Essential facts: the nature of designer fashion and its markets.

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ABSRACT
Designer fashion receives little serious attention in the Cultural Management and Policy fields, because it remains largely private with little public sector engagement or funding Intervention. It is, however, a recognised sub-sector of the cultural industries, (Eurostat ONS, Australia Bureau of Cultural and Leisure Statistics), which continues to contribute to the cultural economy in countries such as the United Kingdom, Italy and China.

This paper sets out to provide empirical data on the designer fashion sub-sector, including employment, size of businesses, type of businesses, location, markets, training and development, Investment profiles and priorities, based on primary research funded by the Department of Culture Media and Sport, in the North-West and Yorkshire and Humber regions of England.

These regions have long traditions stretching from the Industrial Revolution in the nineteenth-century in wool and cotton production and clothing. However, this production has progressively declined to be replaced with the "new economy" activity including media and designer fashion.

The research described in the paper addresses definitional questions, which arise from a sub sectoral analysis, provide important data on the sub-sector, which has explicit policy implications for cultural agencies, business support organisations and economic development activities. Perhaps more significantly it poses important questions for public policy makers and managers with regard to the purpose of public sector interventions in the designer fashion sub-sector of the cultural industries.

Introduction
The need to define the sector is central to any attempt at collecting data and the importance of being precise about the descriptors for sub sectors. This is where judgements are needed to reflect the extent of a sub sector within the accepted national norms such as SIC and SOC and avoids some of the problems of overlap or double counting. It also raises the question as to who is being counted. In this case the research focussed on the fashion designer whether working as a sole trader or in a small to medium enterprise.

The sources used to inform the DCMS mapping document, 2001 referred to and which form the base comparative data are largely national, for example the Department of Trade and Industry, at the United Kingdom Fashion Exports, and the DCMS Creative Industries Mapping Document, 1998 as well as Mintel 2000 (website).

Designer fashion: *essential facts* is based on regional primary data collection and as a result provides a contemporary picture of the industry. It is a snapshot of the sector in, two Northern regions and provides baseline data for those with a direct interest in designer fashion, or as a mechanism with which to pursue economic and social goals.

A Creative Industries sub sector: Designer Fashion, a popular or elitist definition?

This typography may be generally sufficient, however the problem occurs when a sub sector of the creative industries is mapped onto the sic/soc codes for example designer fashion. As it stands designer fashion is incorporated into the following categories,

- 17.71, 17.72, 18.21, 18.22, 18.23, 18.24, 18.30, 19.30.

The relevant soc codes amounted to one, 383, clothing designers. The question is how does the breakdown of designer fashion reflect the nature of the activity as described by DCMS in the Mapping Document on the one hand and what the sector understands on the other. in other words what ever the general typography, a further interpretation is required in order to generate a detailed, a shared understanding of a sub-sector. This interpretation is arguably, one that the sub-sector its self should have a major stake in deciding, within the overall sic and soc typography.
In the case of the DCMS, Creative Industries mapping document, 2001 the "Mintel" definition of designer fashion is used encompassing four key sectors:

- Couture: the original designer market dominated by French based international brands: Dior, Chanel, and Y S L;
- International designers: the label usually dominated by one name: Donna Karan, CK;
- Diffusion: designers producing high street ranges for specific stores for example, Clemence, Dorothy Perkins, Jasper Conran at Debenhams;
- High fashion: up and coming new designers usually endorsed by celebrities.

This defines the core activity with related, and peripheral, activities with reference to associated industries. In the first DCMS Creative Industries mapping of document 1998, designer fashion with the related and peripheral activities described as:

- Fashion photography
- Haircare and cosmetics
- Accessories,
- Perfumes,
- Modelling,
- Magazine publishing
- Design education
- Graphic design
- Product design
- Textiles
- Clothing manufacture
- High-street clothes retailing

In the case of the 2001 DCMS mapping document, there has been an adjustment to the accessories and perfumes categories to accessories design, and perfumes design.
Noticeably, the mapping exercise only focuses on the core activity, which is the Mintel definition without related and associated activities. This is a particularly narrow interpretation of designer fashion derived from one source.

An alternative approach, based on consultation with those actively engaged in the sub-sector provides a realistic and “democratic spectrum”, as opposed to a limited hierarchical structure. It is after all a matter of judgment by those engaged in fashion design as to what they perceive to be their main business. A breakdown of designer fashion derived from discussions with organisations includes the following:

- Female fashion, smart
- Female fashion, casual
- Male fashion, smart
- Male fashion, casual
- Children's Wear
- Sportswear
- Underwear
- Work and protective wear
- Bridal wear
- Footwear
- Fashion accessories
- Knitwear, male and female

(Essential Facts: Designer Fashion in the North West, Yorkshire and the Humber, 2001, Roodhouse and Heaton)

This becomes sharper when placed in a regional context; that is the more detail required the greater the disaggregation of the sub sector. At national levels the definition of designer fashion is probably credible however it becomes far less so when applied at regional levels. Perhaps more interestingly it exposes a deeper issue, of who is defining fashion design and for what purpose. Other issues, which become apparent at sub sectoral level, are,

- Fashion designers working in and employed by manufacturing companies
- Fashion designers with more than one income, e.g. working in education and the industry.

Education as a source of employment and, manufacturing has been included in the definitional framework, as it proved particularly difficult to differentiate design and manufacturing activity, and design education interactions with the sector. However, perfumes design, modelling, magazine production, and high street retailing are excluded, as the active designer fashion interaction is implicit.
The guiding principle has still been to capture as much design activity as possible hence ignoring high street retail outlets. There has been an attempt to distinguish between design activity and design branding, although this at present is a qualitative assessment.
The rationale for the inclusion of such a detailed breakdown of the DCMS Creative Industries mapping document, 2001, definition mentioned earlier is to construct an accurate picture of the type and nature of activity occurring in two regions.
In particular, it is recognised that definitions by their very nature attempt to distinguish between activities, and, in the case of designers, there is a tendency to cross boundaries particularly in areas such as manufacturing, the design of accessories and engagement in educational activity.
As a result designer fashion: *essential facts* has included a substantial proportion of the related activities indicated in the DCMS Creative Industries mapping document, 1998 and 2001.

It is noted in the study, designers work in manufacturing companies, and, consequently this study has included clearly identified manufacturing activity with a design function.

It is worth noting when considering definitions that the DCMS have indicated in the Creative Industries mapping document, 2001 the size of the designer fashion industry, nationally, is as follows:

- Revenues: £600 million, 1996
- Exports: £350 million, 1996
- Employment: 11,500, 1996

This study has not attempted to calculate revenues, exports or estimate employment, but rather provide a detailed snapshot of the nature of the sector in two northern regions.

An interactive web of frameworks

Apart from, the difficulties of defining a sub sector, shared typographies of, regions, organisational definitions, size of organisations, and employment categories are fundamental, to collecting useable information and often taken for granted. Much of this is in place, and in many cases, transnational. However problems also begin to emerge when consideration is given to, for example organisational definitions. This is because of the nature of the creative industries, were there is a high proportion of creativity, in terms of employment, organisation and interaction types. The sector can be typified as dominated by micro businesses, networks, contracting and sub contracting, projects, and cross disciplinary interactions. It is a highly fluid and flexible industry, which leads to difficulties with organisational definitions and employment categories which are designed to exist for substantial periods of time for example;

Organisational definitions

- Self-employed,
- Sold proprietor
- Partnership
- Limited company
- P L C
- Not for profit organisation
- Local government
- Co-operative
- Club or society
- Registered charity
- Voluntary organisation
- Educational institutions

These definitions drawn from Vital Statistics, the cultural industries in Yorkshire and Humber, Bretton Hall College, 2000 are characteristic of the UK framework and can be found in use in he EU, Australia, and New Zealand. The definition chosen by UK Government (DTI), which is adopted in all EU member States, for the size of organisations, is,

- Micro businesses (0 – 9 people employed)
- Small-to-medium enterprises (10 – 249 people employed)
- Large businesses (over 250 people employed)

The difficulty with this breakdown of enterprise size when analysed in the context of the creative industries is the crudeness of the micro - business category, and 0 - 9 people employed. This remains a significant, ill-defined category for a sector that is dominated by micro businesses and it would be more helpful to breakdown micro businesses in order to ascertain for example, how many of these businesses operate as sole traders. Employment categories generally reflect the annual employment survey definitions, are compatible within EU member States and include,

- The self-employed (based on self-generated contractual work. This can be broken down into several categories as follows:
    - Self-employed workers and sole proprietors that operate directly within the designer fashion sector
    - Self-employed individuals to work within partnership arrangements
    - Freelance workers to provide services to designer fashion sector enterprises).
- Full-time paid work
- Part-time paid work
- Volunteers (where an individual is undertaking regular activity without remuneration)

Controversy however has surrounded the definition of the self-employed and whether the Annual Employment Survey in the UK collects specific data in this category. This has been recognised by the UK Government as particularly important not just for the creative industries but to other industrial sectors and consequently, the Office of National Statistics in the 2001 national census included a specific category for the self-employed.

Gender (male/female) and national definitions, derived from the Equal Opportunities Commission, for those with special needs and those from ethnic groupings are also utilised but these will vary to reflect the culture and population composition of individual Nation State.

Regional context

Regions in the UK are currently defined as regional development areas, which have existed for 5/6 years, and is an administrative mechanism overlapping local authorities and other regional agencies. These boundaries bear little resemblance at a local level to the location and geographical interactions of the creative industry businesses, particularly when placed in the context of globalisation.

The Northwest and Yorkshire and Humber regions are chosen for this study for their geographical proximity, common history, particularly in the development and progressive decline of the textiles and clothing industry, as well as established Further and Higher Education institutional provision in designer fashion education and training programmes. It is also the case that the regional development agencies have recognised textiles and clothing and the creative industries, which includes designer fashion, as significant industrial clusters.
So far, limited attention has been paid in these regions to designer fashion as a sub-sector of the creative industries.
The Yorkshire and Humber Region comprises the following local authorities:

- South Yorkshire: Barnsley, Sheffield, Rotherham, and Doncaster
- West Yorkshire: Wakefield, Kirklees, Calderdale, Bradford, and Leeds;
- North Yorkshire: Hull, Harrogate, Scarborough, York, Richmond, and Craven.

The Northwest region comprises:

- Manchester, Greater Manchester,
- Liverpool, Merseyside,
- Cheshire,
- Lancashire,
- Cumbria.

By adopting a regional development agency geographical boundary definition, it is possible to use this data to inform regional creative industry sector urban and rural development, encourage cross regional comparisons and move towards a establishing initial bench marks.
The creative industries baseline study, Vital Statistics, Bretton Hall, 2000, was the first primary data analysis of a region and provides a useful point of reference for this study, although the level of detailed information concerned with designer fashion is limited.

Summary of data

A summary of the findings follows, organised around the identified the key categories; people, work and training; organisational profile, resources, investment activities and development issues; geography and markets.

People, Work & Training

- Most businesses have 5 or less full time employees (42.7%), with more 75% being female.

- 24.2% of businesses employ 1-2 people full time.

- 43.1% are without contracts of employment

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- Within ethnic minority, groups employed both full and part time in the sector, the vast majority are of Indian and Pakistani origin.

- The majority of businesses (55.7%) employed fewer than five part time employees, with 29% of businesses employing no part time staff at all.

- 90.1% of businesses do not have employees with special needs (disabled) working within their organisation.

- Nearly 70% (69.5%) of businesses do not contract with the self-employed, or freelancers who work on a contract for services basis.

- 87.7% of businesses do not engage voluntary staff, and of those who do, there are only one or two people in this capacity, generally female.

- Discrete design accounts for 43.8% of all activities carried out in the sector closely followed by manufacturing.

- As expected design is a major job role, however, administrative, management and sales functions are significant activities in all types of enterprise.

- Just over 30% (31.6%) of employers and staff received training throughout the year 2001 and in 54.7% of cases where training was given, the employer paid.

- Nearly 24% (23.4%) paid for training themselves.

- Only 3.5% found training inappropriate for their needs.

- On the job and short course training are the preferred modes of delivery

Organisational Profile, Resources, Investment Activities & Development Issues

- The self employed (30.9%) and sole proprietor (21.6%) type of enterprise comprising 52.5% dominates the sector; however, there is a noticeable number of limited companies (31.9%)

- 1995 to 1999 has been identified as the most significant time for the commencement of start-ups in both regions. Overall, the sector has continued to attract new businesses and has well-established businesses.

- The main design activities appear to be associated with the female market particularly smart female fashion, casual female fashion & bridal wear, accounting for 27% of activities in both regions, 32% in the North West whereas 21.4% in Yorkshire & Humberside region.

- Manufacturing which includes design activity is a noticeable feature (36.3%) of the type of work carried out in the sector.

- Nearly 56% (55.5%) of business annual income is below £25,000, with 57.6% in the North West and 53% in Yorkshire & Humberside. However, 14.3% of businesses are generating over £1million annual income.

- In 73.5% of cases the annual income stayed the same or increased compared with previous years.

- 32.4% of financial investment is made in marketing, product development and research with a further 27.4% of resources used for plant, equipment and machinery (14.0%). as well as information technology (13.4%).

- 93.9% of companies did not receive any core or project grants and funding and those that did gained support from the local authority and the regional arts board. It is noticeable that significant other sources have been identified and that there is no evidence of take up of European Union funding schemes. For those who have received this type of support the grants have largely remained the same over the last year (50.0%).

- Private sponsorship (2.5% receive some financial support) is a minor financial factor in this sector. Similarly, only 4.5% benefited from services in kind and this was predominantly provided by private business.

- The dominant source of income, 41.9% is derived through the sale of goods and services with rents/leasing property and a second job accounting for 33.3% for much of the remaining income.

- Nearly 42% (41.8%) received business and organisational support from the banks with Business Link meeting the needs of 17.2% of the sector. Of those that accessed this support, 43.0% were satisfied with the appropriateness of the service to their needs.

- The main issues that are causing concern at present are attracting new customers, promoting the organisation and retaining existing customers.

- The current problems being experienced are identifying suitable suppliers and accessing outlets.

Geography & Markets

- Both regions accounted for 41.1% of main customers with a further 51.3% located throughout the UK.

- For Yorkshire & Humberside the vast majority (71.2%) of customers are based in the region and if not in the region the UK, with 15% being international customers

- When the Northwest is considered, the vast majority (81.3%) of main customers are based in either the North West or the UK, with international customers representing 14.4%.

- Businesses are accessing regional markets however, national markets predominate.

- Businesses do not cluster in this sector with 62.6% operating in isolation.

- 83.2% of businesses operate from one site only and are located regionally. The types of premises usually serving as the main business location are leased business premises (49.5%), followed by proprietor owned business premises (28.3%) and a small but noticeable use of the home (19.7%).

- The primary benefit in both regions derived from a close location, clustering, is sharing information, with significant interest in acquiring new customers and the sharing of plant and equipment.

A detailed consideration of people, work and training in the two regions

The sector is small in terms of employment with the self-employed, partnerships and freelancers working in designer fashion accounting for only 0.3%[1] of the self employed, freelance and partnership workforce (6.8%) in the cultural industries of Yorkshire and the Humber.

[1] Vital Statistics, The Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000 p11 fig6

31% of all enterprises in the UK employ one or more workers[2] whereas in the designer fashion sector in the two regions 24.2% of businesses employ one to two people full time, and 42.7% employing one to five full time.
Women account for 49.3%[3] of the cultural industries workforce in Yorkshire and the Humber, however, in the designer fashion sector across both regions represents 52.8% of the full time workforce and 63.2% of the part time workers.
75.7% of the cultural industries sector in Yorkshire and the Humber do not employ any workers with disability, and, in the case of designer fashion, it represents 90.1%.
There is limited use of employment contracts and amongst the ethnic groupings employed in the sector a dominance of Indian and Pakistani workers. This raises questions around access and widening participation for public agencies.
Design (including graphic and product design) as a job amounts to 37.5% of the roles and functions identified in the cultural industries in Yorkshire and the Humber whereas the job role of design represents 11.4% of all main activities carried out in the sector
It is noticeable that the employer is the main financial sponsor of training activities for employees in both designer fashion (54.7%) and the cultural industries in Yorkshire and the Humber (74%)[4]. This training has been delivered through on the job training, short courses, conferences, and seminars for the cultural industries as a whole and as a sector. There is clear evidence to support the view that the creative industries prefer to receive training on the job. Equally, once the training has been delivered it is favourably received, with 90% in the cultural industries and 96.5% in designer fashion satisfied with the training delivered.

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[2] DTI, 1998
[3] Vital Statistics, The Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000 p12 fig 10
[4] Vital Statistics, The Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000 fig15

Fig 1: The number of full time staff employed in the year ending 30th April 2001.

