

Session 53: **Cultural/ Cross-Cultural Advertising and Promotion: the Nexus of Media, Culture and Economics**

**Advertising Strategies in the Interwar British Printed Textile Industry**

By Dr Emily Baines, De Montfort University, Leicester, UK

**Introduction**

This paper will examine the advertising of British printed textile firms to the home market in 1919-40. It will compare the sectoral differences to consumer and trade market communication strategy of the dress and furnishing print sectors. The intention is to analyse the impact on marketing communication strategy of differences in product type and type of industrial competitive dynamic. In this period, the dress fabric sector was an increasingly Schumpeterian, high turnover, growth industry type, while the furnishing textile print sector functioned as a mature, traditional industry type, producing durable shopping goods.<sup>1</sup> Changes in their promotion strategy in response to economic and social changes in the environment by these sectors will be considered.

The advertising strategies of a number of case study firms will be discussed in more depth and their response to the pressures of an unstable and challenging economic context and to changes in the social trends of an established market examined. Four case study companies are analysed, two furnishing textile (Turnbull & Stockdale Ltd. and Morton Sundour Fabrics Ltd.) and two dress fabric (Ferguson Bros. Ltd. and the Calico Printers' Association). A summary of economic conditions in the British printed textiles industry in the interwar period is given, with analysis of printed calico and artificial silk production and home market consumption trends. The effectiveness of their marketing communications strategy indicated by a context of the sales results.

This paper will link marketing strategy and industry analysis theory with material culture theory, including semiotic analysis of advertising images. The consumption process activated by the advertising to consumers is linked to buyer behaviour for different product types.

Companies often use a combination of push promotional strategies through trade/business-to-business distribution channels and pull strategies of marketing direct to the consumer to encourage demand. Personal selling, trade promotion offers and trade shows are dominant parts of the marketing mix for B2B push strategies<sup>2</sup>, but advertising in trade periodicals is also used to a varying degree. Coviello, N. & Brodie, R. examine the difference between B2B and consumer advertising and concludes that although there is a greater emphasis on relationship marketing (building strong relationships with business customers and those in the value chain) than transaction marketing (encouraging individual sales), there is no fundamental

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<sup>1</sup> Schumpeter, J.A. (1934) *The Theory of Economic Development*, Harvard University Press; Porter, M. (1980) *Competitive Strategy: Techniques for Analysing Industries and Competitors*, Free Press; Grant, R. (2005) *Contemporary Strategy Analysis*, Blackwell Publishing.

<sup>2</sup> Clow, K. (2004) *Integrated advertising, promotion, & marketing communications*, Pearson.

difference in the approach taken.<sup>3</sup> A cognitive approach emphasising factual product benefits and features is common in contemporary trade journal advertising, but affective methods using emotive imagery to communicate core brand benefits or brand personality are also used.

The consumption process is described as a 'labour of appropriation' Bourdieu<sup>4</sup>; this is developed as a theory by Michel de Certeau, who argues that consumption is a process of 'making' through particular ways of using products and making sense of them.<sup>5</sup> This was a very direct labour for dress fabric consumers in the interwar period, who would have undertaken the process of transformation of the fabric into clothing. They would therefore appropriate the fabric as they transform it into dress, producing something that is very much part of their own constructed sense of identity, due both to the function of dress as self-presentation and to the craft process of personal engagement in the making.<sup>6</sup> The sublation process of personal identification with a product<sup>7</sup> is therefore particularly strong in home dressmaking and the consumption process for dress textiles. An imaginative recontextualisation of the dress fabric into clothing is undertaken by the consumer before a purchase takes place. For furnishing textiles, an imaginative contextualisation of the fabric into the consumer's home is required, but the product does not need to be significantly transformed to achieve this – there is less of an imaginative leap required.

### **Economic condition of the printed cotton industry**

The first world war had a severe effect on the British textile industry, allowing displacement of exports by competitors overseas. This position was further eroded by the emergence of Japan as a competitive threat (for example, the East African market was cut by 50% in 1925-6 due to severe price cutting from the Japanese<sup>8</sup>) and increasing import protection in key markets such as India and Egypt. Printed cotton production fell 38.7% from 1305 million linear yards in 1912 to 800 in 1924<sup>9</sup> with an overall drop due to continuing loss of exports of 51.8% from 1913 to 1929 (if measured in standard pieces of 30 yards: 24,522,565 in 1913; 11,809,993 in 1929<sup>10</sup>). In the more detailed export figures available, the overall contraction of the industry is clear: total printed goods exports fell by 66.4% from 1,230.8 million square yards in 1913 to 413 million in 1937.<sup>11</sup>

Production data available is limited, since national totals were principally collected in irregular Censuses of Production. However, the concern evinced by the textile

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<sup>3</sup> Coviello, N. & Brodie, R. (2001) 'Contemporary marketing practices of consumer and business-to business firms: how different are they?', *Journal of Business and Industrial Marketing*, Vol. 16, No. 5, pp382-400.

<sup>4</sup> Bourdieu, P. (1984) *Distinction: A Social Critique of the Judgement of Taste*, Routledge, p100.

<sup>5</sup> Certeau, M. de (1984) *The Practice of Everyday Life*, University of California Press, ppixiii-iv.

<sup>6</sup> De la Haye, A. (1999) *Defining Dress: Dress as Object, Meaning and Identity*, Manchester University Press.

<sup>7</sup> Miller, D. (1987) *Material Culture and Mass Consumption*, Blackwell.

<sup>8</sup> Robertson, A. 'Lancashire and the Rise of Japan, 1910-1937', in Rose, M. (ed.) (1991) *International Competition and Strategic Response in the Textile Industries Since 1870*, Cass, p93.

<sup>9</sup> Board of Trade archive: Public Record Office, BT 64/14/1872/36.

<sup>10</sup> BT 55/ 18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30, C.21

<sup>11</sup> BT 70/ 28/ s1322/ 30: Fiscal Blue Book.

industry and Government led to the establishment of industrial organisations for the compilation of statistical data on the industry, including the Joint Committee of Cotton Trade Organisations (JCCTO) and Cotton Trade Statistics Bureau. Their data can be used to supplement the official statistics (see Figure 1).<sup>12</sup> Production figures for the immediate post-war period are not available, so effects of the 1921 coal strike (a coal strike from April to July 1921 stopped production in most of the textile industry) and the sudden cease in demand following the price crash are included in the war period. The 1926 coal strike had a more limited effect on production in the printed textile industry: demand fell but reduced levels of production continued, fuelled by expensive foreign coal. There is a smaller improvement in production during the 1930s, from the low point of the Depression in 1930.

Table 1

Year	No. of million linear yards printed	Value in £ million	No. of million square yards printed
1912	1305	5.1	
1924	800	9.5	834
1930	611	6.437	603
1933	623	5.354 (at 1930 average values: 6.864)	639
1934	608	5.164 (at 1930 average values: 6.757)	629
1935			659

No differentiation is given in these total figures between furnishing and dress fabrics.

Production of rayon piece goods, in sharp contrast with cotton piece goods, expanded dramatically during the interwar period, especially from the later 1920s. British production of rayon and rayon mix piece goods is given in Table 2<sup>13</sup>:

Table 2

	1912	1924	1930	1933	1934	1935
Volume printed (m. sq. yds.)	-	-	-	-	-	78
Volume of total finished goods (m. sq. yds.)	-	49.1	181.1	284.9	341.8	359.9

<sup>12</sup> Linear yards and value figures from Board of Trade archive, PRO BT 64/14/1872/36; square yards figures and 1930-34 value figures and 1930 equivalents from Joint Committee of Cotton Trades Organisations (1939) *Cotton Trade Statistics*, p69, Table 98D.

