among piece goods retailers. This ready-to-wear industry increased in importance in the East but it was not until the war years that it replaced yard goods in importance in Montana. During World War II speculation on the market made yard goods

scarce and it was very difficult for stores to maintain their stock. Many small stores discontinued carrying fabrics for this reason.

While Montana merchants were unable to maintain their stock, the eastern mills were increasing production for the war effort. During the war times silks were unavailable. Experiments were being made with nylon and it was found useful and was being improved. Other synthetics were also being developed. Synthetic fibers are the main reason for inter fiber integration in the textile industry. These fibers have superior functional properties which make them desirable and they have replaced the use of the natural fibers in many instances.

Since the war there has been a renewed interest in home sewing in the nation. The industry sold approximately one billion yards of all types of fabrics in 1962 over the counter. This sale of fabrics has generated sales in sewing notions to the amount of \$350,000,000, in sewing machines to 1,000,000 annually and about 100,000,000 paper patterns. This renewed interest in sewing appeared in Montana because there was approximately \$4,151,325 worth of sales in fabrics for 1962. These fabrics include a large variety of cottons from percales to velveteens, rayons from crepe to velvet, both of which have a variety of finishes such as wash and wear and wrinkle resistance. Acetates are found in taffeta to brocades, synthetics in nylon, polyester fiber and acrylic fiber

fabrics in fleece, knits and woven dress fabrics. Wool comes in flannel, tweed, fleece and knits, as do the wool blends. Silk is not as widely used as earlier; it is generally found in raw silk, shantung and organza. Linen, if found, is only in the larger stores and is usually the imported Irish linen.

Types of fabric vary in quality from the best to mill ends used by smaller stores. Stores carrying fabrics had stock, valued from a low of \$50 to the high of \$150,000. The total estimated stock for Montana was \$1,383,435. Changes in color and texture in fabrics by season forces fashion obsolescence on fabrics held over the season. Most of the larger stores cope with this problem very well; smaller rural stores do not stock fashion fabrics but rather carry only a staple line of fabrics, thus avoiding the problem.

In the cities of 2,500 or more in Montana, department stores are the most numerous of the four categories of stores. Most of these towns have chain department stores and limited variety stores, the chains in the larger cities. Since about 1955 specialty fabric stores have appeared, mostly in the largest towns, apparently filling a need for greater interest and emphasis on fabrics for the awakened interest in home sewing. With a shift of population to urban centers and the population growth in Montana, suburban areas have developed and along with them large shopping centers have grown at the outskirts of towns. Better roads, better and more cars and parking areas for shoppers have made these markets active.

Fabrics are sold in a new type of general merchandise store, the supermarket, as a non-food merchandise item. Of the 56 county seats in Montana 24 had a population of 2,500 or over, 32 less than 2,500. Of this group nine had less than 1,000, ranging from 194 to 766; fifteen were 1,000 up to 2,000 and eight were 2,000 to 3,000. Eleven towns ranged from 3,585 to 9,665; 4 from 10,000 to 13,361; 3 in the 20,000's and 2 metropolitan areas, 52 and 55 thousand respectfully.

Independent general merchandise stores remain almost solely in the small towns of Montana. They carry all the community needs including a small stock of fabrics. If the town supports a separate grocery store then usually a small department store supplies the fabrics. Most of these stores carry cottons only; rayon and acetate appear in the larger of these towns. If the home sewer is demanding in her requirements or taste she must go to the urban centers or "send away" for her sewing needs.

So far as the author of this thesis has been able to ascertain, no other such survey of the retail fabric business has been made in Montana or other states. Thus there is no basis for comparison. However, it would seem that a retail business amounting to \$4,151,325 in value obviously produces some socially desirable effects in the economy of the state.

APPENDIX I  
THE PICTURE OF RETAIL FABRIC BUSINESS IN MONTANA  
SUMMER OF 1963  
AS DEVELOPED FROM SURVEY OF STORES IN COUNTY SEATS  
AND A FEW OTHER TOWNS ON HIGHWAY.

Montana has 56 counties and usually the county seats are the most representative towns. In the survey made, summer of 1963, 48 of the 56 county seats were visited; eight of them were surveyed by questionnaire.

The county seat with the largest population was Great Falls with 55,357. It had eleven stores selling fabrics. Billings was the other county seat considered a metropolitan area, with population of 52,851, also with eleven stores dealing in fabrics. Two county seats possessed no stores selling fabrics, Virginia City in Madison county with a population of 194 and Philipsburg in Granite County with population of 1,107. Altogether in the 56 county seats there were 165 stores dealing in fabrics. Twenty-eight other towns were visited and 35 stores interviewed. This information is in Table XVI.

Stores selling fabrics were in four categories: general merchandise, department, limited variety and specialty stores. The types, number of each in county seats and in other towns are found in Table XIV. Stores are also categorized by independents, chains and independents using cooperative buying organizations. Noteworthy is the fact that all



specialty fabric stores were independently owned, twelve in number in 1963. The significance of this is that independent owners are more willing to gamble with a new idea; chains are more reluctant; usually a community must be prospering before a chain will enter and when it begins to decline, they pull out.

In Montana there are 21 different chain organizations represented, nine of them with one store each. (See Table XIX). There were 94 chain stores, all in county seats except four of them. There were 71 independent stores in county seats and 31 in other towns. Independents outnumbered chains by 102 to 98.

Cotton goods were sold in every store carrying fabrics. Stores carrying the smallest amount carried the packaged cottons, the Dan Rivers or the Mission Valley cottons which were gingham, wash and wear and wrinkle shed. Some department stores and specialty stores carried a large assortment of cottons, such as listed in Table X with prices. Prices ranged from a low of twenty-five cents a yard to a high of \$3.19 a yard.

Acetates were carried in 149 stores and rayon in 147. Linen was the least stocked fabric, in only 25 stores. Most expensive fabrics found was cashmere wool at \$25.00 a yard.

Total inventory stock in 200 stores was estimated to be \$1,383,435. Total sales were estimated to be \$4,151,325.

The largest number of stores, 38 of the 200, had an inventory stock of \$500 or less. The highest valued stock was \$150,000 and it was in a specialty store.

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