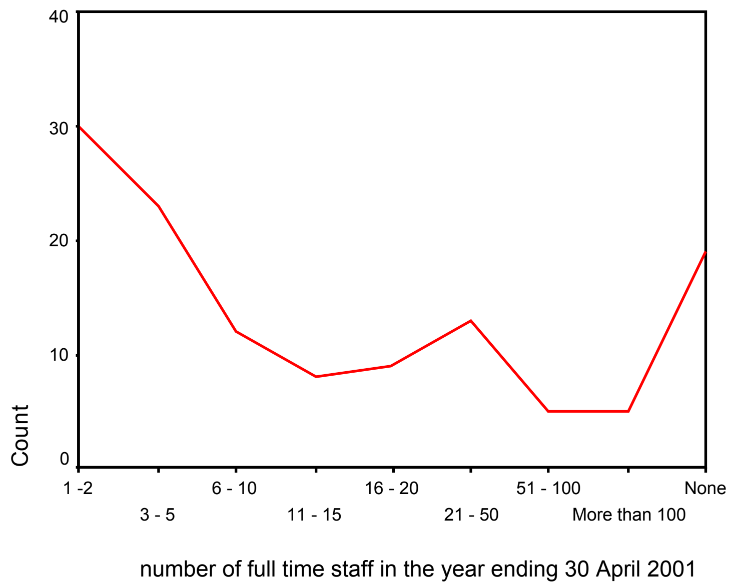


Table 1

How many full-time staff did you employ in the year ending 30th April 2001? Number=204	percentages
1 –2	24.2%
3 –5	18.5%
6 – 10	9.5%
11 – 15	6.5%
16 – 20	7.3%
21 – 50	10.5%
51 – 100	4.0%
More than 100	4.0%
None	15.3%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 2: The number of part- time staff employed in the year ending 30 April 2001

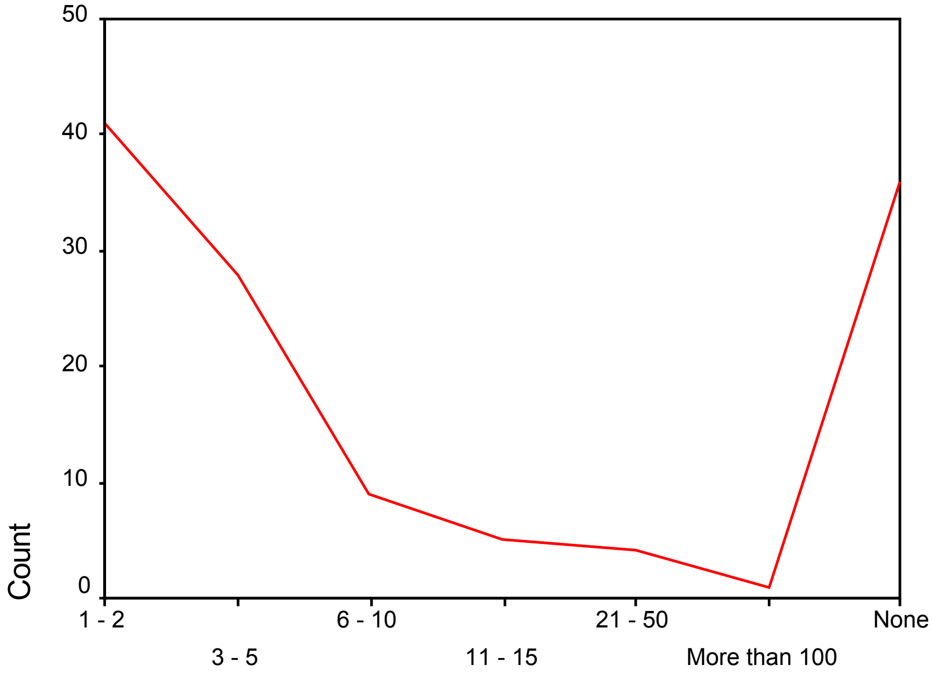


Table 2

How many part-time staff did you employ in the year ending 30th April 2001 Number=204	percentages
1 –2	33.1%
3 –5	22.6%
6 – 10	7.3%
11 – 15	4.0%
21 – 50	3.2%
More than 100	0.85
None	29.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 3: The percentage of *female full time* staff employed.

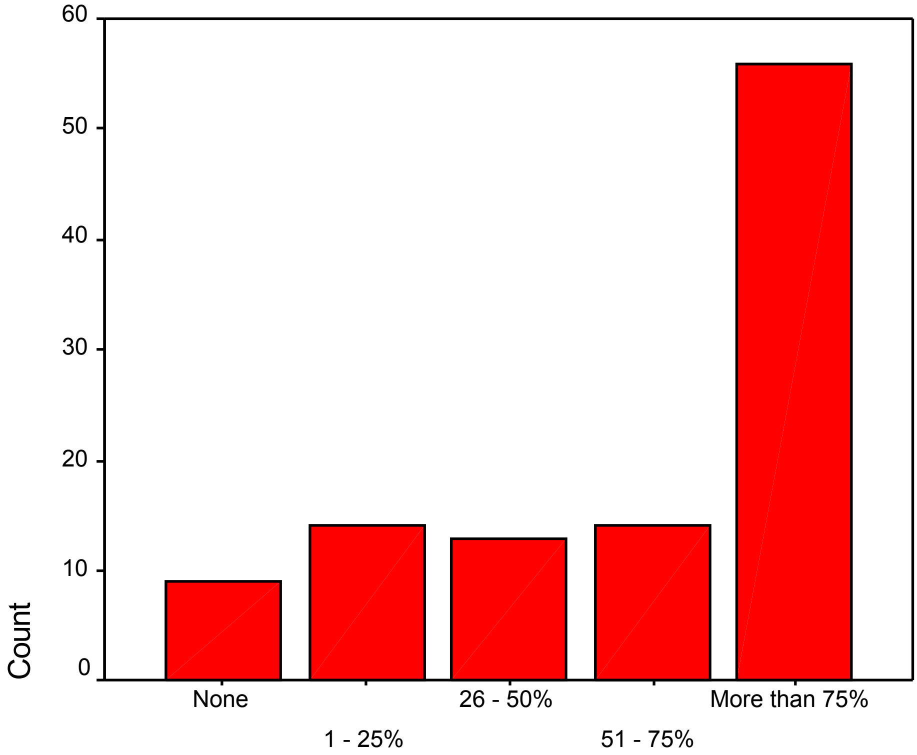


Table 3

How many full-time staff were female in the year ending 30th April 2001 Number=204	percentages
	8.5%
1 –25	13.2%
25 - 50	12.3%
51 - 75	13.2%
More than 75	52.85
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 4: The percentage of *female part time* staff employed.

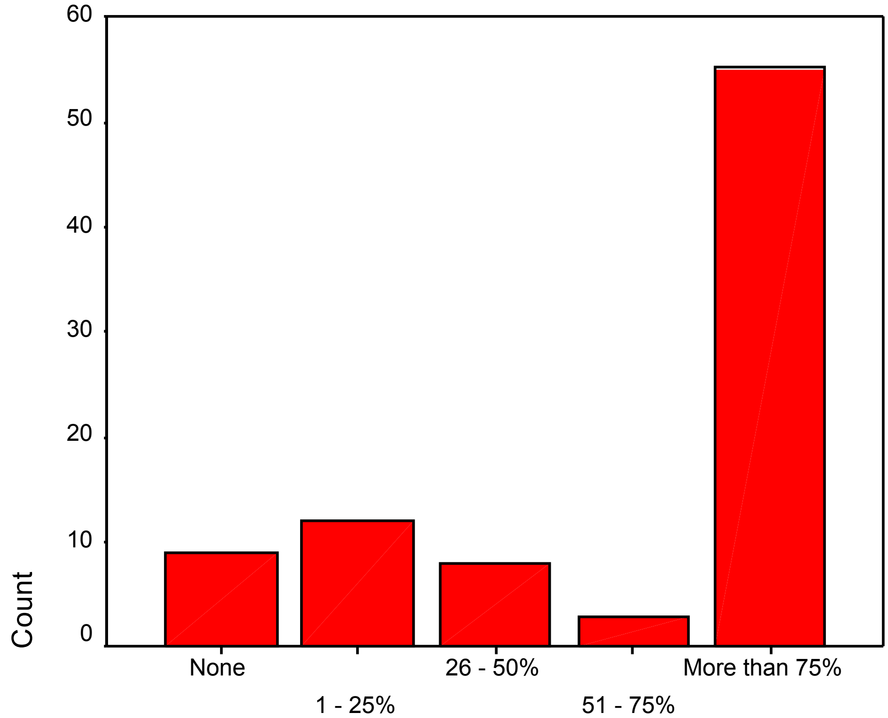


Table 4

How many part-time staff were female in the year ending 30th April 2001 **Number=204**	percentages
None	10.3%
1 –25	13.8%
25 - 50	9.2%
51 - 75	3.4%
	63.2%
	100.0%

Fig 5: The number of full time staff in employment from each of the ethnic groups.

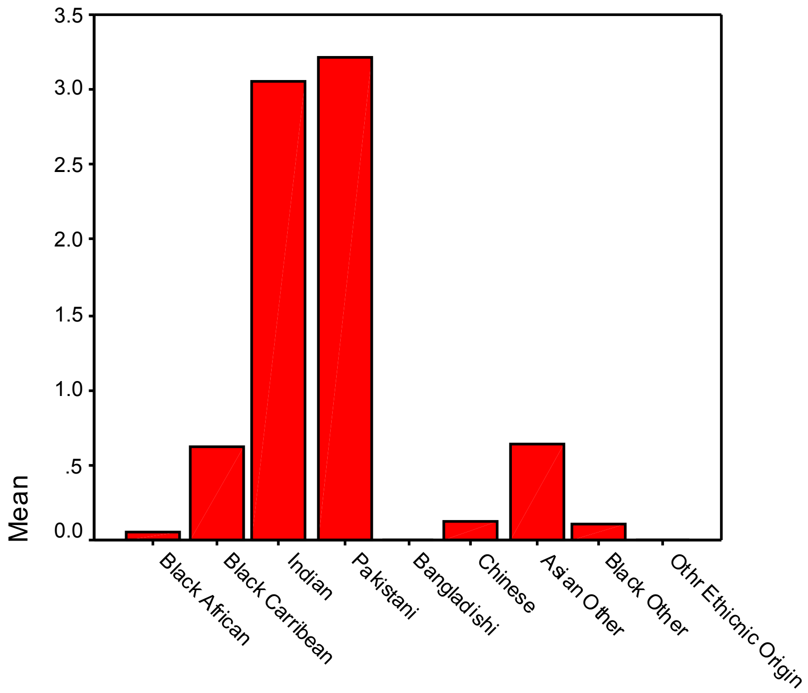
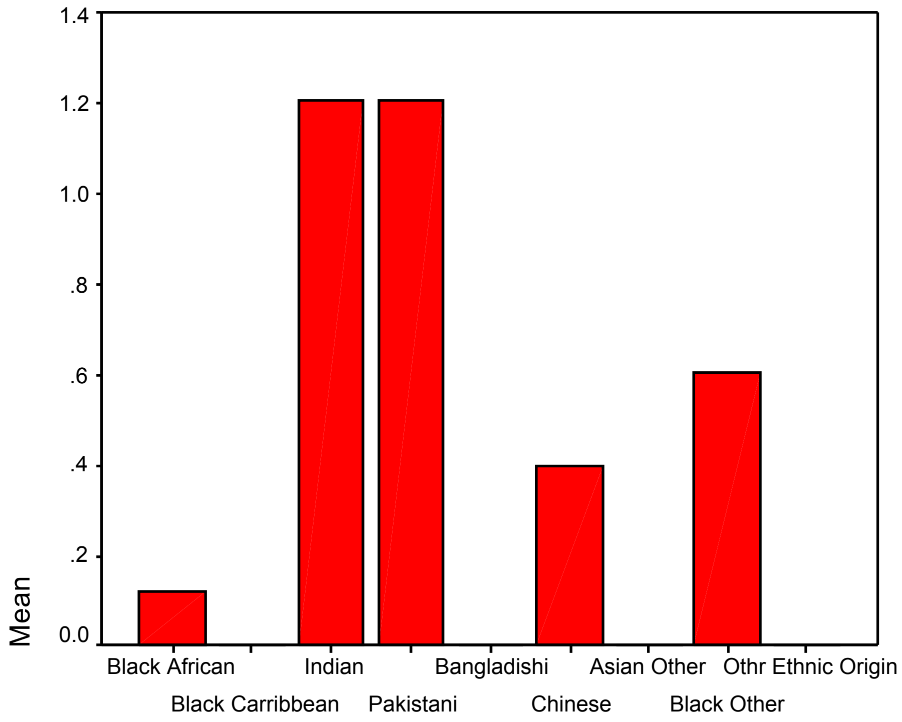


Table 5

What per our full time staff were from the following ethnic groups in the year ending 30th April 2001 Number=204	Number of workers in total across both sectors.
Black African	2
Black Caribbean	8
Indian	53
Pakistani	55
Ba	0
Chinese	2
Asian other	9
Black other	1
Other ethinic origin	0
Total	

Source: Roodhouse & Heaton, 2001

Fig 6: The mean number of part time staff in employment from the ethnic groups.



Source: Roodhouse & Heaton, 2001

Fig 7: The percentages of both full and part time staff with *special needs*.

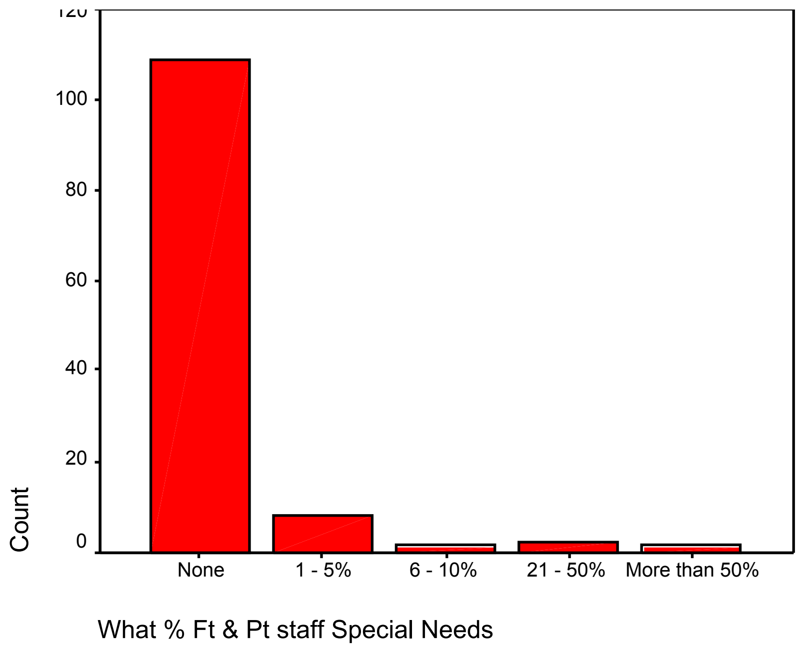


Table 6

What percentage of your full & part time staff possess identified special needs in the year ending 30th April 2001? Number=204	percentages
None	90.1%
1 – 5	6.6%
6 – 10	0.8%
21 – 50	1.7%
More than 50%	0.8%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 8: Number of staff employed with a *contract of employment*.

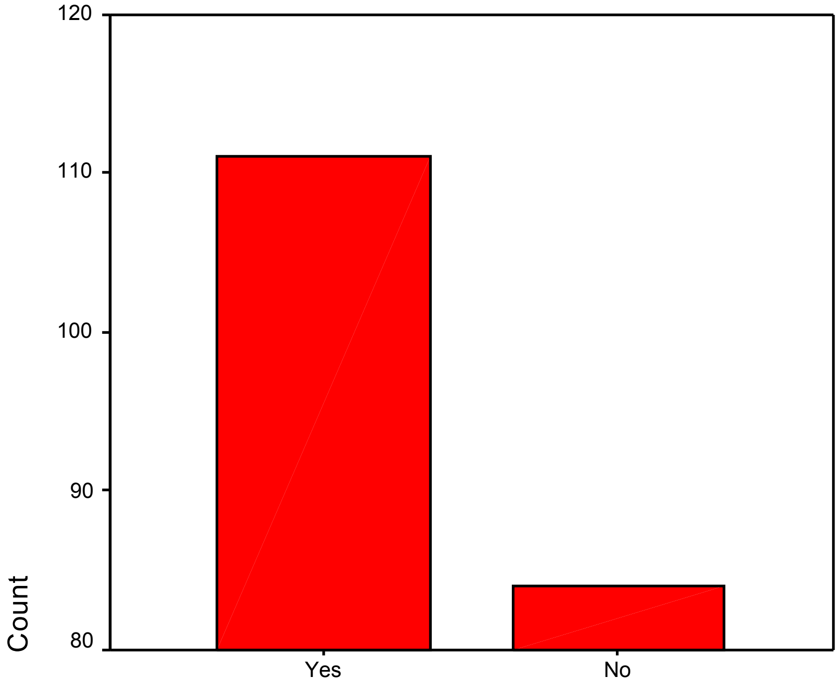
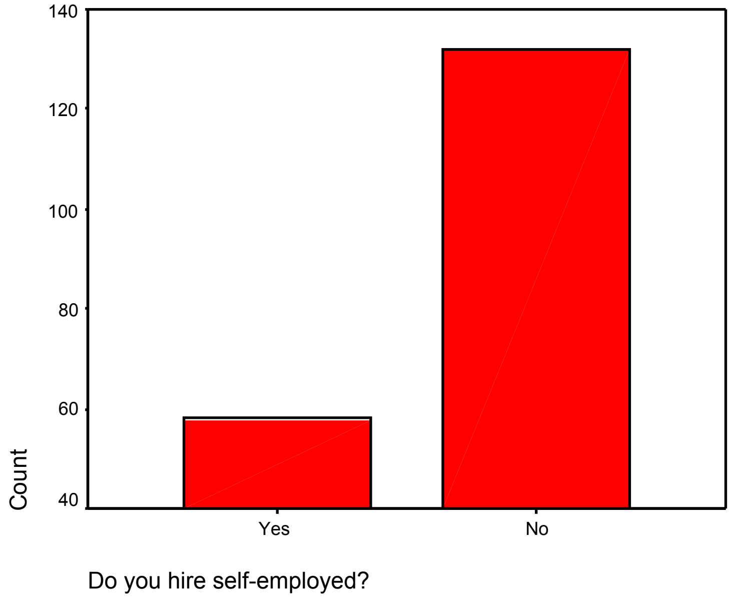


Table 7

Do you employ staff (including yourself) with a contract of ending 30th April 2001? Number=204	percentages
	56.9%
No	43.1%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 9:</u> The number of enterprises who employ the *self-employed* and *freelancers*.



Do you hire anyone who is self employed freelance or who works on a contract for service basis in the year ending 30th April 2001? Number=204	
Yes	56.9%
No	43.1%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 10: The number of people employed based on *self-employed* during the year ending 30 April 2001.