<sup>13</sup> Joint Committee of Cotton Trades Organisations (1939) *Cotton Trade Statistics*, Table 98D, p69: Manchester Library 338.476772 JO4.

Value of total finished goods (£000)	45	971	2387	3189	3853	3924
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The industry was established when Courtaulds bought the British rights to the viscose process in 1904 and started mass-production of rayon. In 1920 British Celanese Ltd. began to produce cellulose acetate yarns, forming 'celanese' fabric. A number of smaller rayon producing companies were also formed, rising to about 30 in 1929 and falling to 11 in 1939.<sup>14</sup> Ferguson Bros. Ltd. produced artificial silk textiles from 1921, when 3,589 pieces were sold.<sup>15</sup> By 1928, the total sold was 132,937 pieces. With this steep upward curve in production volume during the 1920s, there was also a substantial increase in quality and fall in price. In the early post-war years (1919-20), 'artificial silk was obtainable in the familiar stockinette weave – very shiny, very apt to 'ladder' or wear, and very restricted in colour and design . . . the best quality artificial silk stockinette for dresses was somewhere about 25/9 a yard, in a few shades of grey, navy, brown and black.'<sup>16</sup> By 1931, you could buy 'satin beauté in glorious shades – soft, silky and supple – for 3/11 per yard.' Its advantages were further described: 'Artificial silk, which now is so exactly like real silk, which washes and wears in many cases better than real silk and is sold at extraordinary low cost, has leapt into popularity. . . Crepe de Chine has been most difficult to copy in artificial silk but some of the new season's rolls selling at 3/11 per yard look exactly like a heavyweight real silk costing about 12/11.'<sup>17</sup> The development of rayon substituted for cotton as a standard dress textile, with new mixed and artificial fibre textiles becoming a cheap mass-market option and cotton becoming a quality market fabric.<sup>18</sup> This is seen in relative pricing as well as fashionable perception of cotton: 'Cottons have attained sophistication for evening and are no longer the exclusive privilege of the very young. One of the newest to be used in this way is printed voile.'<sup>19</sup>

### Home Market Calico Print Sales

The home market for printed textiles was far more stable and positive, in comparison with the extreme fluctuations and contractions of export sales. No complete data series for the interwar period is available for British home trade textile print consumption. Company minutes indicate that the post-war recovery occurred in 1920, but that demand from wholesale houses dropped with the 1921 crash, continued low in 1922 but recovered in 1925.<sup>20</sup> Annual data from 1933-8 is given by Geoffrey Turnbull, based on Federation of Calico Printers reports, with a rough impression of the 1927-32 period noted.<sup>21</sup>

Table 3

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<sup>14</sup> Harrop, J. 'Rayon' in Buxton, N.K. & Aldcroft, D.H. (1979) *British Industry between the Wars: Instability and Industrial Development, 1919-1939*, Scolar Press, p290.

<sup>15</sup> DB 110/ 63 1870-1928 Analysis of sales by fabric and country.

<sup>16</sup> Budden, B. (1931) 'The Romance of Artificial Silk', *Coming Fashions*, February, pp20-21.

<sup>17</sup> Ibid.

<sup>18</sup> Porter, M. (1985) *Competitive Advantage: Creating and Maintaining Superior Performance*, Free Press, p5.

<sup>19</sup> 'Town Silks . . . Country Cottons . . . Cottons for Evening . . . Printed Chiffons' (1931) *Vogue*, April-May, pp8-9.

<sup>20</sup> UGD 13/ 5/ 6 United Turkey Red Co. Ltd. minute book, 1920-30.

<sup>21</sup> Turnbull, G. (1951) *A History of the Calico Printing Industry of Great Britain*, J. Sherratt & Son, p370.

	<b>Home Trade Print Total</b>
1927-32	Varied between 210 and 225 million yards; 1928 was a 'print' year.
1933	281 million yards
1934	266 million yards
1935	226 million yards
1936	220 million yards
1937	242 million yards; 'print' year
1938	228 million yards

Very strong sales in 1933 and 1934 were followed by a comparative fall in 1935-6 back to previous levels, with a good year also in 1937. The high market demand for 1933 and 1934 was due to greater competition and falling prices from the merchants and producers who usually sold to the export trade. In 1935 the continuing export situation further 'concentrated trade in the home market, for which there has been serious overproduction'<sup>22</sup>, and prices dropped further. Consumption dropped back to a lower level in 1935-6, possibly due to a greater fashionability of weave rather than print in these years noted by Geoffrey Turnbull and Alastair Morton,<sup>23</sup> which reversed in 1937.

The social implications of the interwar macroeconomic changes varied depending on market segment. After the 1929 crash, the loss of income from stock market investment had a severe impact on the upper and upper middle class, with a subsequent reduction of the market for high quality furnishing textiles. For those in work and primarily dependant on earned income, prosperity increased as the drop in price of food and other goods released greater disposable income. The lower priced home market was thus fairly healthy in demand but highly price competitive. These variations can be seen in the women's magazines of the period: the 1931 *Vogue* was dominated by articles for those with 'limited income' including a regular section of such articles at the back (clearly not people used to a very limited income, as it included hints for adapting last year's fur coat into a hat and muff), while *Coming Fashions* had articles in the 1931 Christmas number on 'Luxurious but not expensive' and 'Variety at little cost' dresses and some comments on falling prices but generally had little focus on economy. In August 1931 Trevor Fenwick (of Fenwick Ltd, New Bond Street) commented in *The Draper's Record* that:

'numbers of quite well-to-do women nowadays are definitely not prepared to pay a high price for a gown or suit. Women are style-snobbish; they are not

<sup>22</sup> Report to Shareholders by Whitworth & Mitchell Ltd. on 7th September 1935, quoted in *ibid.*, p371.

<sup>23</sup> *Ibid.*, p370; GD 325/ 164/ 10 Morton, A. *Character of Present Day Design*, referring to 'the first stage' in the emergence of 'the contemporary style of design'.

price-snobbish. They insist on being in the fashion but will not pay high prices.’<sup>24</sup>

In May 1933, the impact of this situation for the furnishing textile sector was commented on in the trade press:

‘In striving to maintain its turnover the furnishing soft goods department has been severely handicapped of late, for widespread unemployment and trade conditions generally have brought about a reduction in purchasing power; and as if that were not in itself sufficient, there has been a sharp drop in prices, so that an increase in the number sold is by no means a guarantee of bigger turnover or better profit.’<sup>25</sup>

There were also substantial variations in economic conditions in different geographic regions – the northern and western heavy industry areas suffered severe unemployment, rural areas were poorer due to the depression of the agricultural economy, while the new light industries and service sectors were expanding rapidly. These aspects were noted in the trade press: in March 1931 *The Draper’s Record*, following the British Industries Fair, there was a comment that ‘There has been a fair amount of business offering in home trade fabrics and fancies have been in steady request. The tightness of money in the North of England, however, is still acute.’<sup>26</sup>

### **Structure of the Printed Textile Industry**

The textile printing industry was dominated by the Calico Printers’ Association (CPA), with approximately 50 additional medium sized companies active in the interwar period and at least 20 smaller companies, though fluctuations in the number of businesses trading and unclear references indicate a further 50-60 companies that may be textile printers. A database of calico printing companies compiled during this research gives a total of 123 companies active during 1919-40.<sup>27</sup> This total does not include silk, linen or velvet printers, small workshops or subsidiaries where the main company is included. It may include some converter companies (merchants or manufacturers that commissioned printers) - those listed as calico printers and merchants, such as K. Funduklian<sup>28</sup> are most likely to come into this category - but 68 of the companies are corroborated sufficiently for confidence. However, the majority of these would be commission-processing companies, dependant on orders from export merchants, shipping agents, manufacturers or wholesalers. These would not actively market their goods to consumers. Print companies competed for export orders from an office in Manchester, wherever their works production was based (95 such

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<sup>24</sup> ‘The Modern Woman is Style Snobbish but not Price Snobbish’ (1931) *The Draper’s Record*, 8/8/31, p25.

<sup>25</sup> ‘The Furnishing Soft Goods Department: Modern Tendencies in Departmental Activity’ (1933) *The Cabinet Maker and Complete House Furnisher*, 13/5/33, pp222-223.

<sup>26</sup> ‘Fair Demand for Cotton Printed Goods’ (1931) *The Draper’s Record*, 7/3/31, p17.

<sup>27</sup> Database sources were: January samples of the Register of Designs; the Manchester and other trade directories; the December 1935 list given in Turnbull, G. op. cit., Appendix 3, and other references. It may be an understatement of the total, since commission-processing print companies will not have registered designs under their names: the designs will have been registered under the name of the merchant or manufacturer. Some of these companies closed down early in the inter-war period while others only sent in designs for a short period in the samples taken, so it is unclear how many continued to operate during this time.

<sup>28</sup> K. Funduklian gave trial orders to the United Turkey Red Co. Ltd. in 1935 for flannelettes, winceyettes and indigo printing.

firms are listed in the 1932 Kelly's Directory of Manchester). This gave them access to shipping agents and the Manchester Royal Exchange, and to the trade information and political representation of the Manchester Chamber of Commerce. The role of a significant proportion of printing companies was far more active, as entrepreneurial businesses that designed, developed and marketed their own products. This was stated in 1924, in a letter from the FCP to the Board of Trade:

'You are correct in your surmise that the great bulk of calico printing is still done on commission, but there is a fair amount done on cloth which is the property of the printer, who himself acts virtually as a merchant in regard to that part of his business.'<sup>29</sup>

The printed dress fabric sector was different in structural characteristics to the furnishing print sector, being a Schumpeterian, high turnover, competitive, highly fashion-based and increasingly technologically innovation-based industry.<sup>30</sup> It became increasingly low price, high turnover, product-innovation focused during the period, built on competition between large firms with science-based endogenous technical competencies.<sup>31</sup> For example, Ferguson Bros. Ltd. produced greater volumes of new designs and new fabrics produced per year: from 502 fabric ranges in 1931, rising to 762 in 1939 (of these 572 were new fabrics and variations of finishes in 1939).<sup>32</sup> These ranges were each available in large numbers of new pattern designs. This change in the nature of the competitiveness dynamics occurs with the development of artificial silk and its integration within the dress fabric industry. This had implications for the promotion requirements – it was necessary for new products to be brought to the attention of buyers and consumers more frequently and therefore more informative and brand awareness type advertising is required. Promotion is also focused on product brand rather than corporate brand, due to the wide variety of fabric types, ranges and designs produced by dress fabric companies. In addition, as a fabric product brand includes a wide range of designs, use of broader signifiers of brand connotations is common. An increase in fashion-consciousness and reduction in durability in the dress industry was noted in 1931: 'Any retailer who in these times advertised that his dress goods were so good that they would last for years would be taking the quickest and surest road to the bankruptcy court'.<sup>33</sup> The home market dress industry became an increasingly high turnover, low price industry, with less focus on a specific market segment and more tendency to a mass-market product; therefore there is likely to be a similar advertising strategy used for all consumers.<sup>34</sup>

The short product life-cycle in a Schumpeterian industry is a more risky environment: there is more investment in product development, less time for product adoption and familiarisation among customers and therefore more financial risk if the new product is not adopted quickly.<sup>35</sup> This meant that a drop in sales was more serious for return

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<sup>29</sup> BT 70/ 4/s2008/ 24.

<sup>30</sup> Grant, R. op. cit.; Porter, M. op. cit.

<sup>31</sup> Tidd, J. et al (2001) *Managing Innovation*, Wiley; Prahalad, C.K. & Hamel, G. (1990) 'The core competencies of the corporation', *Harvard Business Review*, May-June, pp79-91.

<sup>32</sup> DB 110/ 63 Ferguson Bros. Analysis of sales, 1870-1928: lists of fabrics from 1931-40, back of ledger.

<sup>33</sup> 'Fashion Dictates Fabric Trend: Style Before Durability – Factors that Influence Dress' (1931) *The Drapers' Record*, 10/1/31, p13.

<sup>34</sup> Porter, M. (1985) *Competitive Advantage: Creating and Maintaining Superior Performance*, Free Press.

<sup>35</sup> Porter, M. (1980), op. cit.

on investment, meaning that in periods of economic downturn, heavy expenditure on trade and consumer advertising in the dress sector is likely. As this is an industry in which technical product innovation was combined with style/ design innovation, fashion trends and fads relating to pattern and colour design and fabric qualities multiply the uncertainty of the technical product adoption process. Dress fabric companies attempted to overcome this fashion risk factor<sup>36</sup> by providing wide choice – a multiplicity of options in fabric type, pattern and colourway to cater for different fashion trends and the preferences of individual consumers. They also paid close attention to trend forecasting and fashion leads from Paris and the media. Strong direction for the season's fashions was given in Paris fashion shows, analysed by companies such as J. Claude Frères et Co. Paris who produced sample books showing trends in fabrics and colours for companies. Definitive statements of current fashions were also given by fashion magazines (e.g. 'Reds and greens are invading town. None of the gentle crimson shades; it's the yellow-reds: geranium red, tomato-red, Guards-officer red, lobster-red'<sup>37</sup>) and summaries of current trends by trade journals ('Plaids are much talked about . . . many of these new plaids are indistinct and not very large'<sup>38</sup>). The advertising therefore gives strong cues of fashionability, with reference to current styles (many of the 1931 advertisements show plaids, checks and indistinct tweed designs, for example) and text indicating a close connection to Parisian fashion sources.

The printed furnishing textile industry, however, was a mature industry, of a traditional competitive type with established firms and markets. It produced more expensive products that were bought less frequently and were less affected by sudden fashion change or technical innovation (classic styles are used, that will remain acceptable for long periods<sup>39</sup>, with an emphasis on quality and skill in production process – hand print processes and designs using many blocks or rollers are common). As an established industry selling a smaller range of products, marketing is focused on corporate brands, not product brands. The type of marketing required for such a mature industry type tends to be more B2B communication, with regular visits by established networks of sales travellers and little use of advertising. The advertising used focuses on known corporate brand characteristics, reminding known consumer segments of brand qualities. As a more durable, expensive, 'shopping' product, longer time is spent on the product search/ evaluation of alternatives process<sup>40</sup> and thus more focus on the actual product – so advertisements may show specific textile prints rather than broader signifiers of the product brand benefits. It is also likely that as more expensive, lower turnover product, there will be more focus on particular market segments in price or style preference.

As an established industry, however, it would be more threatened by sudden change in its environment, whether economic (macroeconomic changes, resulting in loss of spending power/ disposable income by market segment) or by the intervention of a significant product/ style change. This may mean that it responds by increasing the use of advertising during these periods of uncertainty. Significant changes in product

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<sup>36</sup> Easey, M. (2002) *Fashion Marketing*, Blackwell Publishing.

<sup>37</sup> 'Form and Colour in the New Mode' (1931) *Vogue*, 4/3/31, p39.