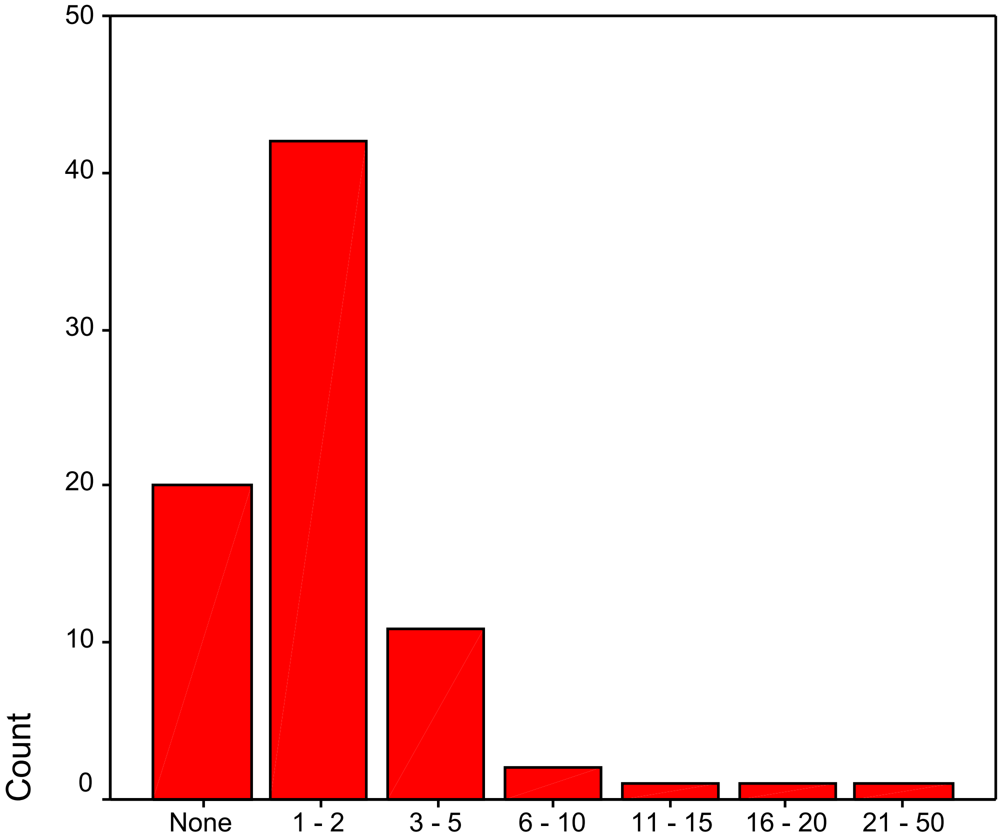


Table 9

How many people were employed on this basis in the year ending 30th April 2001? Nu	
None	2.5%
	53.85
	14.1%
6 – 10	2.6%
11 – 15	1.3%
16 – 20	1.3%
21 – 50	1.35
Total	100.0%

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Fig 11: The number of *voluntary staff* w ho worked in the year ending 30 April 2001.

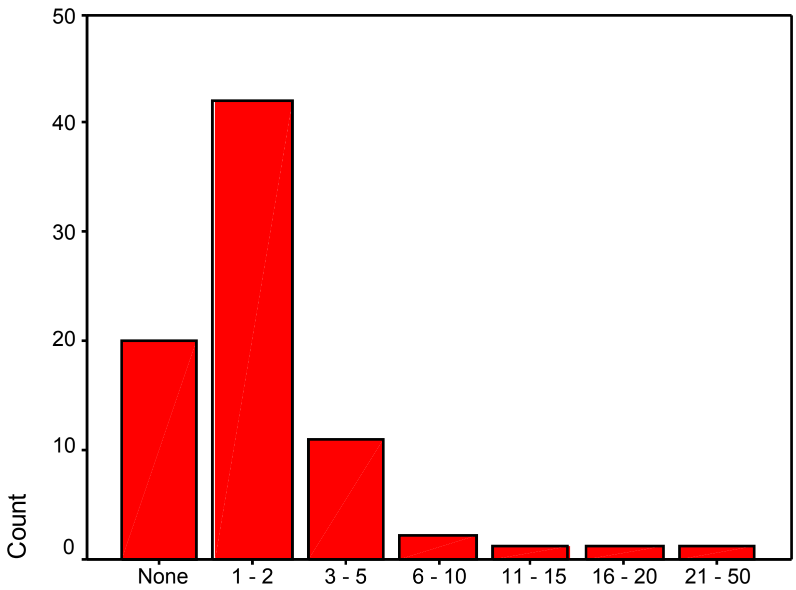


Table 10

How many voluntary staff worked for you in the year ending 30th April 2001? **Number=204**	percentages
1 – 2	9.6%
3 –	0.5%
6 – 10	2.1%
	87.7%
	100.0%

Fi 12: The number of *female voluntary staff* w ho worked during the year ending 30th April 2001.

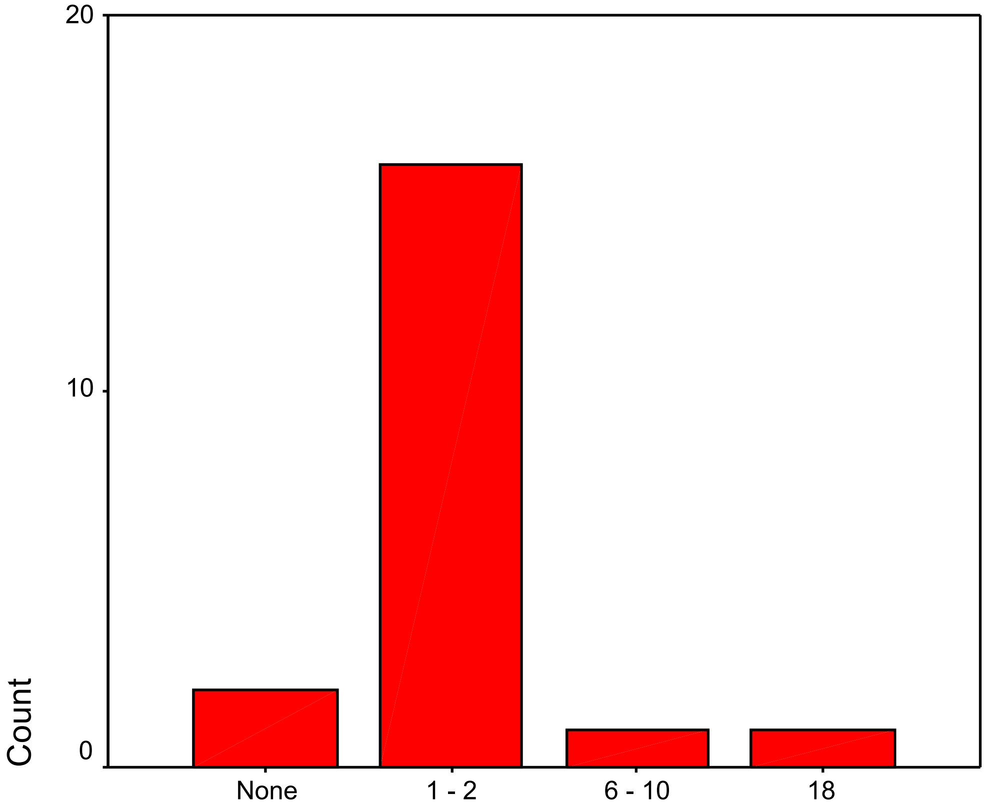
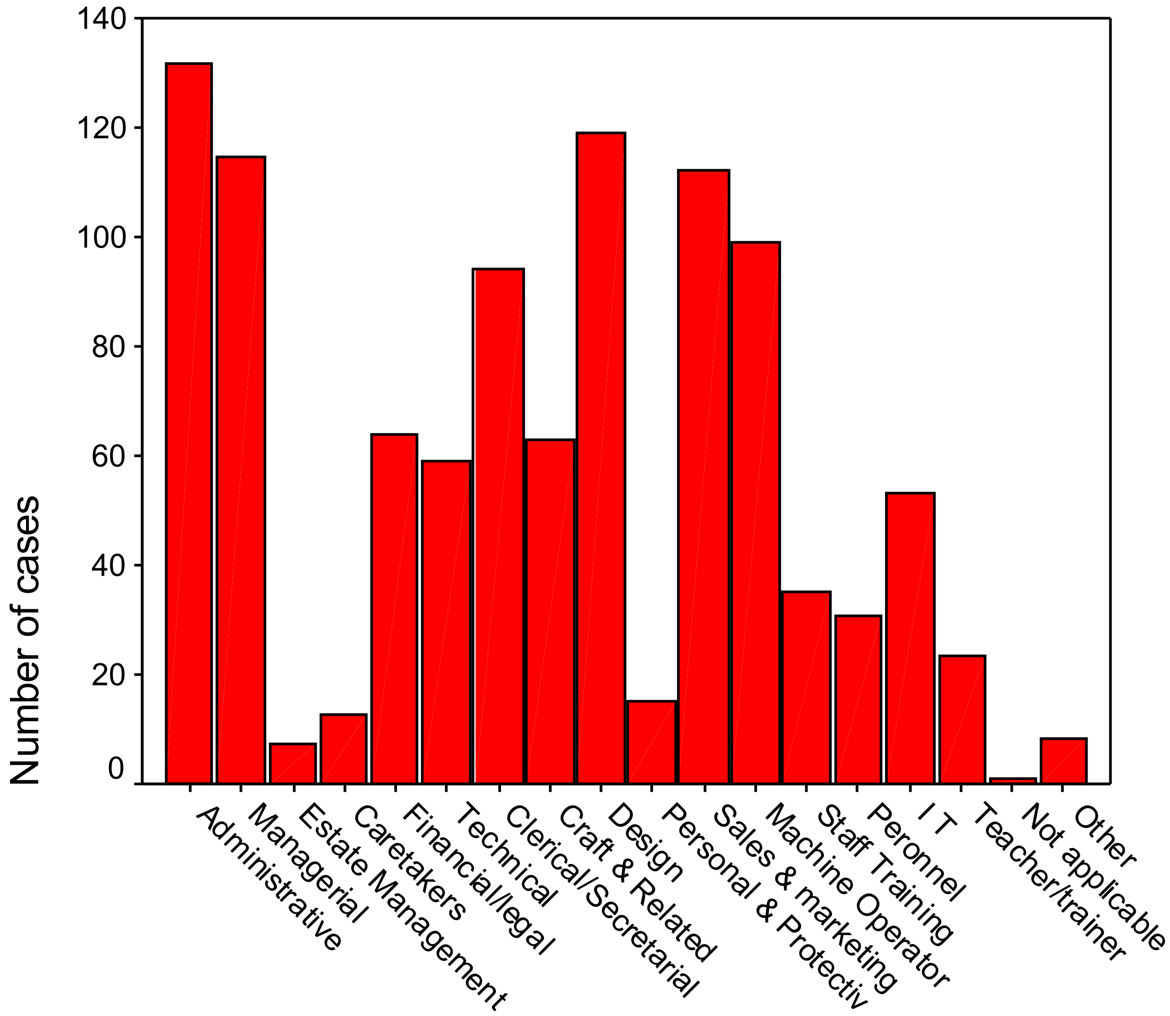


Table 11

How many voluntary staff who worked for you in the year ending 30th April 2001 were female? Number=204	percentages
None	10.0%
1 – 2	80.0%
6 – 10	5.0%
More than 15	5.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 13:</u> The main *jobs and roles* undertaken by both the employer and employee.



Source: Roodhouse & Heaton, 2001

Fig 14: *Training received* by either employer or employees during the year ending 30 April 2001.

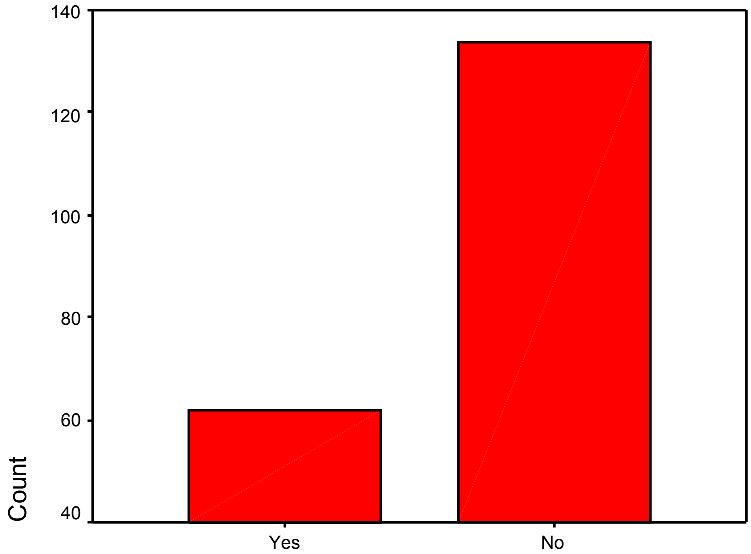


Table 13

Have you or your staff received any training in the year ending 30th April 2001? Number=204	percentages
Yes	31.6%
No	68.4%
Total	100.0%

Source: Roodhouse & Heaton, 2001

g 15: *Delivery* of training.

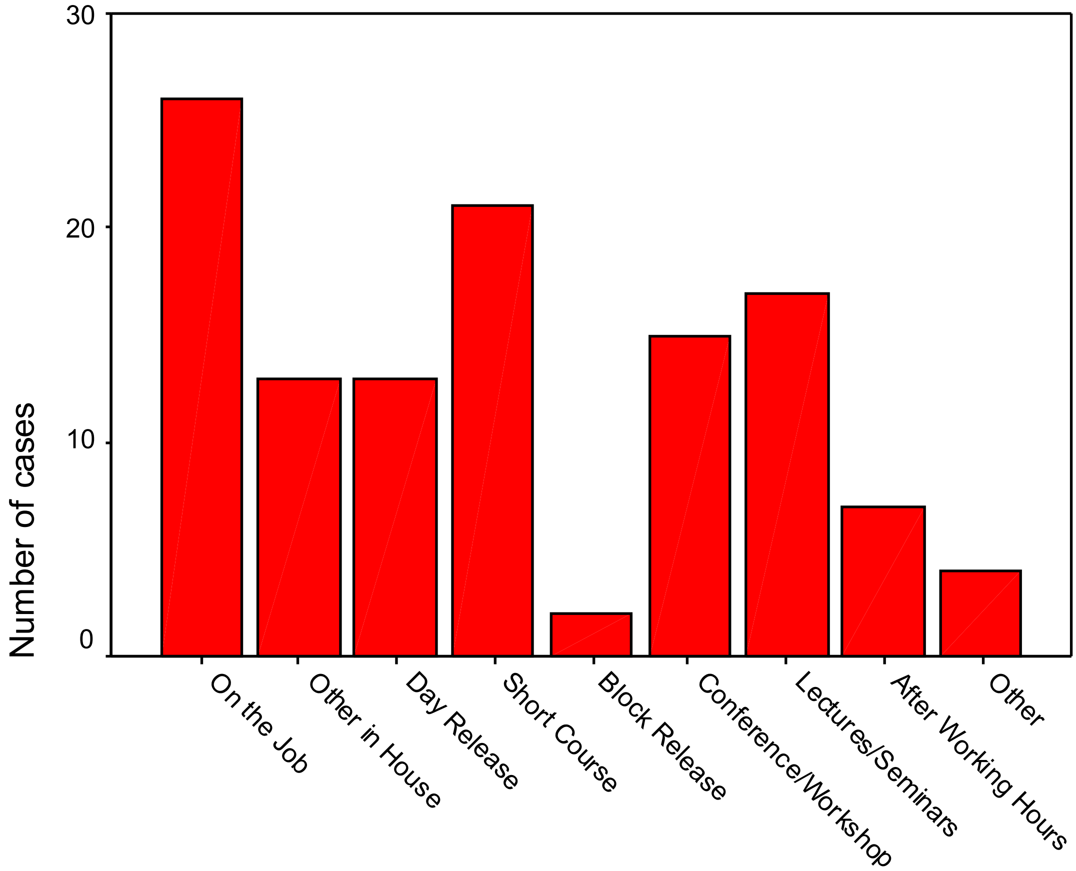
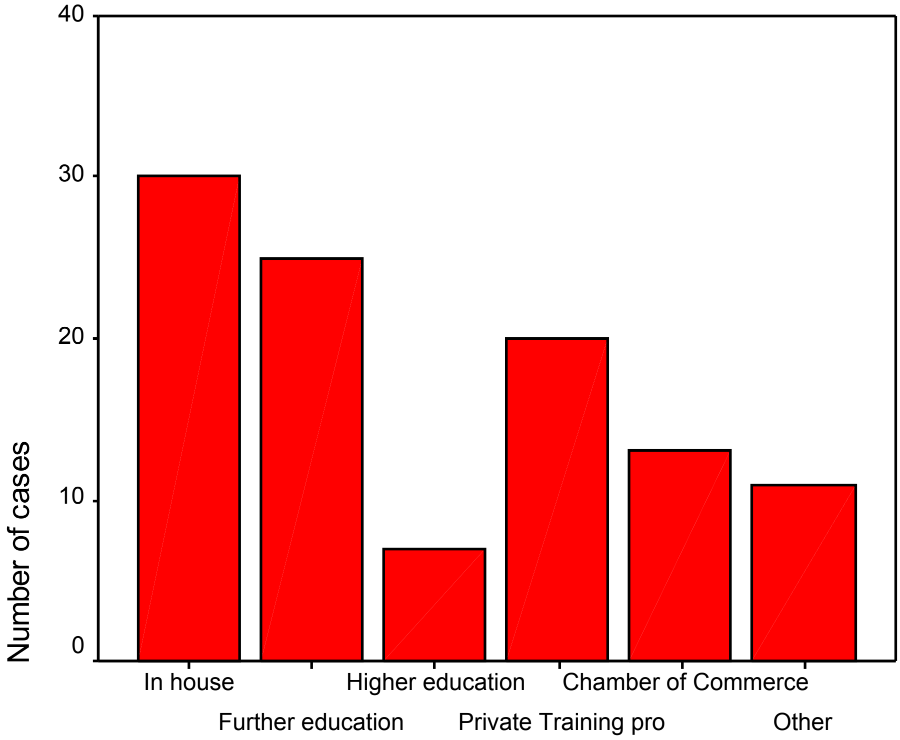


Table 14

If yes, how was the training delivered? **Number=204**	percentages
	2.2%
Other in house	4.3%
Day release	6.7%
Short course	8.9%
Block release	11.1%
Conference/workshop	13.4%
Lectures/seminars	15.6%
After working hours	17.8%
Other	20.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 16</u>: *Training* accessed by type of *provider*.