<sup>38</sup> 'Novelty in Spring Fabrics' (1931) *The Drapers' Record*, 14/3/31, p48.

<sup>39</sup> Easey, M. op. cit.

<sup>40</sup> Masterton, R. & Pickton, D. (eds.) (2004) *Marketing: an Introduction*, McGraw-Hill Education.

offering are likely in such a climate, especially reductions in price and changes in style to reflect the consumer taste changes.<sup>41</sup> There may also be increased observation of consumption trends from purchasing behaviour and attention to trend prediction by the trade journals. This aspect is seen in the intensive comment on design trends in 1919-23 in *The Cabinet Maker and Complete House Furnisher*, when the new 'Jazz' style prints became dominant.

### **Industry promotion practices**

The bulk of the printed textile industry focused on B2B marketing, with personal selling by representatives to customers within the value structure<sup>42</sup>, promotion at trade fairs and limited advertising. The main fair was the annual British Industry Fairs (BIF), which acted as a key marketing event for the textile industry. They were regularly attended by a wide range of manufacturing and print companies, whose goods were also listed in the BIF catalogue. The advertising was directed at the buyers of wholesalers, merchants and retailers, often as reminders of fabric brands or broader product ranges or to highlight their product displays at trade fairs. A switch from this emphasis to marketing direct to consumers was advocated in 1930 in *Textile Trader*, due to the passive position in which it left the manufacturer (or printer):

'Manufacturers have in the past relied too much for their business upon the demands of a few merchants. When times are good there is no fault to find with this idea, but when the business from these few firms suddenly falls and the demand ceases to exist, automatically the mill feels the effect immediately. There has been a serious lack of publicity given by makers to their cotton products and the styles which they are specially cut out to make.'<sup>43</sup>

### **Dress Fabric Print: Promotion to Consumers**

There are very few advertisements to consumers by printed dress fabric companies – only those that were also manufacturers, such as Ferguson Bros. – but some dyeing companies also advertised, often highlighting fast dyed fabric brands (e.g. 'Solprufe' by the BDA). Retailers advertised dress textiles to promote sales in January and February (Dickins & Jones, Harvey Nichols, Galeries Lafayette) and occasionally at other times (McDonalds Ltd. of Glasgow in April/ May issue 1931 *Vogue*; Gardiner's of Selkirk in February 21<sup>st</sup> issue 1934 *Vogue*). However, the main dress textile advertising was by manufacturers of new artificial silk fabrics, with especially heavy investment by Courtaulds, Wm. Hollins & Co. and British Celenese Ltd., and fewer appearances by Tootal Broadhurst Lee Co. Ltd., Ferguson Bros. and others. The intensity of investment is seen in British Celenese Ltd. taking a coloured back cover advertisement for every issue of *Fashions For All* in 1928, while Courtaulds would advertise several times in a single magazine, promoting different branded fabrics. For example, in January 1928 *Coming Fashions*, they had separate half-page adverts for 'Luvisca', 'Delysia' and 'Xantha' fabrics, while in April 1928 there were adverts for 'San-Toy', 'Japshan', 'Mylesta' and 'Delysia'. In these manufacturer's advertisements, there is an emphasis on the branded fabric – 'Visylka' and 'Viyella' by Wm. Hollins & Co., 'Rigasil' by Richard Goodair Ltd., 'Thierline' by Potter, Boardman & Co. Ltd., 'Tricoline' by Wemco and 'Silrexa' by Leigh Mills Co. The qualities of the fabrics are explained in lengthy passages of poetic textual description.

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<sup>41</sup> Easey, M. op. cit.

<sup>42</sup> Porter, M. op. cit., pp133-150; Kotler, P. et al (2000) *Principles of Marketing*, Prentice Hall, p85.

<sup>43</sup> 'Marketing' editorial (1930) *Textile Trader*, 4/8/30, p1.

This strategy of frequent reminder advertising of branded fabrics by the big manufacturers was discussed in *Textile Trader*:

‘If his goods are branded and already well known to the public, he is wise enough to keep that name constantly in the eye and mind of his public by extensive advertising either in newspapers, specialised trade journals, magazines, on posters or by means of attractive showcards in the stores. This ensures his name, and the name of his goods together with any qualification, being brought continually to the notice of existing and prospective customers. . The case of the smaller manufacturer is different only by reason of the fact that in many cases he lacks the initial capital necessary for advertising his goods, and he has to rely entirely on the reputation he has built up with a few clients, and the efforts of his travellers or representatives.’<sup>44</sup>

The brand identity is further reinforced by a note in almost all the advertisements that the brand name is printed on the selvedge and a call to customers to request the fabric by name. Some highlight this as the main message of the advertisement: a Wemes advertisement in February 1931 has an illustration of two ladies at tea, with one saying ‘I always insist upon Tricoline’, while a more imaginative series of ads by Tootal Broadhurst Lee Co. Ltd. in 1921 has lively drawings of children to communicate this theme (e.g. in November, ‘Security’ is illustrated by gleeful children behind a gate, safe from a group of hissing geese, to highlight the text beneath: ‘The name on the selvedge is your security when you buy Tootal Cloth. See that name on every yard, as Tootal’s guarantee to you of absolute satisfaction in wear.’). This is a classic ‘pull strategy’, attempting to use consumer demand to pull the product through the distribution chain. In addition, it was common practice in the advertisements to state that a booklet could be sent free to customers and often the patterns of the clothing shown in the publicity, as well as lists of drapers stocking their products.

There appears to be limited segmentation in the dress fabric print industry, with examples of identical advertisements being printed in a range of women’s magazines positioned to different markets. For example, Tobalcro by Tootals has the same series of advertisements in *Vogue* and *Coming Fashions* in 1931; and Courtaulds branded textile advertisements appear in a wide range of women’s magazines.

In dress fabric advertising of this period, it is customary to show images of a fashionably dressed consumer, often with the dress pattern available free, rather than illustrations of the fabric itself. The advertising mobilises a sublation process<sup>45</sup> in which the customer identifies with the image portrayed and takes on a partisan, proprietorial attitude to the product. The image shown may be a fairly minimal sketch, standing as a signifier for connotations of fashion and elegance<sup>46</sup>, without defining it by an association with a specific textile pattern among the thousands that may be sold by the company. An example of this is Courtauld’s advertisements, such as the ‘San-Toy’ and ‘Courgette’ half-page advertisements appearing in 1931 (January, *Coming Fashions*).

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<sup>44</sup> Ibid.

<sup>45</sup> Miller, D. op. cit.

<sup>46</sup> Barthes, R. (1977) *Image, Music, Text*, Fontana Press; Barnard, M. (1996) *Fashion as Communication*, Routledge.

### **Dress Fabric Print: Promotion to Trade**

Advertisements of dress prints to the trade are fairly frequent, but not as intensive as in the consumer advertising by artificial silk manufacturers. They are mainly by print companies, rather than fabric manufacturers and emphasise print designs rather than technical innovation in the textile. Large advertisements are mainly taken by the companies selling cheap, cost-leader fabrics that need to generate high turnover: the 'Martialine' advertisement by D. Marshall & Co. Ltd. in January 1931 *The Drapers' Record* fills the page with its new low price (2/11  $\frac{1}{2}$ d per yard retail), while Bevis Prints quotes 1/0  $\frac{3}{4}$  voile and 10  $\frac{3}{4}$  mock voile. Kenyon voiles and Ferguson Bros. both show examples of fabrics and frocks appropriate to different times of day (afternoon, evening and night) in *The Drapers' Record* in 1931, with a large fabric sample associated with smaller fashion figures (Kenyon one quarter page, Ferguson four full pages, all in black and white). Dress trade advertisements focus less on the fashion figure – it is there primarily to allow the buyer to visualise the usage type of the fabric, to contextualise the style or type of clothing to which the textile is most relevant – whereas in consumer advertising, the dress pattern is clearly defined with free patterns that can be sent for and the fabric is described in broad terms.

There is a difference in the design of trade and consumer dress print advertisements. More emphasis is given to showing examples of actual fabrics, less on broad product brand awareness. Several fabrics rather than a single one are usually shown in a dress advertisement (e.g. Dorcas Fabrics by J. & N. Philips & Co. in February 1931 *The Drapers' Record* has eight fabric samples shown, around a photograph rather than an iconic symbol of the 'Dorcas' brand personality figure). Illustrations of fashion models are drawn larger than in consumer advertisements and with more detail in the textile print design shown – so the figures become denotative of particular textiles rather than generically connotative of brand benefits such as elegance. In the Bevis Prints advertisement in February 1931 *The Drapers' Record*, the four textiles shown on figures are denoting the 'Entirely New Range Now Ready' stated in the title and each is given a price. A full-page 'San-Toy' advertisement in June 1931 *The Drapers' Record* has a large model figure illustration against a ground of two textile samples, with a sample book open at the design shown on the figure.

### **Case Studies: Dress Fabric Print**

**Ferguson Bros. Ltd.** was a vertically integrated dress fabric manufacturer, including production of artificial silk fibres, to spinning and weaving a variety of fabrics, and the final stages of bleaching, dyeing, printing and finishing. They took a marketing-focused approach, with very heavy investment in promotion, and especially advertising. They focused on trade advertising, with more intensive, consistent and developed message placement to buyers than in their consumer advertising. For example, they took a coloured back cover advertisement for the annual British Industries Fair catalogue, while other firms limited themselves to black and white inner page advertisements. They also used the trade fairs to mount publicity events, staging a fashion show at the 1935 British Industry Fair<sup>47</sup> and putting on a display of fabrics and frocks in the new fashion section of the 1931 Ideal Home Exhibition.<sup>48</sup>

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<sup>47</sup> The fashions were designed by a range of manufacturers and retailers: Harrods Ltd., Robertson, Ledlie, Fergosun & Co. Ltd., Shingleton & Co.Ltd., G.T. Hussey & Co. Ltd., The Dalton Manufacturing Co. Ltd., Paquin Ltd., R.L.F. & Co. Ltd., Ritchie, Eakins & Co. Ltd. and

There are clear differences shown in their advertising style and approach to different media channels, whether consumer magazines or trade periodicals. In their advertisements in *Draper's Record* from 1921 onwards, most have full-page colour illustrations of a stylish female figure clothed in fashionable dresses of Ferguson fabric. The customer identity is central – with advertisements giving a visualisation of benefits and value to the consumer (of the value chain), rather than focusing on the product features or the brand. There is a change in the emphasis of the role identity portrayed, from rather challenging, unconventional young women in the 1920s with strong individuality in the characters illustrated to a more conventionalised, distanced figure in the 1930s – very elegant and stylish, but with minimal detail in the face and no individuality of character between illustrations. All maintain the emphasis on the fashionably dressed consumer. Emphasis on the clothing end-product rather than their printed fabric is also shown in the fashion parade in the 1935 British Industries Fair and display of dresses at the 1931 Ideal Home Exhibition, in the Chanel sponsorship of particular fabric collections<sup>49</sup> and the provision of model gowns for display to retailers. This sublation process is assisted in many of the Ferguson advertisements by the use of print samples collaged into the image. By contrast, in the *Draper's Organiser* advertisements to the trade, the focus is on the textiles themselves, with decorative arrangements of prints filling the space. This is varied with a series in the later 1920s when the fabrics are shown as cut-out figures of crinoline ladies and one in 1930 with fabric collage scenes of butterflies, flags, lambs, a ship and girls on a beach. Trade buyers are likely to have seen both sets of advertisements, so supporting the strong consumer image represented in *Draper's Record* with the illustration of actual fabrics and more cognitive approach of the description of product qualities given in *Draper's Organiser*.

The Ferguson Bros. Ltd. trade advertisements also consistently emphasised the quality and innovation of the fabrics. For example, in March 1931 Crepe Carlora: was described as ‘A lovely new fabric of the crepe-de-chine type with an intriguing weave that makes it positively ‘crush-proof. In fascinating patterns and lovely colourings, it makes up into delightful spring frocks.’<sup>50</sup> In 1935 Carsella was promoted as: ‘Marocain will be the most popular material for dresses this season - and Carsella will take the honours. Ferguson – as a result of extensive experimental work – have evolved a special new marocain which not only looks the high class material that it is, but has a good woolly handle. Unlike so many marocains, Carsella by virtue of its exceptional design has overcome the ‘slipping’ defect.’<sup>51</sup> They are positioned as the technically innovative leader product of the most fashionable fabric type – crepe de Chine in 1931 and marocain in 1935. Prices are rarely given, in contrast to the highlighting of this in competitors’ advertisements, but there were cues in the description to indicate the inexpensive prices of many of the proprietary textiles. During the crisis period of 1930-1 of the economic crash and depression, Ferguson Bros. Ltd. invested heavily in advertising, with full-page advertisements each month

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Brownstones Ltd.

<sup>48</sup> DB 110/ 224, *The Drapers' Organiser* advertisement, March 1931.

<sup>49</sup> Stated in advertisements in April 1933 and Special Spring Issue 1936 *The Drapers' Record* and 1939 *Vogue*.

<sup>50</sup> DB 110/ 224, *The Drapers' Organiser*, March 1931.

<sup>51</sup> DB 110/ 224, 1935 BIF catalogue advertisement.

in *The Draper's Record* and frequently also in *The Draper's Organiser* and additional black and white advertisements in newspapers and the tailoring press.

An advertising campaign to consumers was run infrequently, with identical full page advertisements in mainstream women's magazines such as *Coming Fashions*, *Mab's Fashions*, *Fashions For All*, etc. These campaigns act as reminders for Ferguson Fabrics, with a series of graphical icons to promote the wider corporate brand and details of specific textile brands given in the text panel. For example, in 1928, there are small iconic symbols of girls with crinoline skirts shown in varying poses, over a headline of 'Distinctive and Elegant', 'Distinctive' or 'Autumn Fabrics', above a block of descriptive text and within a scalloped border. In 1931, the graphical style is different: no border, a large grey illustration panel showing three women waving handkerchiefs, standing on or by large 'Ferguson Fabrics' lettering. The series varies the other element in the illustration that the women were waving to – in various months, three aeroplanes, three horses or six swimmers diving. The advertisements in *Vogue*, however – perhaps because it has better quality gloss paper, or as a higher income market segment – do seem to be different and include photographs of a model in clothing made from Ferguson fabric. Fashionable status is indicated by reference to Paris ('Voiles and crepes and novelty cambrics, in clever colours and designs with that unmistakable, expensive Paris look') and haut couture designers ('Chanel's 1933 cottons and artificial silk crepes are produced only by Ferguson's in Great Britain. They're enchanting enough to make one swoon'). The front cover of *Coming Fashions* was taken in April 1930 to promote 'Ferguson's Fergosheen' showing a woman wearing a soft, draped outfit in a large Modern floral print, against a Neoclassical folly and landscaped grounds. This is a rare example of their use of the developed sublation effect displayed in *The Draper's Record* being applied in consumer advertising.

In addition, direct advertising to the consumer was sometimes funded as joint advertising campaigns with retail customers.<sup>52</sup> Promotional sales material (diaries, showcards, fashion news booklets, leaflets), fabrics and model gowns for retail display were supplied free, therefore focusing their marketing communication messages direct to the consumer.