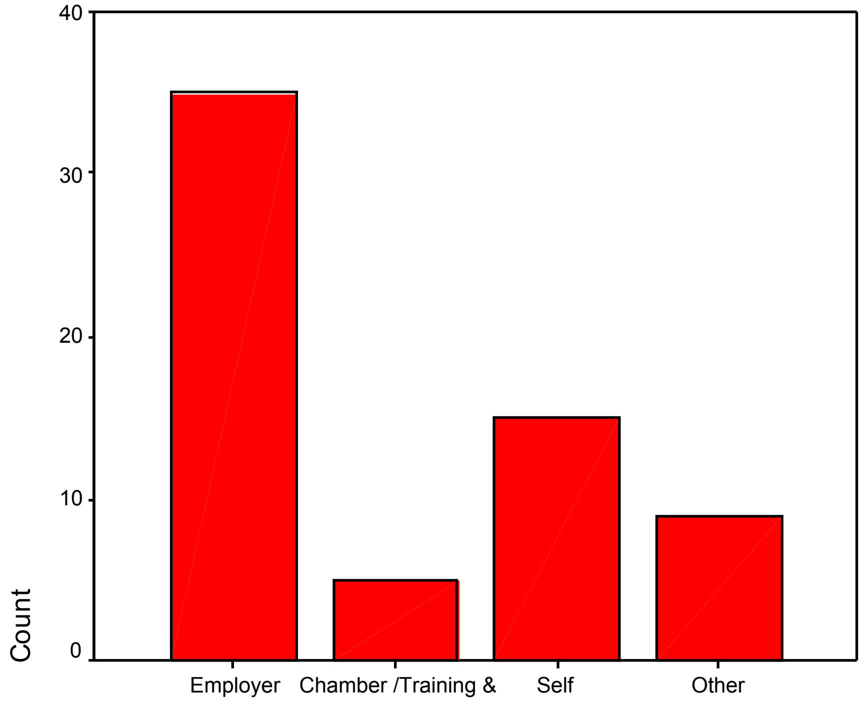


<u>Table 15</u>

Which of the following organisations have you used as training providers? **Number=204**	percentages
In house	23.6%
Further e	19.7%
igher education	5.5%
ng provider	15.7%
training & enterprise	10.2%
	8.7%
None	16.5%

Heaton,

Fig 17: *Payment* for training



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In the main, who paid for most of the training? Number=204	percentages
Employer	54.7%
Chamber/training & enterprise council	7.8%
Self	23.4%
Other	14.1%
None	16.5%

Fig18: *Satisfaction* with training received

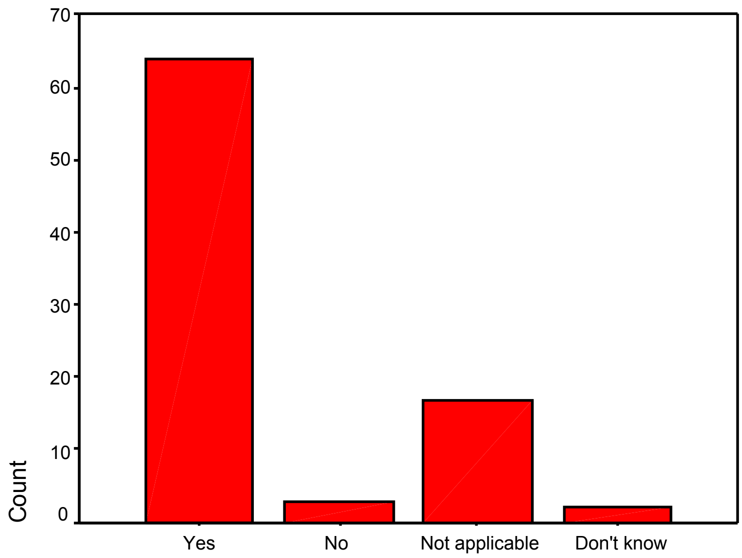

Table 17

Overall, was the training received appropriate for your needs? Number=204	percentages
es	74.4%
	3.5%
ot applicable	19.8%
	2.3%
Total	100.0%

A detailed analysis of the organisational profile, resources, Investment activities and development issues in the two regions.

This section is devoted to the organisational nature of the industry, resources and development matters.

The main design activities are smart and casual female fashion and bridal wear.

There are more self employed and sole proprietor type of enterprises in the designer fashion sector than the cultural industries in Yorkshire and the Humber (28.9%).[5]

Age and longevity seem to have similarities, as the period 1995 – 98 is significant to both the cultural industries as a whole and the designer fashion sector. Generally, the designer fashion sector has a larger number of smaller businesses then the cultural industries and fewer large businesses.

The supply chain has similarities with the cultural industries in Yorkshire and the Humber in that the designers (practioner in the cultural industries) represent 29%[6] of the chain whilst the designer is 43.8%.

There is a marked difference with manufacturing (8.3%)[7] in the cultural industries and (36.3%) designer fashion. Education is not a significant component of the chain; however, in the cultural industries in Yorkshire and the Humber it represents 14.8%[8].

The movement of total income has remained static in the cultural industries in Yorkshire and the Humber whilst designer fashion has risen in the two regions.

The designer fashion sector businesses in the two regions do not benefit from grants (93.9%), compared with the cultural industries in Yorkshire and the Humber (35%)[9].

The primary source of income in both the cultural industries and the designer fashion sector are sales of goods and services, however it is noticeable that rental /lease income and a second income are more important in the designer fashion than cultural industries.

Investment activity has focussed on marketing and product development in the designer fashion sector with IT, and the acquisition of plant and machinery of greater significance to the cultural industries in Yorkshire and the Humber.

The development issues are similar with the need to attract new customers (51.1%)[10] in the cultural industries in Yorkshire and the Humber and over 50% in designer fashion in the two regions.

Business support is not a significant factor for either sector, however those that have received found it helpful.

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[5] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p17 fig21

[6] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p21 fig25

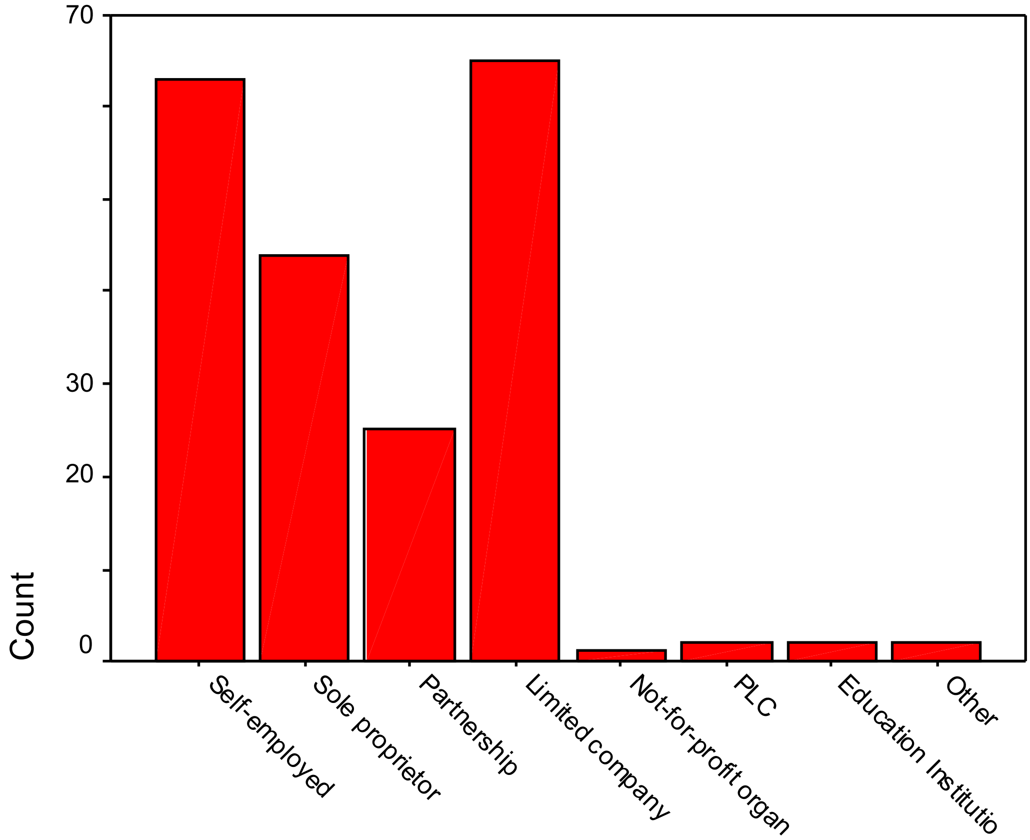
[7] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p21 fig25

[8] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p21 fig25

[9] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p27 fig36

[10] Vital Statistics the Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2000, p31Fig45

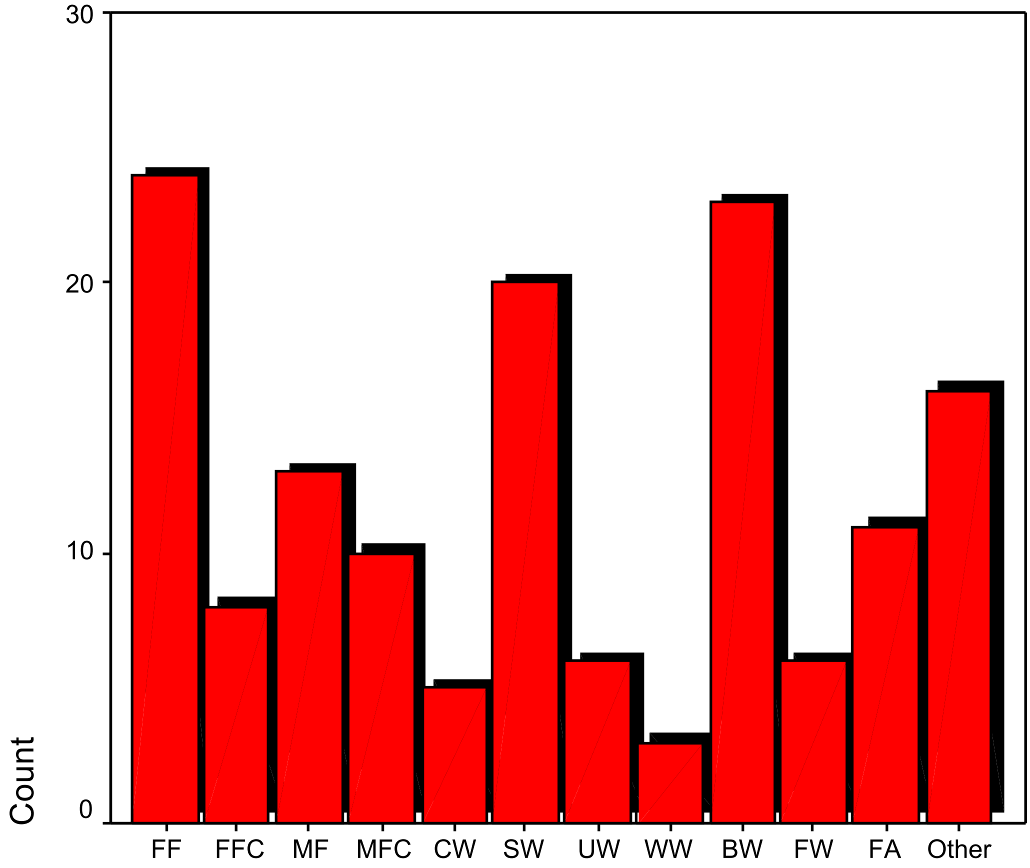
enterprise.



Which one of the following best describes you? Number=204	percentages
Self employed	30.9%
Sole proprietor	21.6%
Partnership	12.3%
Limited company	31.9%
Not for profit organisation	0.5%
PLC	1.0%
Educational institution	1.0%
Other	1.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 20: The *main design activities* in the *two regions* during the year ending 30th April 2001.



female fashion smart
female fashion casual

- MF= male fashion smart
- MFC= male fashion casual
- CW= childrens wear
- SW= sports wear
- UW= under wear
- WW= work wear
- BW= bridal wear
- FW= foot wear
- FA= fashion accessories
- OTHER= other

Source: Roodhouse & Heaton, 2001

Table 19

Which one of the following best describes your main activity across the two regions? Number=204	percentages
Female fashion smart	16.6%
Female fashion casual	5.5%
Male fashion smart	9.0%
Male fashion casual	6.9%
Childrenswear	3.4%
Sportswear	13.8%
Underwear	4.1%
Workwear	2.1%
Bridalwear	15.9%
Footwear	4.1%
Fashion accessories	7.6%
Other	11.0%
Total	100.0%

Source: Roodhouse and Heaton, 2001

<u>Fig 21:</u> The main *design activity* within the *North West* sector for the year ending 30th April 2001.

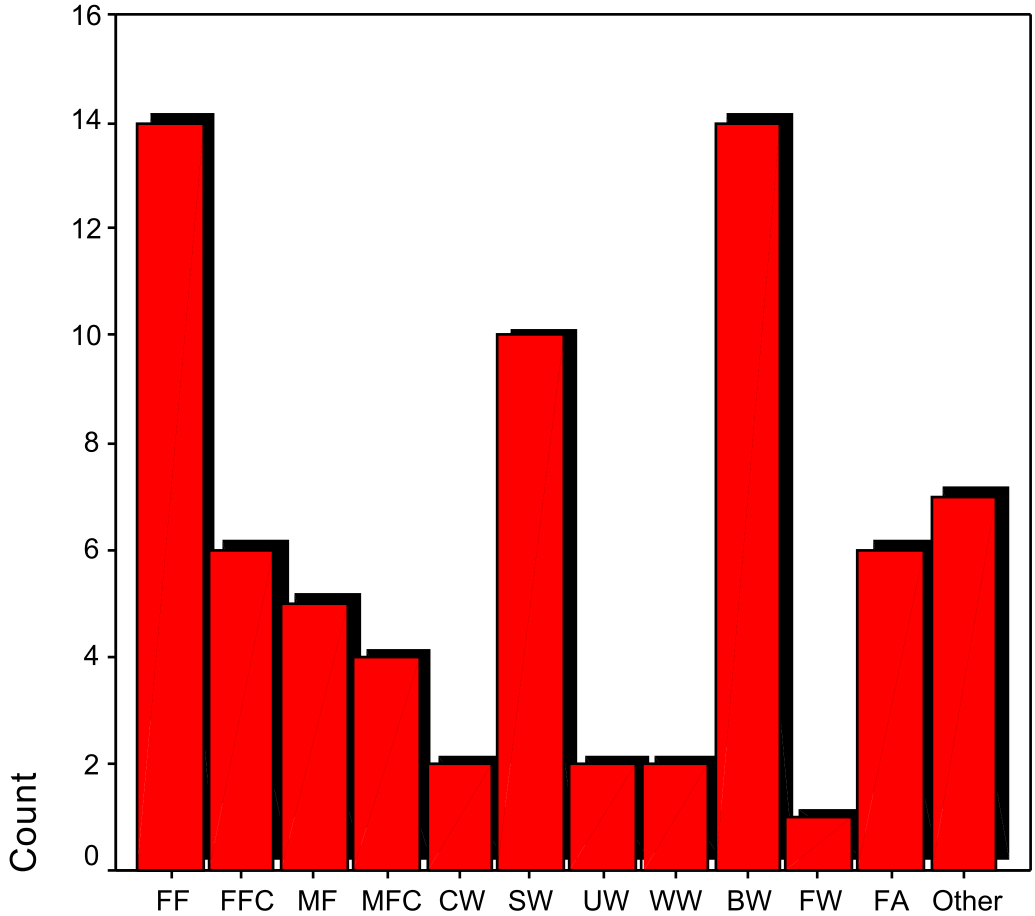
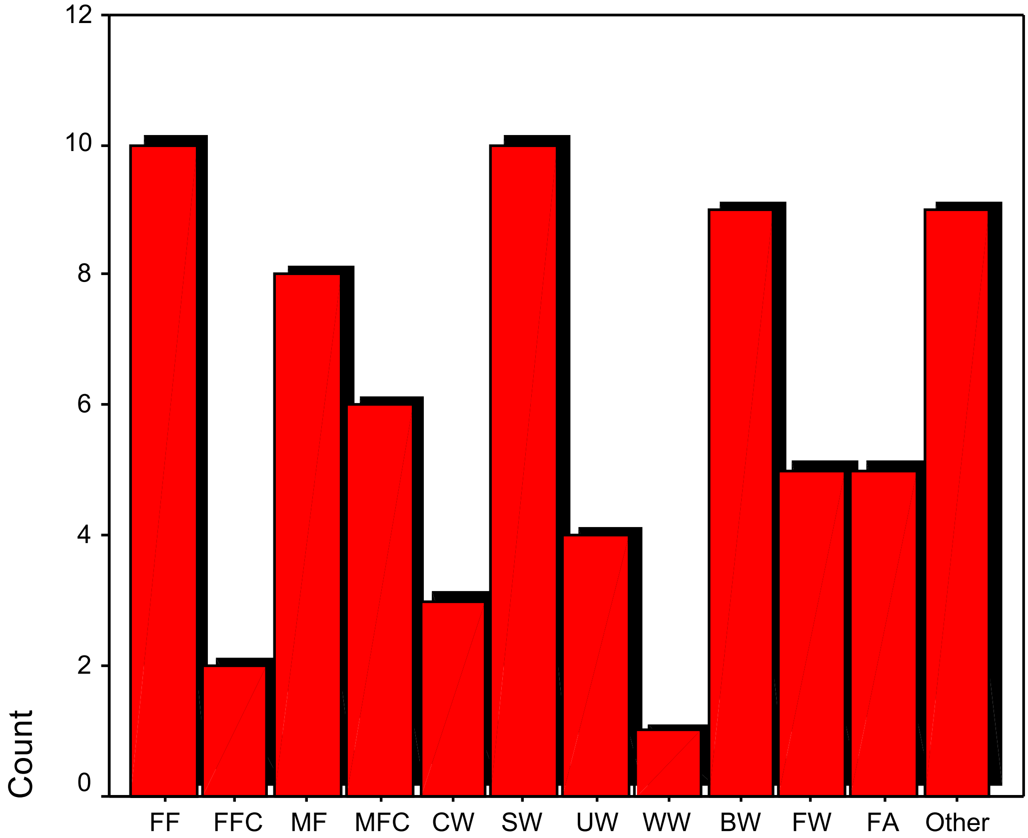


Table 20

Which one of the following best describes your main activity? Number=204	percentages
Female fashion smart	19.2%
Female fashion casual	8.2%
Male fashion smart	6.8%
Male fashion casual	5.5%
Childrenswear	2.7%
Sportswear	13.7%
Underwear	2.7%
Workwear	2.7%
Bridalwear	19.2%
Footwear	1.4%
Fashion accessories	8.2%
Other	9.6%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 22:</u> The *main design activities* carried out within *Yorkshire & Humberside* during the year ending 30th April 2001.



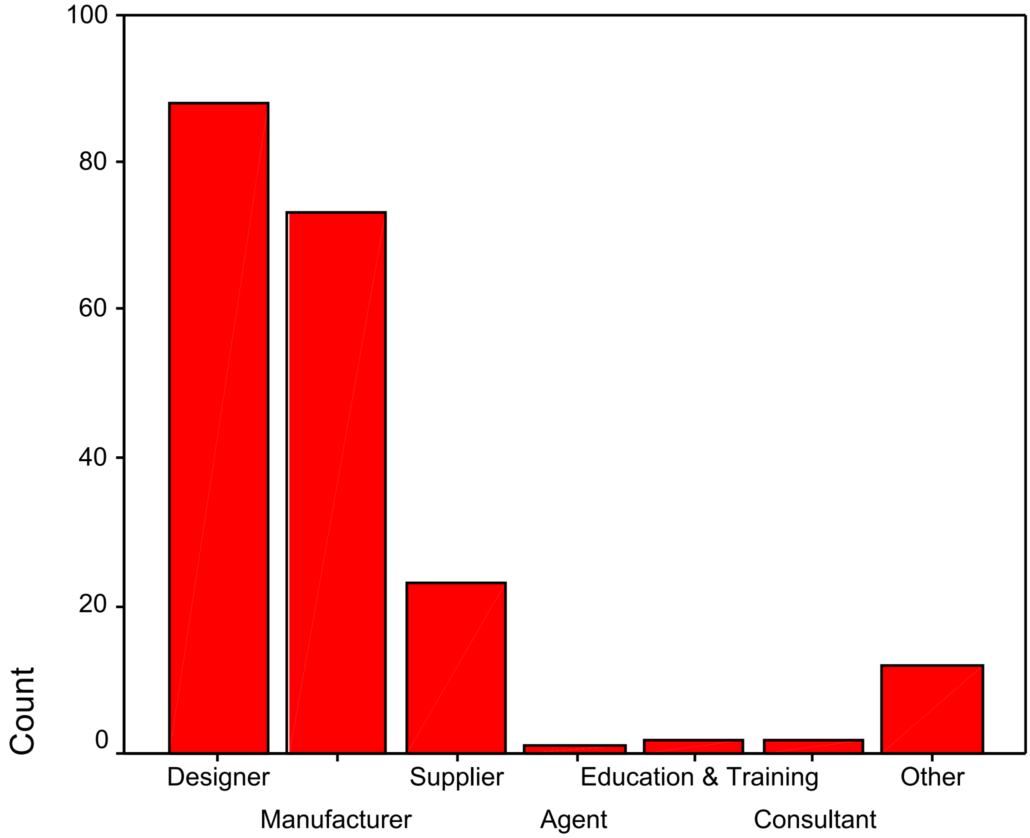
Source: Roodhouse & Heaton, 2001

Table 21:

Which one of the following best describes your main activity within Yorkshire & Humberside? Number=204	percentages
Female fashion smart	13.9%
Female fashion casual	2.8%
Male fashion smart	11.1%
Male fashion casual	8.3%
Childrenswear	4.2%
Sportswear	13.9%
Underwear	5.6%
Workwear	1.4%
Bridalwear	12.5%
Footwear	6.9%
Fashion accessories	6.9%
Other	12.5%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 23</u>: *Supply chain positions* in the two regions for the year ending 30th April 2001.



<u>Table 22</u>

Which one of the following best describes you & your work? Number=204	percentages
Designer	43.8%
Manufacturer	36.3%
Supplier	11.4%
Agent	0.5%
Education & training provider	1.0%
Consultant	1.0%
Other	6.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

g 24: *Supply chain* positions in the *North West* for the year ending 30th April 2001.

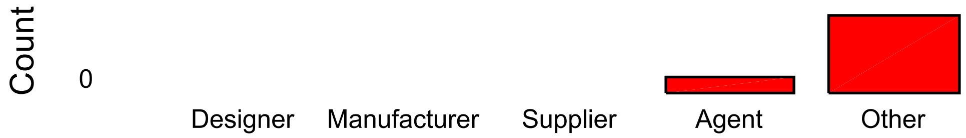
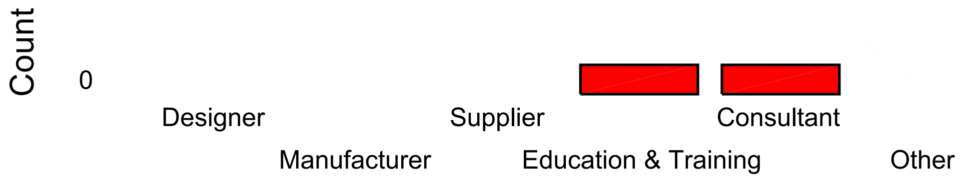


Table 23

Which one of the following best describes you & your work within the Northwest? N	percentages
	48.1%
anufacturer	32.7%
	12.5%
Agent	1.0%
Consultant	
Other	5.8%
Total	100.0%

<u>Fig 25:</u> *Supply chain* positions in *Yorkshire & Humberside* for the year ending 30th April 2001.



<u>Table 24</u>

Which one of the following best describes you & your w sectors? Number=204	percentages
Designer	39.2%
Manufacturer	40.2%
Supplier	10.3%
Consultant	2.1%
Education & training provider	2.1%
Other	6.2%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 26: *Supply chain* positions in the two regions *without manufacturing* for the year ending 30th April 2001.

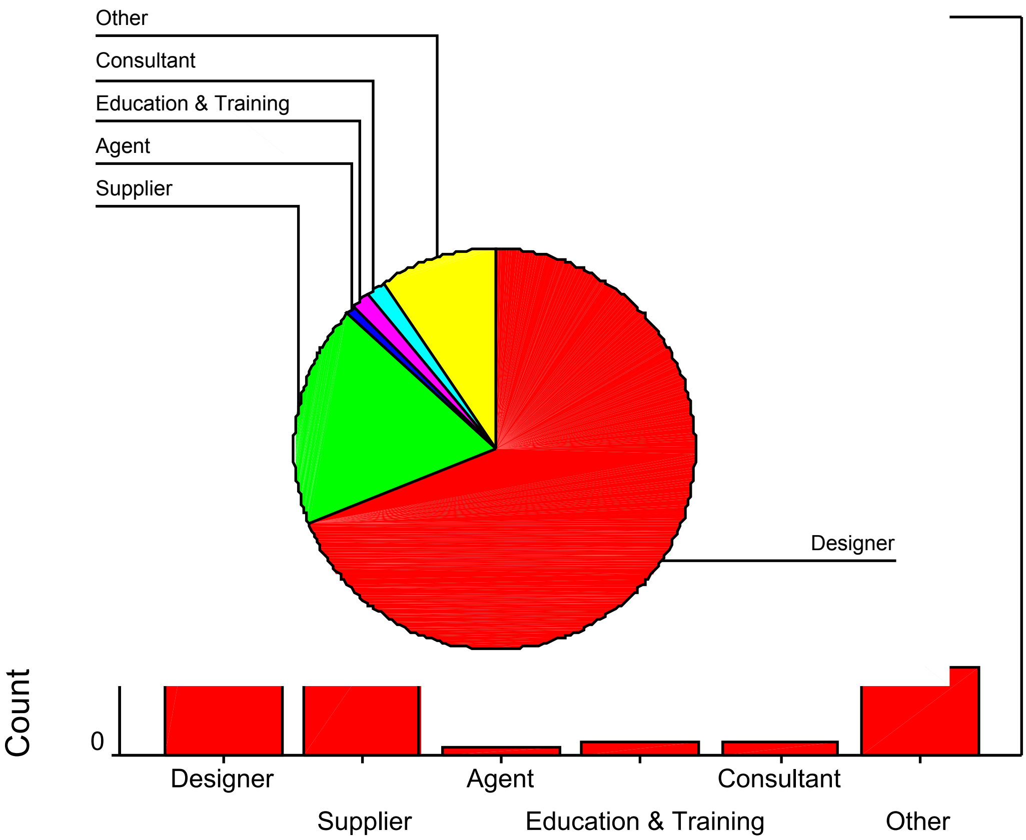


Table 25

Which one of the following best des & your work without manufacturing? Number=204	percentages
	68.8%
Supplier	18.0%
Agent	0.8%
Education & training provider	1.6%
Consultant	1.6%
Other	9.4%
Total	100.0%

Source: Roodhouse & Heaton, 2001

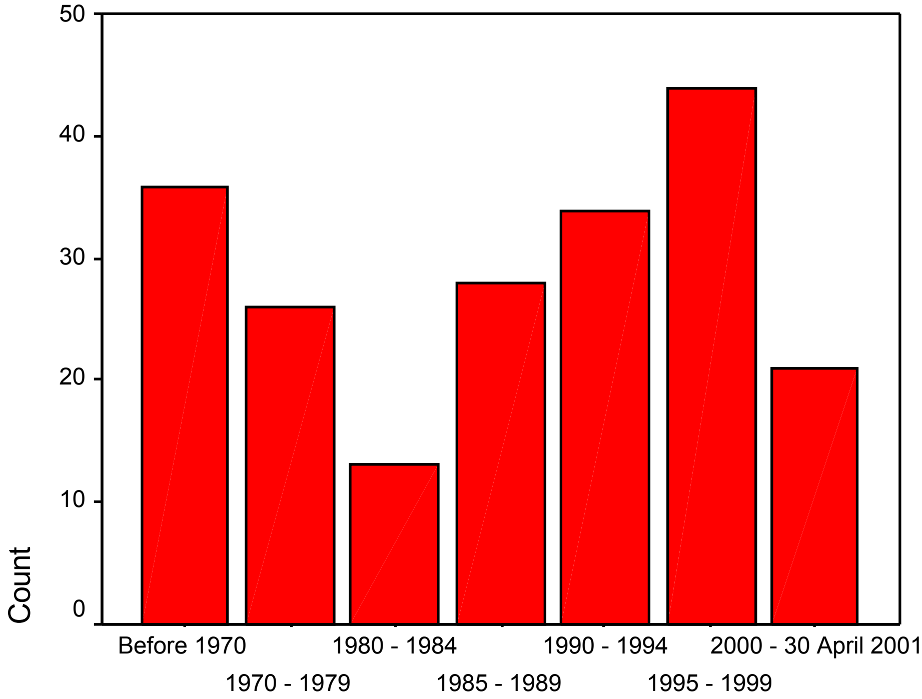


Table 26

In what year did you begin carrying out your current main activity? Number=204	percentages
	17.8%
970 – 1979	12.9%
	6.4%
985 – 1989	13.9%
	16.8%
1995 – 1999	21.8%
2000 – 30th April 2001	10.4%
Total	100.0%

Fig 28: *Annual income* profile for the tw o regions during the year ending 30th April 2001.

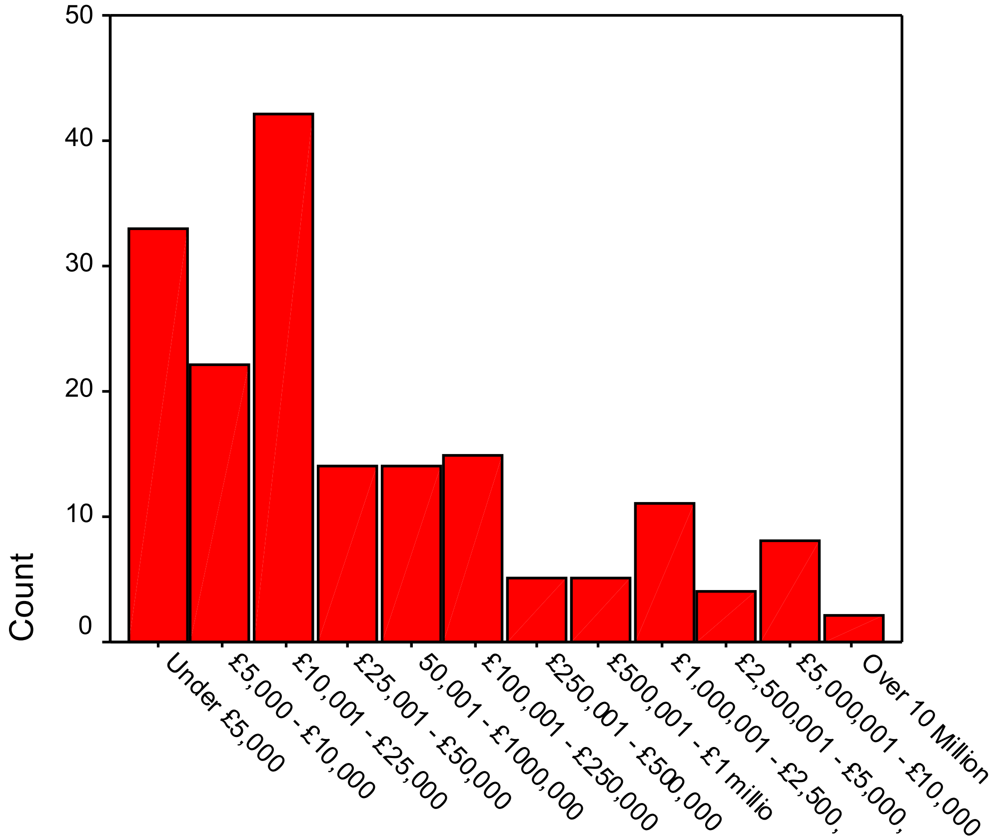


Table 27

What was your approximate me for the year ending 30th April 2001? Number=204	percentages
	18.9%
£5,000 - £10,000	12.6%
£10,001 – £25,000	24.0%
£25,001 - £50,000	8.0%
50,001 - £100,000	8.0%
£100,001 - £250,000	2.9%
£50,001 - £1 million	2.9%
£1,000,001 -£2,500,00	6.3%
£2,500,001 -£10,000,000	4.6%
Over 10 million	1.1%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 29: *Annual income* profiles in the *North West* sector for the year ending 30th April 2001.

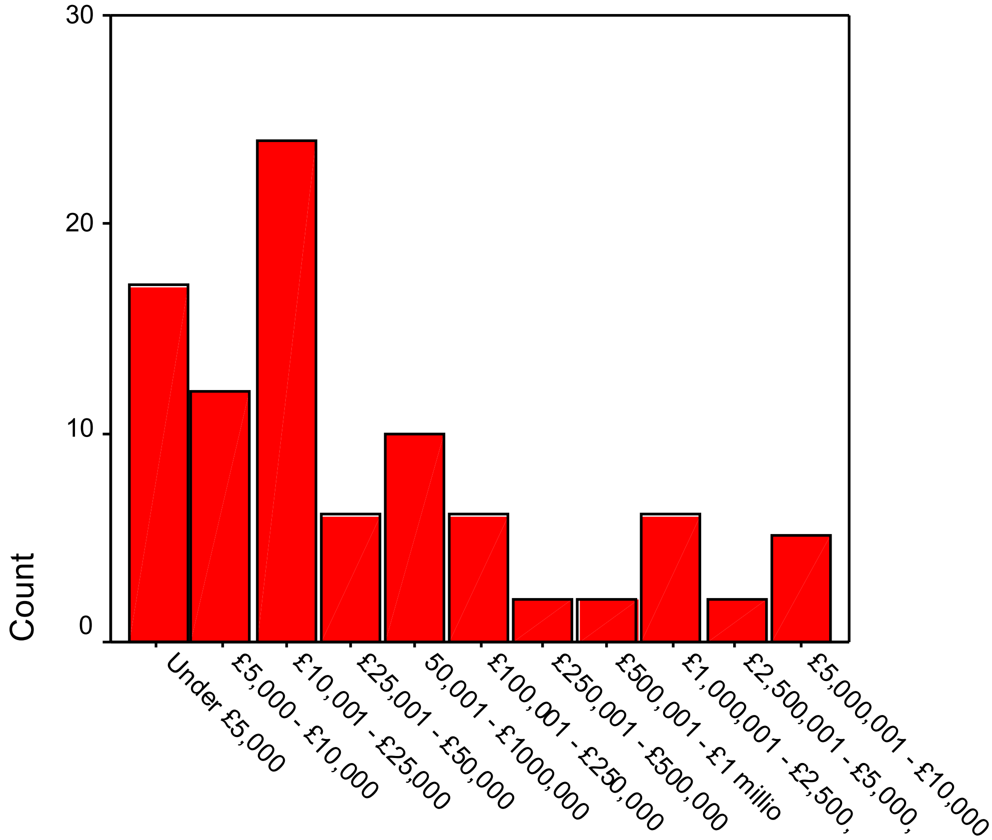


Table 28

What was your approximate annual income within the N 30th April 2001?	percentages
_ nder £5,000	18.5%
	13.0%
£10,001 – £25,000	26.1%
£25,001 - £50,000	6.5%
50,001 - £100,000	10.9%
£100,001 - £250,000	6.5%
£50,001 - £1 million	2.2%
£1,000,001 -£2,500,00	2.2%
£2,500,001 -£10,000,000	6.5%
Over 10 million	2.2%
Total	100. 0%

Source: Roodhouse & Heaton, 2001

Fig 30: *Annual income* profiles within *Yorkshire & Humberside* sectors for the year ending 30th April 2001.