Sales income data for the print department is available (both home and export). It shows a steep increase from 1918 to 1929, with dips in 1919, 1921 and 1923. There was a fall in 1930-1 and in 1935-6. Overall, there appears to be stronger results here than in the general home market figures, with highest sales in 1929, 1932-4 and 1939 but good sales maintained from 1926-41 apart from the dip in 1934-5.

### **Calico Printers' Association**

The CPA was the largest print company in Britain, with about 65% of production capacity.<sup>53</sup> However, it had a very limited use of advertising, with factual text-based advertisements in the BIF catalogue and a few adverts of their Graftons prints in the

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<sup>52</sup> 'Joint advertising scheme with Lewis's Ltd. for Manchester, Liverpool and Birmingham stores for 1 month at £1000.' DB 110/ 229 1928-37 Directors' Minute Book, 4/3/30. Smaller joint schemes ran in 1933 for £200 and in 1934 and 1935 for £300. Ibid., letter to the London Press Exchange Ltd, 4/12/33.

<sup>53</sup> Turnbull, G. op. cit.

*The Draper's Record*. They primarily relied on links to wholesalers, being very cautious about selling direct to retailers for fear of alienating their main customers. It was not until April 1937 that a sub-committee suggested that an experimental range of the highest quality dress goods be offered to retailers, eventually offering the whole range. They primarily printed on standard cotton cloth, rather than experimenting with artificial fibre fabric mixes or innovative finishes.

In *The Draper's Record* advertisements for Grafton's Cretonnes in 1931, they highlight a few new designs (of unadventurous taste) stating which wholesalers are the distributors for each. There is also a 'Cepea Fabrics Sixline Guarantee' advertisement that covers a wide range of dress fabrics and cretonnes. They had several brands for the home market: Grafton Cretonnes (changed to Grafton Furnishings in c1932) for their furnishing textiles; Cepea fabrics for dress prints; and Amazon and Mayfield for overall fabrics. 'Cepea' was used as a brand label for dress prints with guaranteed fast dyes from 1925<sup>54</sup> but in September 1931, the CPA announced in the trade press that all dress fabrics merchanted by the Association would be labelled 'Cepea Fabrics', with the guaranteed fast dyed prints marked with 'Six Line Guarantee' in addition.<sup>55</sup>

Direct promotion of their dress fabrics to the home trade consumer occurred in 1928, with a series of mannequin parades staged in retail stores around the country in late spring/ early summer, requiring six troupes of mannequins in 1931<sup>56</sup>, but in 1932 the expense led them to be 'restricted in future.'<sup>57</sup> They also advertised occasionally to consumers – Cepea dress fabrics (cotton serge, 'Sheenore' and 'Undevoile') were given a half-page descriptive advertisement in May 1921 *Coming Fashions* and Grafton's cotton voile dress fabric and Chiffonelle lingerie fabric was publicised in June 1921. High expenditure on advertising to stimulate trade is evident in the post-war period (the CPA had an advertising budget for the Season in 1920/21 of £39,710 and of £30,000 for 1921/2<sup>58</sup>). In February 1926, it was decided to advertise Cepea Fabrics by placing a full-page advertisement in the *Daily Mail* and initiating a scheme of free gifts to purchasers of Cepea fabrics (funded from the advertising budget).<sup>59</sup> Increased advertising also occurs in 1934/5, when price cutting in the home market was undermining profits: in 1933/4 £18,559 was spent while a budget of £30,000 was spent in 1934/5.<sup>60</sup>

Analysis of the effectiveness of their marketing strategy to the home market is indirect, since only print production or volume of prints exported figures are available for 1928-35: their home market print sales seem to have increased from 1930-34 and declined in 1935. The inferred positive results during the Depression may have been influenced by the fashion shows in retail outlets from 1928-32, but there is little detailed information on their advertising for this period. Overall production was dominated by export, which fell to half its previous level from 1929-31. The

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<sup>54</sup> Registration of the brand for export was noted in M75/ Directors' Minute Book No. 9, 24/11/25

<sup>55</sup> 'C.P.A.'s New Branding Policy' (1931) *The Drapers' Record*, 12/9/31.

<sup>56</sup> 'CPA Mannequin Parades' (1931) *The Drapers' Record*, 28/11/31.

<sup>57</sup> M75/ Directors' Minute Book No. 15, 19/9/33.

<sup>58</sup> M75/ Directors' Minute Book No. 6, 17/8/20 and No. 7, 23/8/21.

<sup>59</sup> M75/ Directors' Minute Book No. 9, 2/9/26.

<sup>60</sup> M75/ Director's Minute Book No. 17, 9/10/34.

economic problems of the company, including high costs, required a substantial cut in production capacity during the interwar period, including all seven Scottish works, eight English works and at least sixteen subsidiary companies with printing works.

### **Furnishing Textiles Print: Promotion to Consumers**

Printed furnishing textile advertising to consumers appears to have been limited in volume, in comparison to dress fabric. For example, the Casement Manufacturing Company appears in October 1928 *Modern Home*; Edward Jenner Ltd. cretonnes in July 1931 *Good Housekeeping*. This supports the hypothesis of a difference in marketing approach due to industry and product type: as lower volume turnover and less new product adoption required, fewer advertisements are necessary. In approach, consumer examples are often similar to trade advertisements, with a focus on illustrating single fabrics. However, some companies concentrate on reinforcement of brand awareness. These are firms – usually dyers – where a technical innovation aspect is considered the prime competitive advantage: the Bradford Dyers' Association 'Solprufe' casement cloths and Morton Sundour Fabrics are good examples. Occasional use of sublation imagery is seen - the 1933 Story consumer booklet has an illustration of an easy chair upholstered in their fabric<sup>61</sup>, while the 'Solprufe' series show a window with curtain, view and accessories varying for each advertisement (parrot, flowers, etc).

An additional marketing strategy was direct mail to consumers, which increased during the Depression and fell in home trade during the 1930s. Booklets were produced by the manufacturer and could be sent out by the retailer. In May 1933 *The Cabinet Maker and Complete House Furnisher* stated:

'Direct advertising is employed on a very wide scale, and some firms are building up a very successful mail-order business by means of booklets, order forms and letters signed personally by a director, accompanied by reply-paid postcards or envelopes on the 'licence' system recently introduced by the Postmaster-General. . . Economic pressure has compelled many furnishing soft goods departments to compare the results of press with direct advertising; and in view of the latter's flexibility and easy control, some firms have reduced the amount devoted to press and increased that spent on direct advertising. This development, of course, has been accelerated by the practical support given by many manufacturers and wholesaler with their leaflets, sample cards and other publicity matter, in a very attractive form, often with coloured illustration, overprinted with the retailer's name and address, such as a department could hardly hope to produce satisfactorily by itself.'<sup>62</sup>

This allowed the manufacturer or printer to communicate much more effectively with the consumer, presenting their brand identity and the core benefits of products directly to the consumer, with reproductions of the actual fabrics. Examples of such booklets are those by Warner & Sons in 1931 ('a very dainty little booklet in colour and black and white, showing a number of the firm's beautiful textiles illustrative of the art of Persia', to capitalise on the fashion for Persian style following the Royal Academy

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<sup>61</sup> 'The Furnishing Soft Goods Department: Modern Tendencies in Departmental Activity' (1933) *The Cabinet Maker and Complete House Furnisher*, 13/5/33, pp222-223.