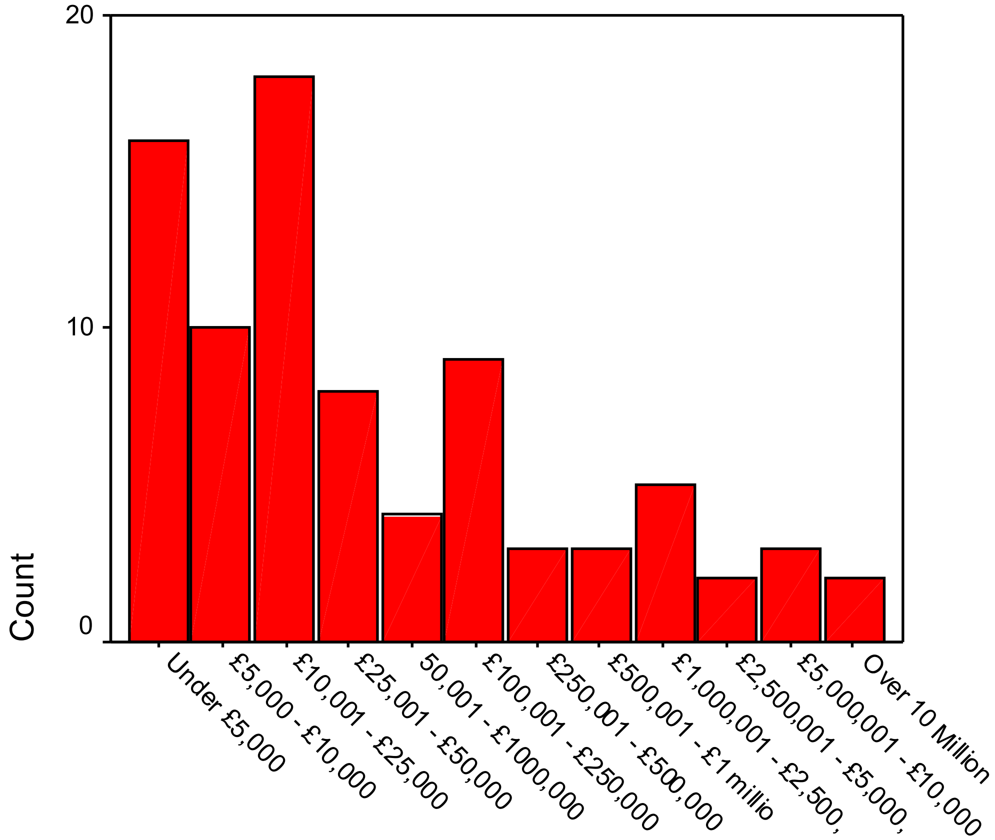


Table: 29

What was your approximate annual income across Yorkshire & Humberside for the year ending 30th April 2001? Number=204	percentages
nder £5,000	19.3%
	12.05
£10,001 – £25,000	21.7%
£25,001 - £50,000	9.6%
50,001 - £100,000	4.8%
£100,001 - £250,000	10.8%
£50,001 - £1 million	3.6%
£1,000,001 -£2,500,00	2.4%
£2,500,001 -£10,000,000	3.6%
Over 10 million	2.4%
Total	100. 0%

Source: Roodhouse & Heaton, 2001

Fig 31: Movement of *total income* over the year ending 30^{th} April 2001.

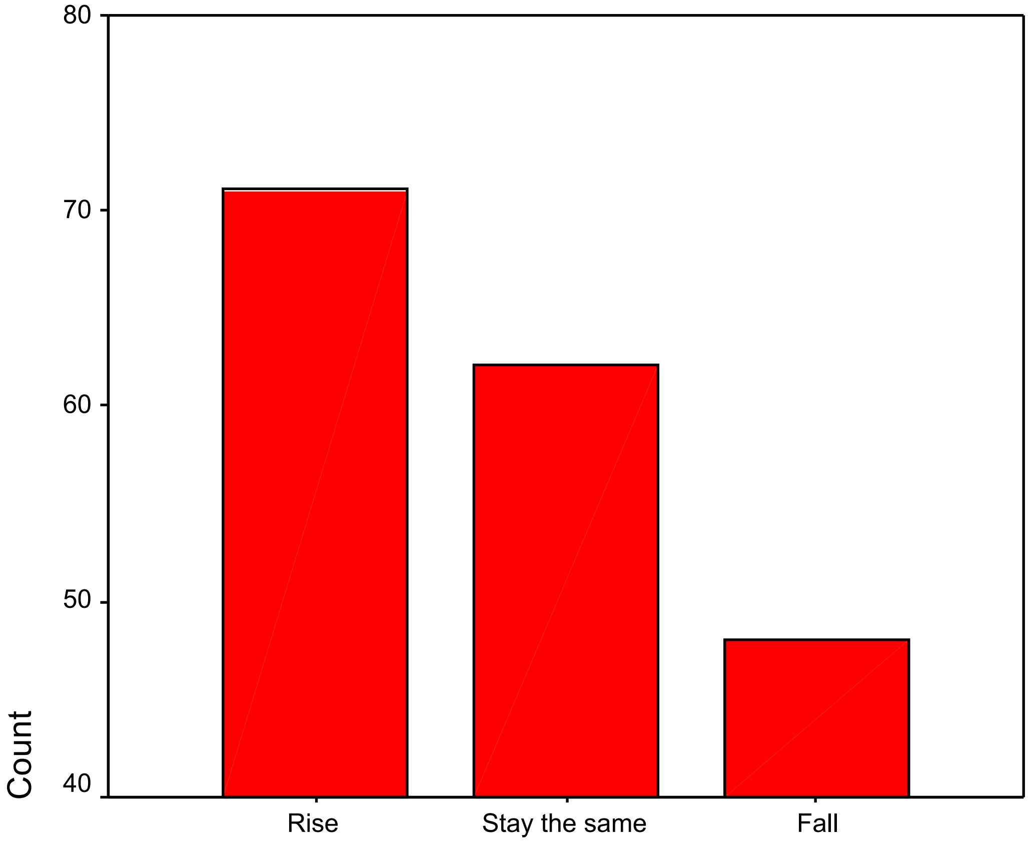


Table: 30

Did r the year ending 30^{th} April 2001? Number=204	percentages
	39.25
Stay the same	34.4%
Fall	26.55
Total	100.0%

Fig 32: Grant recipients in the two regions

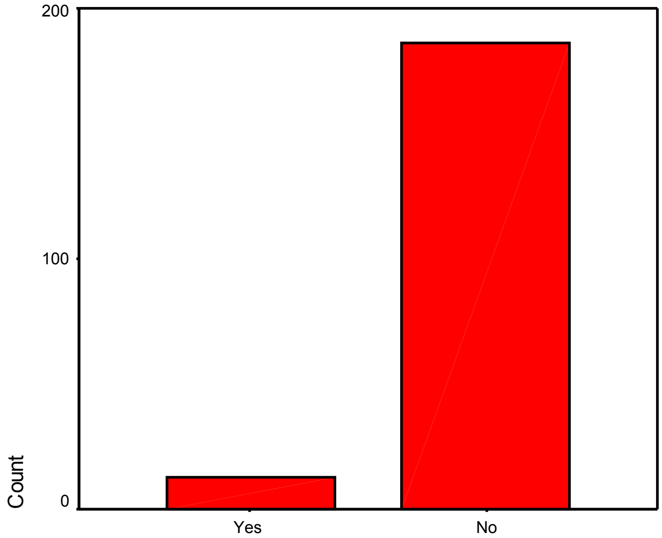


Table 31

Did you receive any grant income (core & project funding) across both regions in the year ending 30th April 2001? Number=204	percentages
Yes	6.1%
No	93.9%
Total	100.0%

Table 32

Did you receive any grant income (core & project funding) within the North west in the year ending 30th April 2001? Number=204	percentages
es	5.9%
	94.1
otal	100.0%

Table 33

Did you receive any grant income (core & project funding) Yorkshire & Humberside in the year ending 30 April 2001? Number=204	percentages
Yes	6.3%
No	93.8%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 33: *Sources* of grant support.

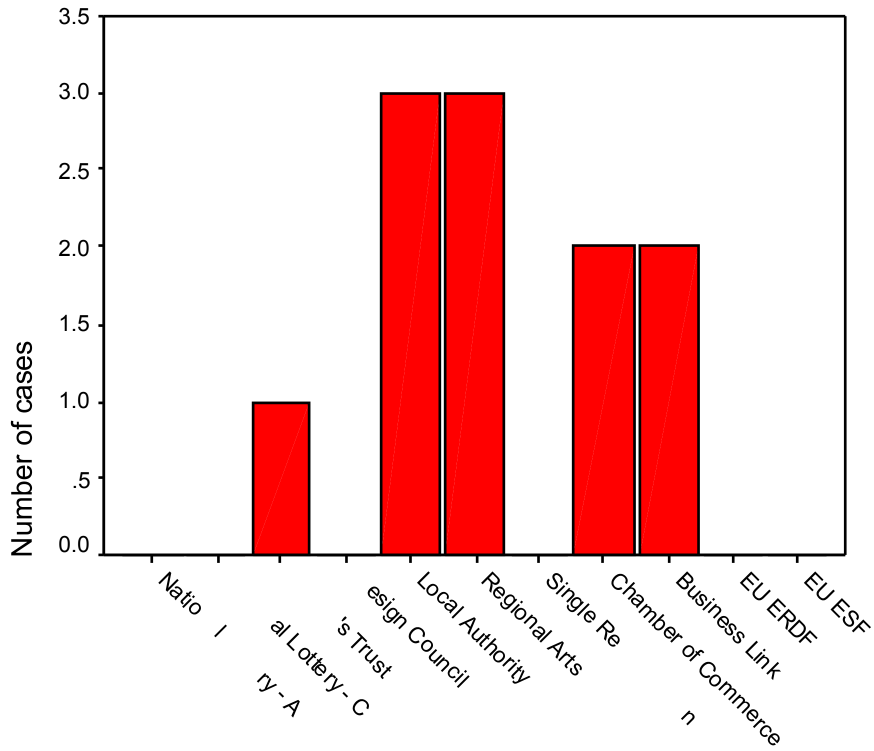


Table 34

If yes, whic s have you received this grant income? Number=204	percentages
	9.1%
Local authority	27.35
Regional arts board	27.3%
Chamber of commerce	18.2%
Bu	18.2%
Tot	100.0%

So 2001

Fig 34: *Sponsorship received* by employer during the year ending 30th April 2001.

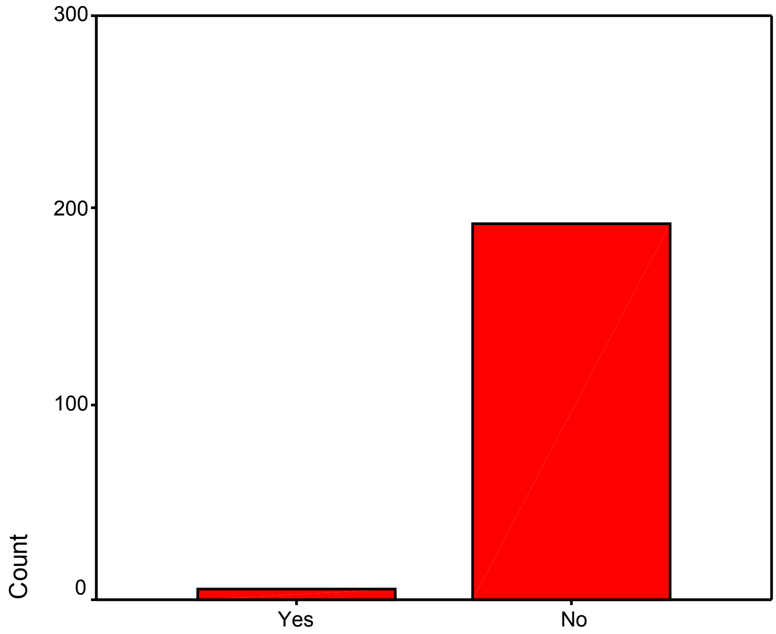


Table 35

Have you received financial sponsorship from anyone in the year ending 30th April 2001? Number=204	
Yes	2.5%
No	97.5%
Total	100.0%

Fig 36: Numbers of employers that *received services in kind* during the year ending 30th April 2001.

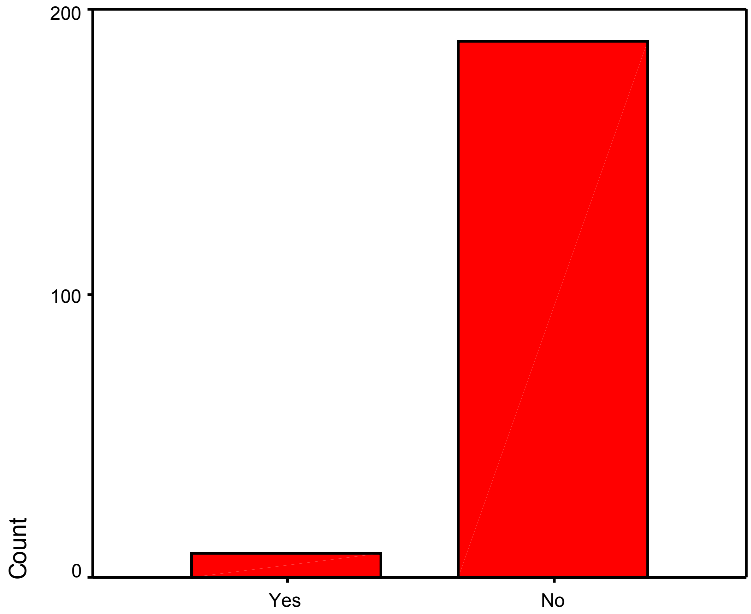


Table 36

Have you received services in kind from anyone in the year Number=204	percentages
Yes	4.5%
No	95.5%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 37: The *providers* of services in kind.

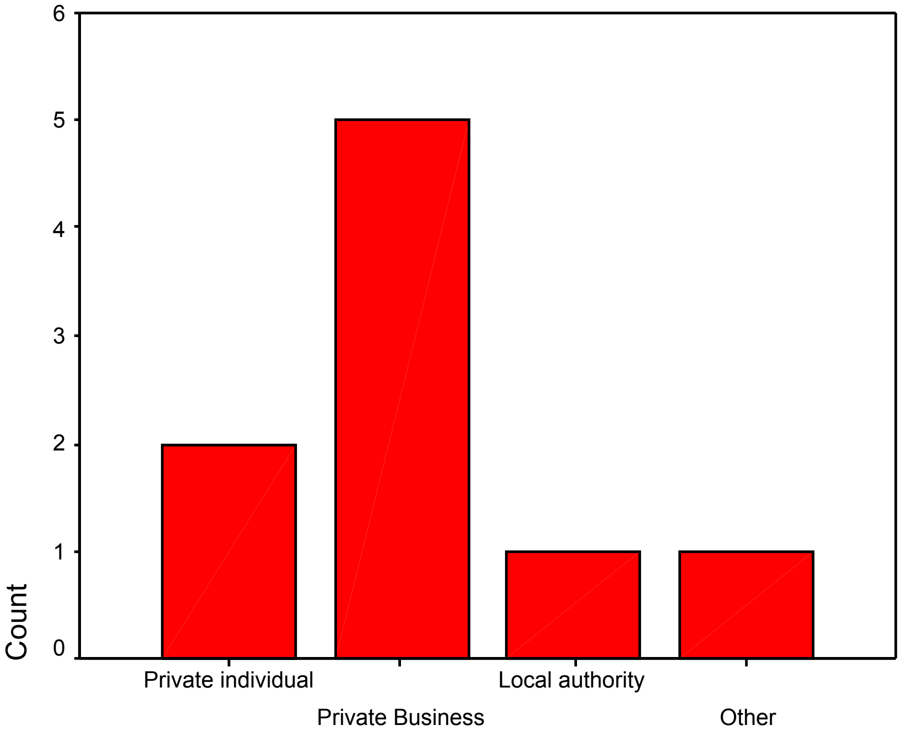
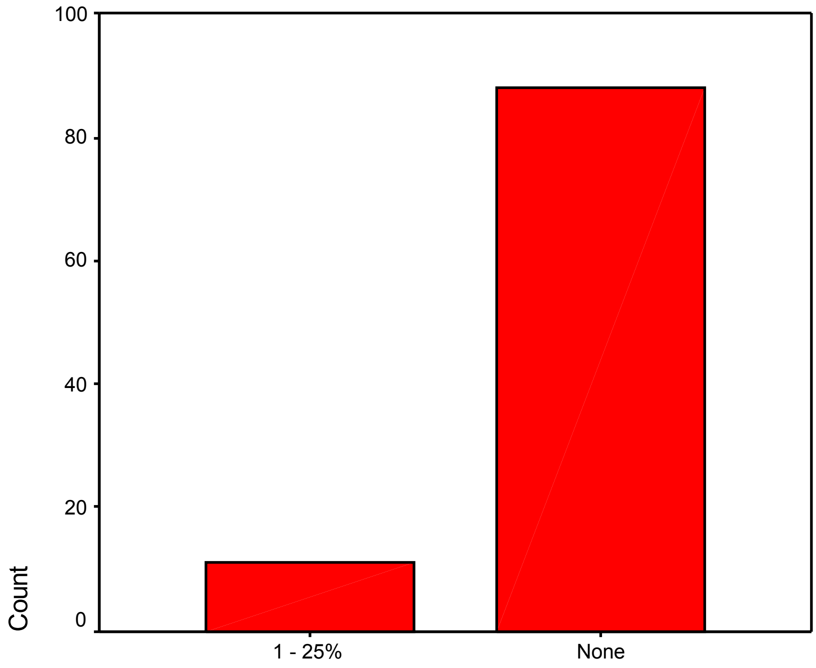


Table 37

If yes, please state who provided them **Number=204**	percentages
P	22.2%
Priv	55.6%
ocal authority	11.1%
	11.1%
	100.0%

: Roodhouse & Heaton, 2001

<u>Fig 38:</u> Percentage of total *incomes derived from grants*.



<u>Table 38</u>

In the year ending 30th April 2001, approximately what percentage of your total income was derived from grants? Number=204	ages
1 – 25%	11.1%
None	88.9%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 39: The pattern of grant incomes during the year ending 30th April 2001.

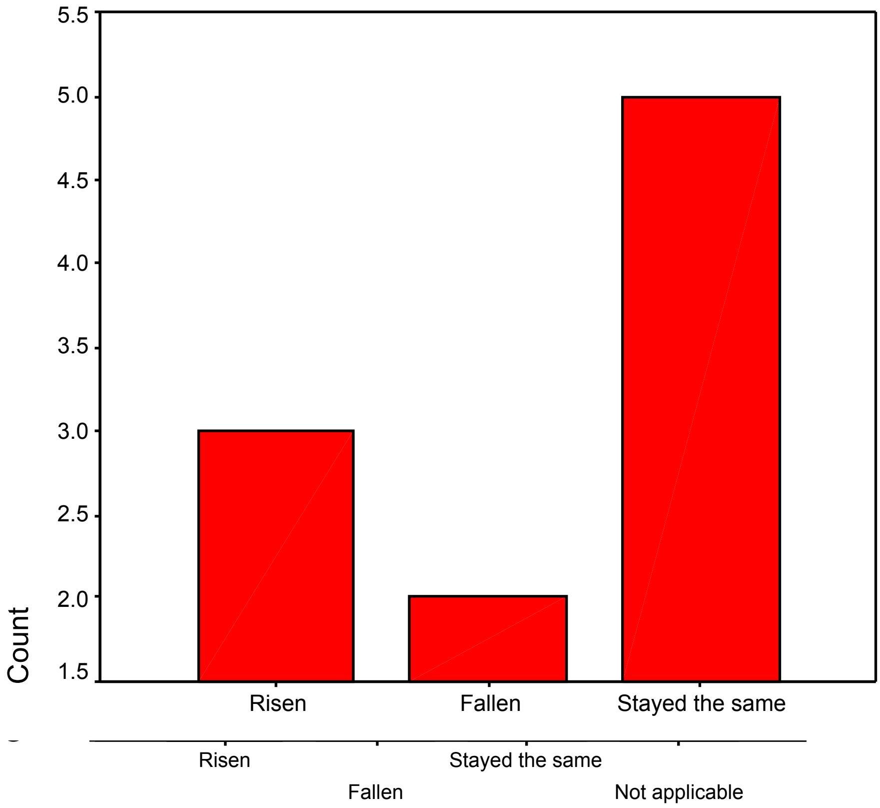


Table 39

Has your total grant income ri e ove l 2 the prev onths? Number=204	percentages
Risen	3.4%
Fallen	2.3%
Stayed the same	5.7%
Not applicable	88.5%
	100.0%

Source: Roodhouse & Heaton, 2001

Fig 40: Grant income variations during the year ending 30th April 2001.

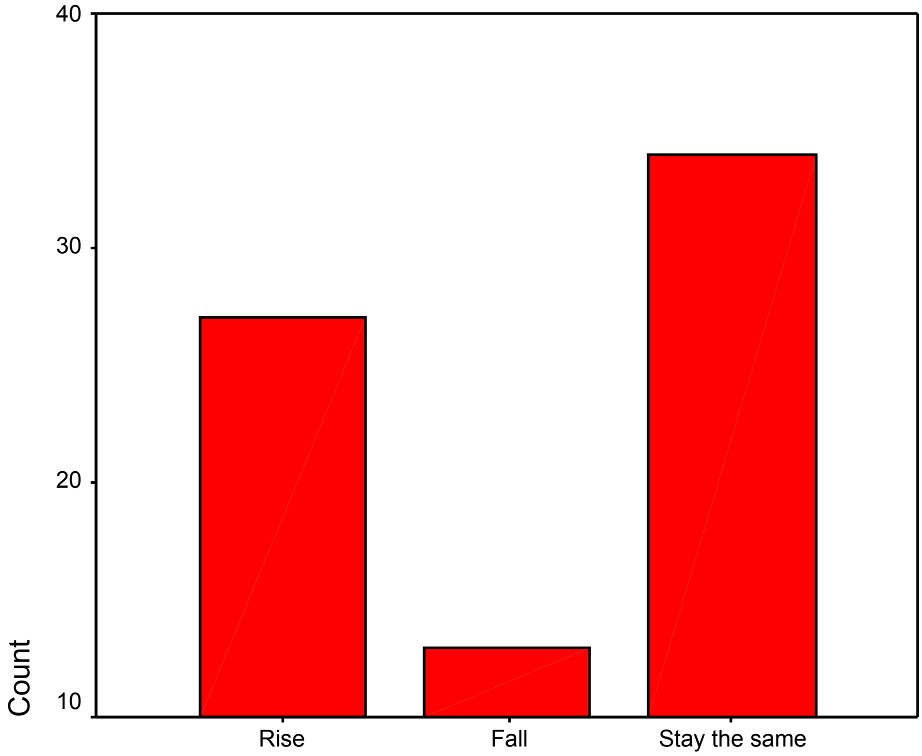


Table: 40

Did the total income from these other sources rise, fall or stay the same in the year ending 30th April 2001,?	percentages
R	16.6%
Fa	8.0%
me	20.9%
le	54.6%
	100.0%

S Heaton, 2001

Fig 41: *Other types of income* during the year ending 30th April 2001.

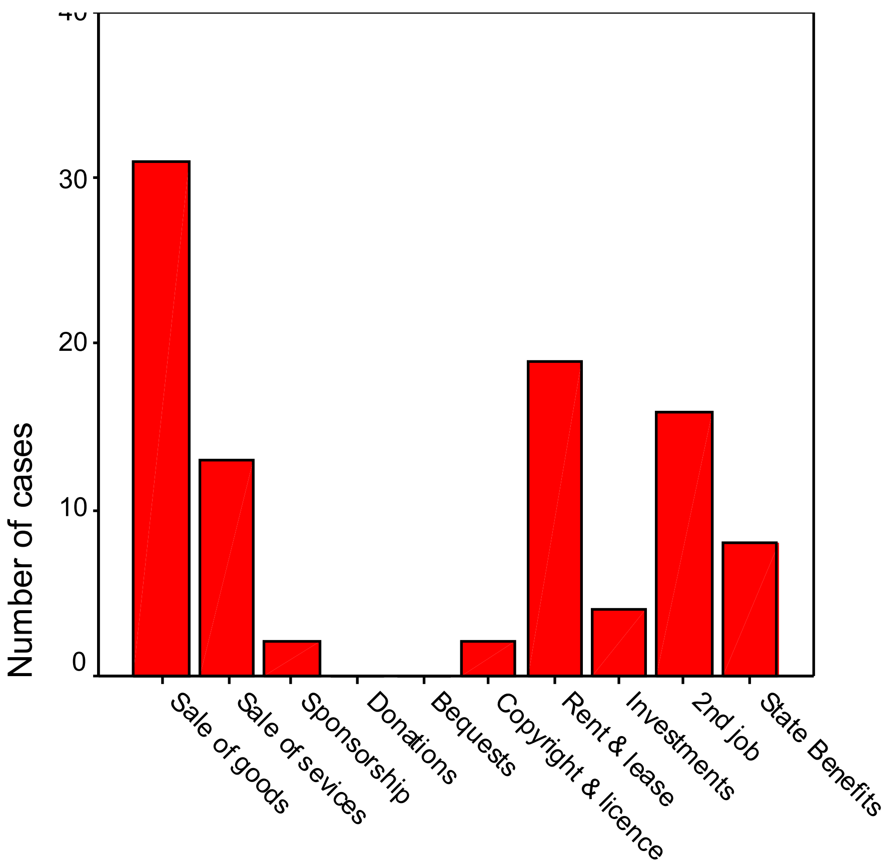


Table 41

Apart from carrying out your main activities, what other sources of income have been available to you in the year ending 30th April 2001? Number=204	percentages
Sale of goods	32.6%
S	13.7%
Sp	2.1%
opyright & licence fees	2.1%
income	20.0%
	4.2%
Second job	16.8%
State benefits	8.4%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig: 42 *Current problems* experienced by employers.

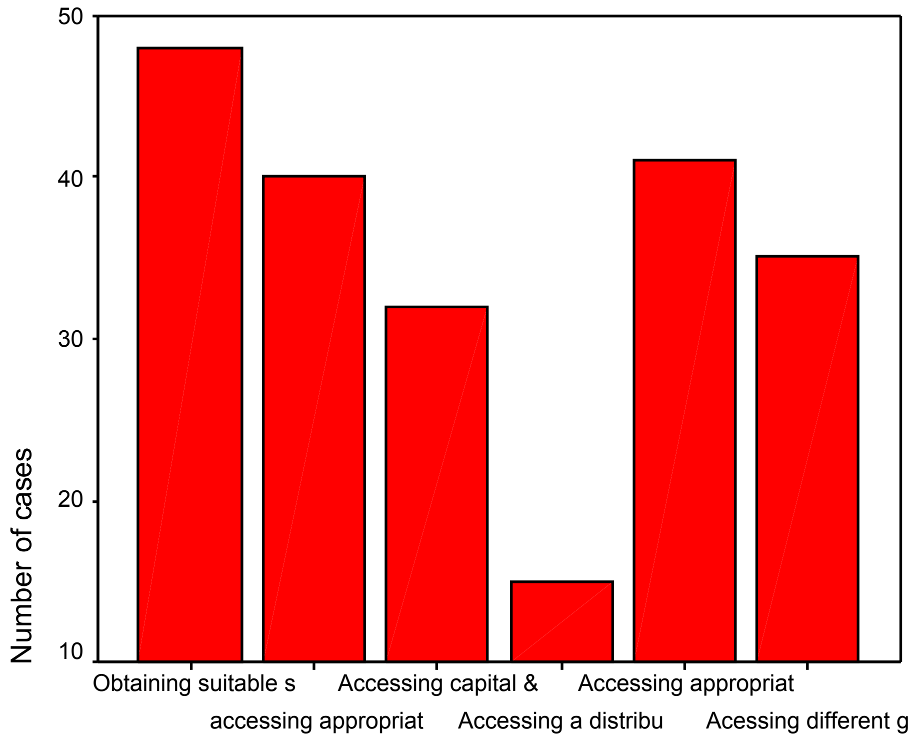
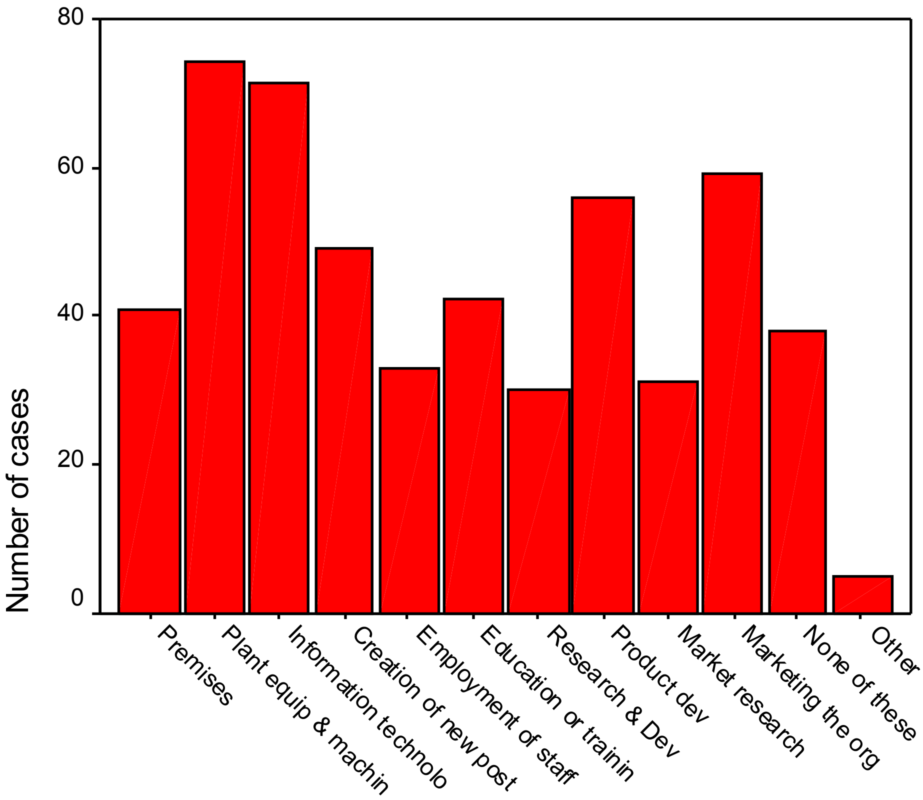


Table 42

Are you currently experiencing any of the following problems? Number=204	percentages
	22.7%
A raw	19.0%
equipment	15.2%
network	7.1%
Accessing appropriate outlets	19.4%
Accessing different geographical markets	16.6%
Total	100.0%

se & Heaton, 200

<u>Fig 43:</u> *Investment priorities* during the year ending 30th April 2001.

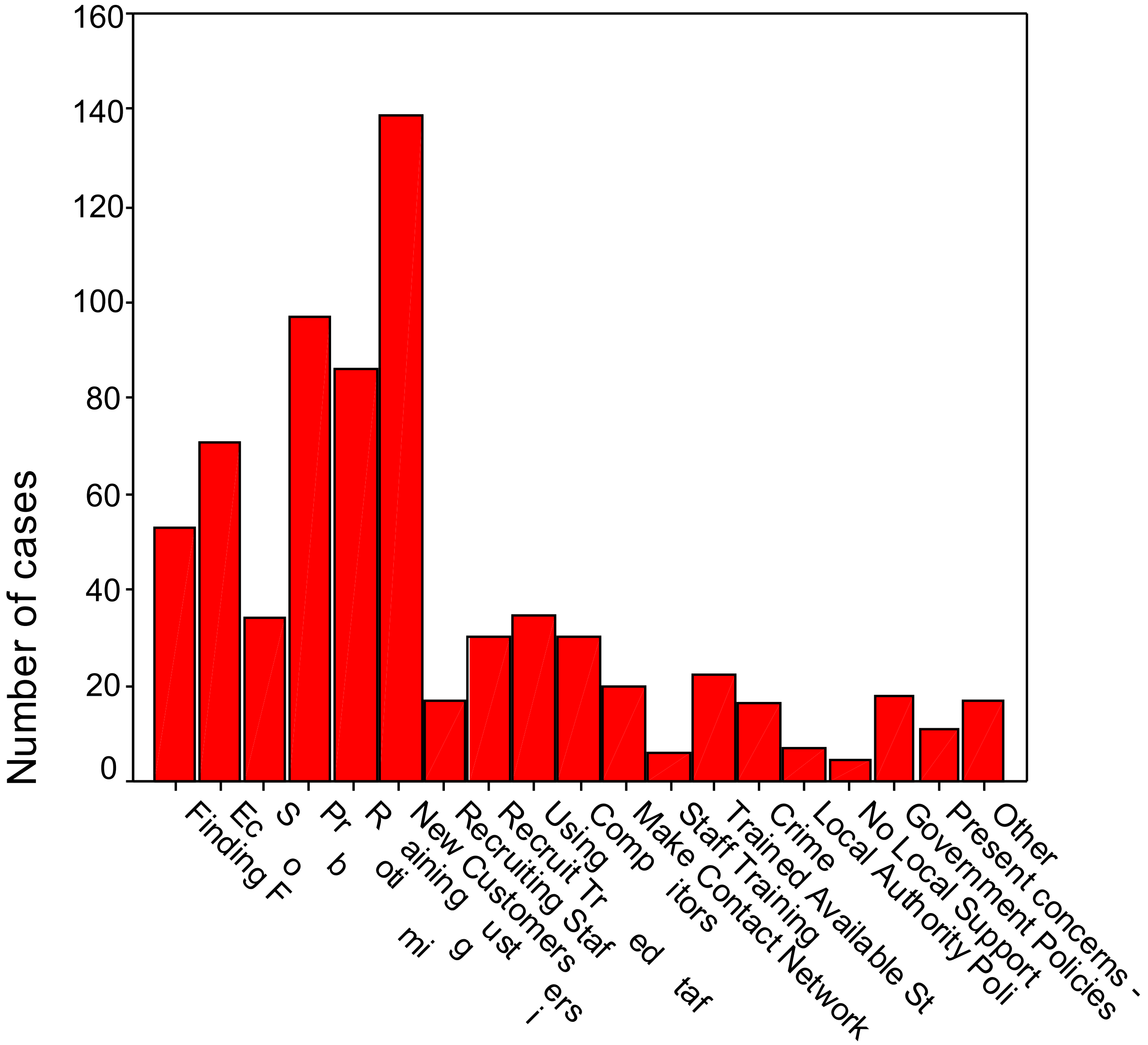


<u>Table 43</u>

Have you financially invested in any of the following in the year ending 30 April 2001? Number=204	percentages
	7.8%
machinery	14.0%
	13.4%
Creation of new posts	9.3%
	7.9%
Research & development	5.7%
	10.6%
Market research	5.9%
	11.2%
None of these	7.2%
	0.9%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 44: Development issues.



Source: Roodhouse & Heaton, 2001

Fig 45 : Organisations used to *provide business support*.