<sup>62</sup> *Ibid.*

exhibition on Persian art<sup>63</sup>) and Story's of Kensington in 1933. Ordering direct from manufacturers' booklets and sample books was also a method taken up by consumers who lived in rural areas or at a distance from good quality furnishing goods retailers. They could thus subvert the established distribution chain, avoiding the taste choices made by retail buyers, to gain access to the more unusual or avant-garde products.<sup>64</sup> This was also a strategy used by interior designers and decorators, to supplement the retail choice available.

### **Furnishing Textiles Print: Promotion to Trade**

Furnishing print trade advertisements appear in *The Cabinet Maker and Complete House Furnisher*, in the BIF catalogues and occasionally *The Draper's Record*. Advertisements become much more frequent in the 1930s, with the more challenging economic conditions of the Depression, in which the upper market segment became much more reluctant to spend on expensive furnishings. The companies that advertise most heavily in the fall in demand during 1935-6 are the higher quality companies such as Warner & Son, W. Foxton Ltd. and Turnbull & Stockdale Ltd.

Detailed reproduction of particular fabric designs are a common advertising approach, as an appropriate strategy for the promotion of specialised, expensive products of a 'shopping' type, requiring detailed product analysis and comparison. Examples of this are advertisements by Franklin & Franklin in 1923 in *The Cabinet Maker and Complete House Furnisher* and 1931 *The Draper's Record*; Grafton's Cretonnes advertisements in *The Draper's Record* in 1931; W. Foxton Ltd. in 1933 and Warner Fabrics in 1938 in *The Cabinet Maker and Complete House Furnisher*.

A multi-segmental approach in terms of style preference was taken by Warner & Sons Ltd 1935 BIF ad emphasises their variety of design styles, from the recreation of historical fabrics to 'the liveliest interpretations of the modern trend'. This point that both the traditional and Modernist taste segments were catered to is signified with a timber-framed Jacobean style house and an International Style Modernist house. The text of the W. Foxton Ltd. 1935 BIF advertisement claims the same multi-segmental style variation: 'Printed and Woven Furnishing Fabrics of all Periods for all Purposes'. This modifies the perception of Foxton as a brand, since earlier they had become known for innovative Modern designs.

Craft skill is the core brand characteristic communicated in the W. Foxton Ltd. 1935 BIF advertisement and Warner Fabrics 1936 BIF advertisement, in both of which a craftsman is shown hand-block printing and working on a loom. As a swing in taste towards more traditional classic styles emerged in the mid and later 1930s furnishing prints, established values associated with these products and signifiers connoting quality and skill in production process were again emphasised. An earlier Warner's advertisement in 1933 also highlighted traditional craft skills, with an illustration of medieval weavers, but combined with a reproduction of a modernistic textile design.<sup>65</sup>

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<sup>63</sup> 'Soft Furnishings: Persian Style in Fabrics' (1931) *The Cabinet Maker and Complete House Furnisher*, 14/1/31, p331.

<sup>64</sup> Alison-Anne Whiting oral history interview, December 1995: her mother's practice, living in Dumfriesshire, Scotland.

<sup>65</sup> 'A craft which yet remains' Warner & Sons Ltd. advertisement (1933) *The Cabinet Maker and Complete House Furnisher*, 8/4/33.

## Case Studies: Furnishing Textile Print

### **Turnbull & Stockdale Ltd.**

Turnbull & Stockdale Ltd. had limited advertising expenditure, focusing on the British Industries Fair. Their advertising kept a consistent focus on the brand identity, with prominent display of the logo, slogan and business contact information in their advertisements. This allowed them to vary the design style of their prints widely, in response to changes in social changes and fashion trends, without confusing the identity of the company. Turnbull & Stockdale Ltd. used a logo of a hand-drawn rose as a company signifier, with the slogan 'As English as the Rose', emphasising a traditional national style of furnishing prints. There was a transition from this plain text and logo format in 1933-4 BIF catalogues, emphasising the English provenance of the products, to domination of the advertisement by photographs of abstract textiles in 1935-6. The 1936 BIF catalogue advertisement emphasises artistic and craft quality, showing a palette and weaving shuttle with threads against a backdrop of patterned fabrics 'For over half a century, Rosebank Fabrics have owed their success to the close collaboration between artists and craftsmen'. Although the style of the palette and display is fairly traditional, the printed fabric designs are in Modern style, with geometric abstraction and stylised leaf designs: the more innovative designs from the range.

A 1933 booklet for consumers (shown in an article in *The Cabinet Maker and Complete House Furnisher*<sup>66</sup>) indicates a movement to a less staid image, with a bunch of flowers represented in a loose Modernist style and the slogan 'Home Harmony'.

Turnbull & Stockdale Ltd. home market sales income data is available from 1928 to 1940. It shows a rise in 1928-9, mild decline 1931-2 with strong rise 1933-7 though a reduced rate of increase for 1935-6, stable 1938-9, and fall 1940. These are very positive results, almost doubling sales income from 1931-7. The reduction in purchasing power for furnishing textiles in the 1930s noted earlier does not seem to have significantly affected their sales. Although advertising may be a small part of this success, the consumer booklet may have been an effective measure.

### **Morton Sundour Fabrics Ltd.**

Morton Sundour Fabrics Ltd. tied their Sundour brand name to a signified meaning of fast quality dyes in the initial 1906-8 advertisements launching the brand, Sundour Unfadeable Fabrics in the early 1920s and a series of Standfast prints advertisements during the 1920s<sup>67</sup>. Morton Sundour Fabrics took colour advertisements on the back cover of *Coming Fashions* in 1921 for four months, stating that 'The colour element in Sundour Unfadeable Fabrics is indestructible, thus ensuring lasting harmony in home furnishings.' The Standfast campaign was launched in 1923 to promote the Standfast prints, with designs by Charles Paine and text by the Charles Hobson advertising company of Manchester, replaced by Fred Phillips of Baynard Press in the late 1920s. In addition to this series of advertisements, they also promoted a separate

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<sup>66</sup> 'The Furnishing Soft Goods Department: Modern Tendencies in Departmental Activity' (1933) *The Cabinet Maker and Complete House Furnisher*, 13/5/33, pp222-223.

<sup>67</sup> Morton. J. (1971) *Three Generations of a Family Textile Firm*, Routledge and Kegan Paul, pp280-6.

sub-brand of Cumberland Prints, with their advertising emphasising the quality of the product and positioning the prints as a premium price/ high status brand to the trade (in *Draper's Record*) in September 1921: “Distinction” the keynote of Cumberland Prints’ with a richly coloured textile on an easel, entitled ‘The Chinese Dragon Design’, filling the frame. This built on the company’s established market positioning for high quality block print furnishing fabrics, but was unfortunate in timing, as it coincided with the economic crash, occurring due to the collapse of highly inflated post-war prices. In December 1928, they took the front cover of *The Draper's Organiser* with a large colour illustration showing curtains in ‘Sundour Artificial Silk Damask’. The image represents an interior of a drawing room, with ‘William and Mary period window treatment’, demonstrating sublation advertising.

A new range of cheaper prints were introduced in the Depression, with the decline of the luxury market due to the stock exchange crash. In the 1933 British Industries Fair catalogue, the MSF advertisement promotes Sundour Speedwell Prints, an ‘inexpensive, quickselling’ range with the same guarantee against colour fading of other Sundour Fabrics. The lower price positioned products are a brand extension of an established Sundour brand, with the advert reinforcing the primary differentiating product feature of unfadeability (based on product innovation in dyestuff research and development). The MSF Board approved an increased advertising expenditure on 31st July 1935 during the fall in home trade sales in the mid 1930s. The new advertising campaign was initiated by Alastair Morton, with the appointment of Crawford’s advertising agency, led by Ashley Havinden as art director, resulting in Ashley’s ‘Sundour flower’ as a new brand logo/ identity.<sup>68</sup> However, in February 1936 the minutes stated that department profits were lower due to increased advertising costs, and that it was doubtful if they could continue to afford the £1,000 per year. They reduced their advertisements to half pages, and booked four in *Punch*.<sup>69</sup> In June 1936 a separate Carlan brand for lower quality wholesale goods was established: bulk wholesale trade for large retail distribution organisations ‘should be developed to the advantage of Standfast but disassociated with Sundour.’<sup>70</sup> A similar branding strategy was the promotion of Edinburgh Weavers as a high profile Modernist design company, with a distinct brand identity from the more traditional design image of Sundour.

They addressed the consumer with some joint advertising campaigns in daily newspapers with retailers in the 1920s, in which co-operating retailers were supplied with layouts to attach their names.<sup>71</sup> Their broad approach can be seen in the recommendations for an export market promotional strategy in the Osborne-Peacock report for MSF in 1940<sup>72</sup>: trade press advertisements for the export markets targeted,<sup>73</sup> public press and periodical advertising, trade circulars, sales aids for retail stores and special sales aids for co-operating stores.<sup>74</sup> Particular Sundour ranges were selected as

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<sup>68</sup> *Ibid.*, p412.

<sup>69</sup> GD 326/ 268.

<sup>70</sup> GD 326/ 228, 5/5/36. On 2<sup>nd</sup> June 1936, ‘Carlan Textiles Ltd’ was registered as the name for the bulk wholesale trade.

<sup>71</sup> Morton, J. *op. cit.*, p286.

<sup>72</sup> GD 326/ 319 letters re. 1940 advertising campaign.

<sup>73</sup> *Ibid.* *The Draper* for Australia and New Zealand, *The Drapers' Organiser* Export Number for Australia and New Zealand, for South Africa and for South America; and *The South African Buyer*.

<sup>74</sup> GD 326/ 320.

suitable for Australia and New Zealand, South Africa and South America (mainly Argentina), emphasising the lower ranges, not the most exclusive. The strategy was to link the fabrics to existing high-class retail stores (Myers Ltd in Melbourne and Adelaide, David Jones Ltd. in Sydney, Auckland and New Zealand and Gath & Chaves (Harrods) in South America).

MSF home trade print figures are not available but the print and finishing department sales income is available from 1914/5 to 1929/30 (years from July to June). This shows a steep rise from 1916/7 to 1919/20, a fall to fairly stable level 1921/2-1923/4, then a fairly sharp fall to 1925/6, rise to new (lower) stable level 1926/7-1928/9 and sudden fall in 1929/30. This appears to be a very poor result, particularly the degree of drop in 1929/30. However, the sales results of their print subsidiary company was much more positive: Standfast Dyers & Printers Ltd. records are available from 1924/5 to 1930/31 and show that their income from MSF print sales increased from 1924/5 to 1929/30, with a steeper improvement in 1927/8 to 1929/30. The contrast in these sales patterns is likely to be due to the greater success of cheaper roller-printed goods from Standfast, compared to the high quality block-printed fabrics (sold as Cumberland prints). Standfast's commission piece goods sales expanded quickly, particularly in 1925/6-1926/7 and 1929/30-31, an impressive achievement during the depression. Print commissions improved from nil in 1924/5 to £28,285 in 1927/8. The expansion of commission sales may be due to the fast dyes developed by Sundour, which were available to other companies: this implies that the communication to the trade of the value of the unfadeability claims was successful. However, the brand-based focus on unfadeability of dyes in consumer advertising does not seem to have been very effective, though it may be that the separate branding of Cumberland Prints confused consumers, preventing them associating it with the unfadeability connotations of Sundour.

## **Conclusion**

The home market demand for dress prints expanded during the 1930s, due to price reductions consequent upon the development of high quality cheap artificial silk fabrics and competition from export market-based companies under severe financial pressure. Overall, an investment in advertising to stimulate trade was a consistent response to economic context in periods of economic depression or crisis. However, as a primarily commission-processing based industry, few textile print firms advertised their goods directly, relying on other parts of the value chain to act as the entrepreneurial engine that marketed products. Other print firms based their promotion effort on sales to trade buyers made by travelling representatives and by participation in trade fairs. Dress fabric was mainly advertised to consumers by artificial silk manufacturers with a strategy of focusing on product brand awareness, with frequent reminder advertisements for new or fairly new branded products. As the artificial silk sector was a rapidly expanding sector of the dress fabric industry in the industrial growth stage, a focus on new product launch and the process of adoption by consumers required frequent advertisements for this type of product, to inform and develop product brand awareness. The Schumpeterian, high turnover, high fashion nature of the industry also required a high level of advertising expenditure to trade and consumer markets. As these companies had a high-turnover, low price marketing strategy, they aimed for mass-market consumption and consequently there is little market segmentation in their advertising of product brands.

Imagery in dress fabric advertisements to consumers predominantly focused on the end product, with illustrations of female figures shown in fashionable clothing, rather than reproductions of the textiles. This is due to the expectation that most consumers would make up their own clothing and the aim of stimulating their imagination of the end product – themselves in new, stylish fashion – to motivate them to purchase the fabric. This construction of consumer image is a sublation process that makes the products more accessible and appealing to the customer. Ferguson Bros. Ltd. applied a sophisticated version of this approach to the trade press, with heavy investment in full-page colour advertisements showing paintings of developed consumer characters. This conflates the stylish consumer image with the brand personality and encouraged the trade buyer to visualise consumers buying the fabrics as a highly stylish (but inexpensive) brand: it put the company in dominant market position for the large ‘style snobbish but not price snobbish’ segment. They took a much more affective, emotional approach in most of their trade advertisements, emphasising their core benefits of distinctive, stylish design using visual imagery, while their consumer advertising was more brand-based, with textual persuasion of the value of their fabrics.

Advertising to trade customers was predominantly by print firms or vertically integrated manufacturer-printers, rather than the artificial silk manufacturers. A different approach was taken in the advertising compared to consumer-focused communication: the standard practice was to concentrate on the product design, with reproduction of actual textile samples rather than broader signifiers of product brand connotations. Fashion images are still shown, but either with the print collaged on to it or as a smaller icon, signifying the clothing type and appropriate usage for the textile.

The differences observed between dress and furnishing sector advertising indicate that advertising approach and broader marketing strategy is influenced by the competitiveness type of the industry and its stage of industry life-cycle. Furnishing prints are advertised rarely during the 1920s, as the promotion practices of a stable, mature industry was based on established B2B sales networks. They advertised more intensively in the 1930s during a period of economic uncertainty, with reduction in spending by the upper income groups. They promote a known corporate brand using an advertising approach that reinforces brand values rather than the more informative, product brand awareness approach taken by the dress goods manufacturers. A common promotional strategy for furnishing textiles, appropriate to its shopping type product category, was to focus on the details of the product itself, with advertisements reproducing a specific print.

It is difficult to relate marketing campaigns of the case study companies directly to sales results, but a positive effect may be indicated by direct consumer point-of-purchase promotion measures, such as the consumer booklet by Turnbull & Stockdale Ltd. and the CPA’s fashion shows in retail outlets. The trade-focused advertising strategies of Ferguson Bros. Ltd. and Turnbull & Stockdale Ltd. appear to have maintained good sales, while the advertising by Morton Sundour Fabrics focused almost entirely on the ‘unfadeability’ factor seems to have been effective in generating commission-processing business, but insufficient to counter the depression in the expensive, high quality block print sector.

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