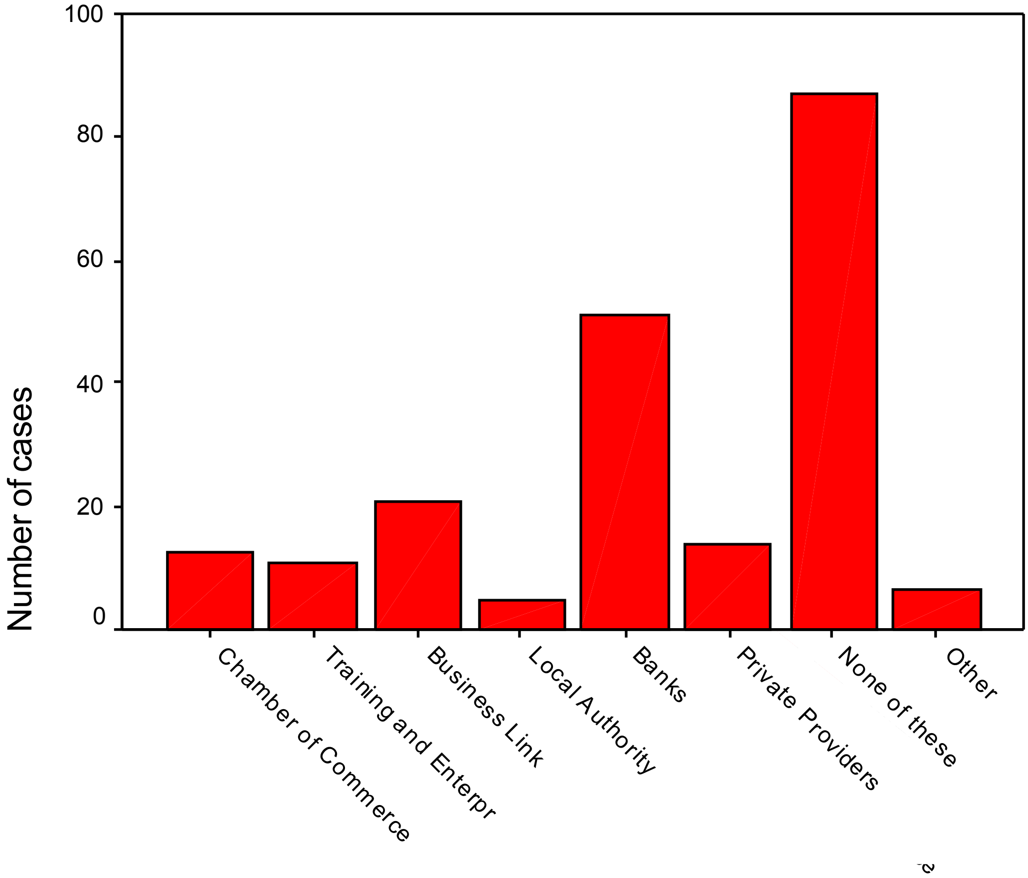


Table 44

Which of the following organisations have you used as business support providers? Number=204	percentages
Chamber of commerce training & enterprise	6.2%
Training & enterprise council	5.3%
Business link	10.0%
Local authority	2.4%
Banks	24.4%
Private providers	6.7%
None of these	41.6%
Other	3.3%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 46: business support *recipient satisfaction*.

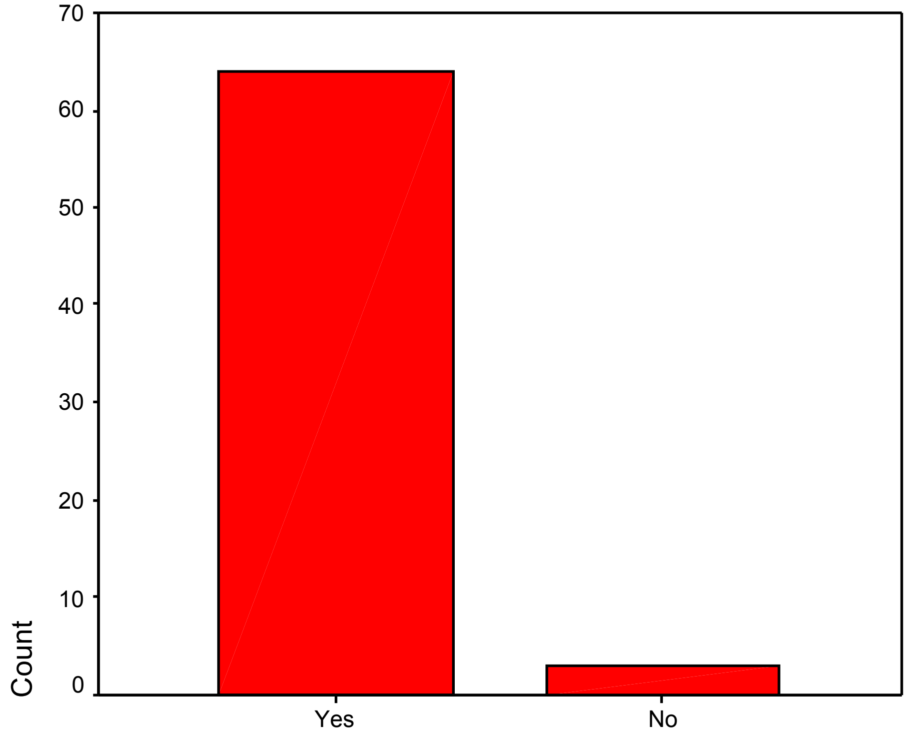


Table: 45

Overall was the organis rt receiv for your needs? **Number=204**	percentages
Yes	95.5%
No	4.5%
Total	100.0%

S eaton, 2

The detailed analysis of the geography and markets in the regions

The most noticeable feature of designer fashion in the two regions is the lack of clustering and the single location of businesses. For those who do cluster the greatest value is in sharing information (25.45%) and acquiring new customers (19.7%). This is also the case for each region.

This is also the case for the cultural industries in Yorkshire and the Humber (57.4%)[11] although there is a greater interest in clustering generally.

Similarly the most popular type of premises preferred by designer fashion businesses (49.5%), leased, mirror the requirements of the cultural industries in Yorkshire and the Humber (38.7%)[12].

There are a significant proportion of home workers (19.75%) however in the cultural industries as a whole in Yorkshire and the Humber there is a greater interest in working from home (24.9%).[13]

The geographical market dependence for the sector in the two regions is the United Kingdom (51.3%) with a strong regional market. However the international dimension is small (7.6%) and generally reflects the trend for the cultural industries as a whole (1.0%)[14]. This pattern is replicated in each region.

Single site operation is dominant in designer fashion for the two regions (83.2%), which corresponds with nearly three quarters of the cultural industries operating from a single site in Yorkshire and the Humber.

It is also the case that the majority of enterprises are located in the two regions, which suggests that there, are few multi locational businesses.

It seems that in this sector local enterprises are penetrating regional and national markets.

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[11] Vital Statistics The Cultural Industries in Yorkshire and the Humber, Bretton Hall, 2001, p21 fig27

[12] Vital Statistics The Cultural Industries in Yorkshire and the Humber Bretton hall 2001, p23 fig29

[13] Vital Statistics The Cultural Industries in Yorkshire and the Humber, Bretton Hall 2001, p23 fig29

[14] Vital Statistics The Cultural Industries in Yorkshire and the Humber Bretton hall 2001, p23 fig30

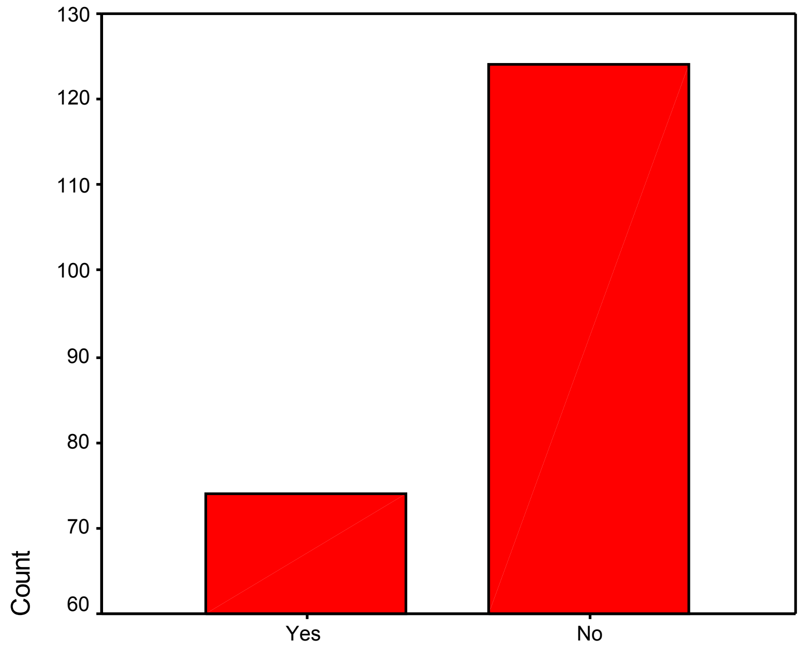


Table 46

Is your business located to others of a similar kind? Number=204	percentages
Yes	37.7%
No	62.6%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 48: *Benefits derived from clustering* within the North West.

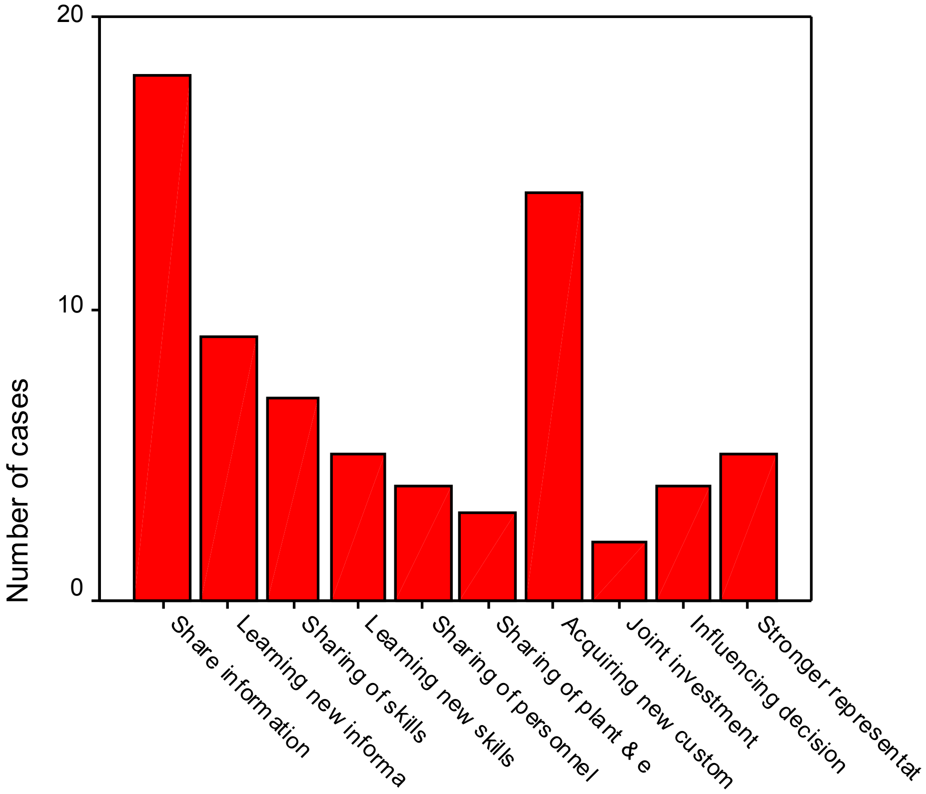


Table 47

Based on your experience, have you derived any of the following benefits from this location? Number=204	
Share information	25.45
Learning new info	12.7%
Sharing of skills	9.9%
earning new skills	7.0%
Sharing of personnel	5.6%
Acquiring new custom	19.7%
Joint investment	2.8%
Influencing decision	5.6%
Stronger representation	7.0%

Source: Roodhouse & Heaton, 2001

Fig 49: Benefits derived from clustering within Yorkshire & Humberside.

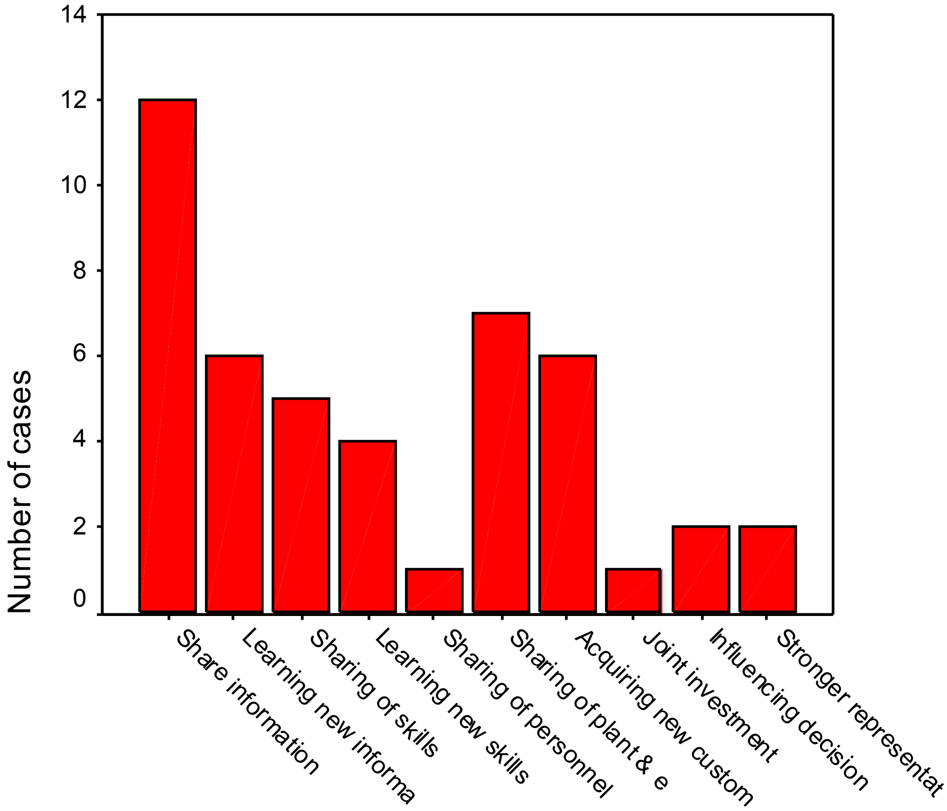


Table 48

Based on your experience, have you derived any of the following benefits from this location? Number=204	percentages
Share information	26.1
Le	13.0%
Sh	10.9%
Le ls	8.7%
Sh ing of personnel	2.2%
Ac stom	15.2%
Jo t investment	13.0%
Inf	2.2%
Str n	4.3%
Le	4.3%
Sh	100.0%

Fig 50: Types of premises.

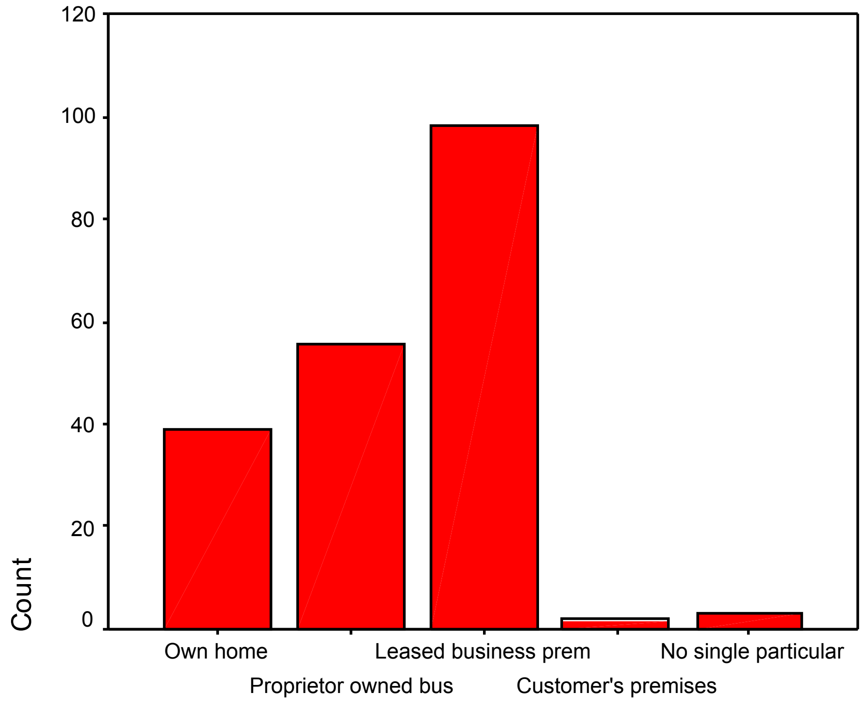


Table 49

Which of the following types of premises serves as your main business location Number=204	percentages
Own h	19.75
Propri s premise	28.35
Lease s	49.5%
Custo	1.0%
No sin n	1.55
Total	100.0%

Sourc 001

Fig 51: *Geographical market dependence* for the two regions.

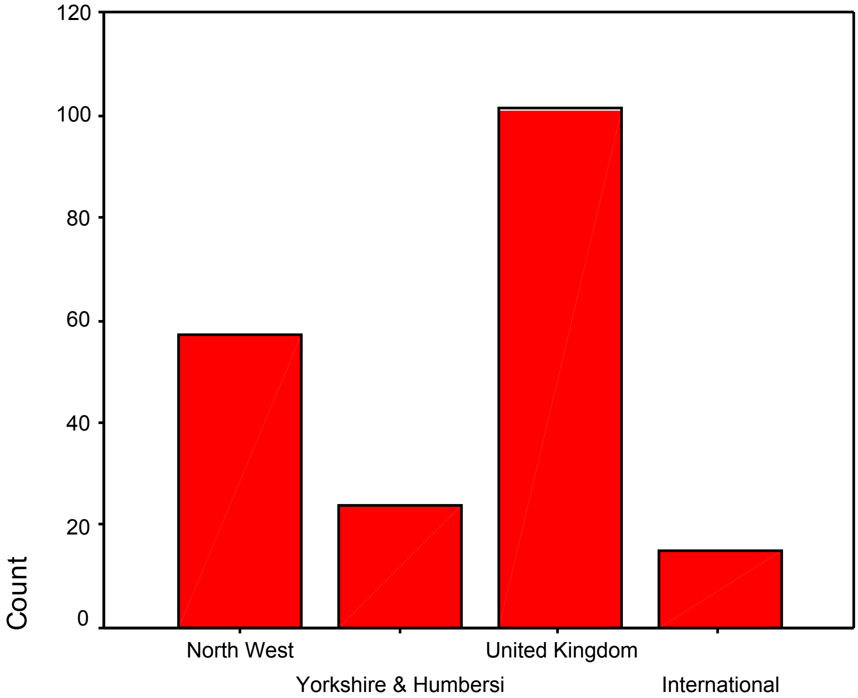


Table 50

Which area accounts for the majority of your customers? Number=204	per
Northwest	28.95
ire & Humberside	12.2%
United Kingdom	51.3%
ational	7.6%
Total	100.0%

Fig 52: *Geographical* market dependence in the *North West* sector.

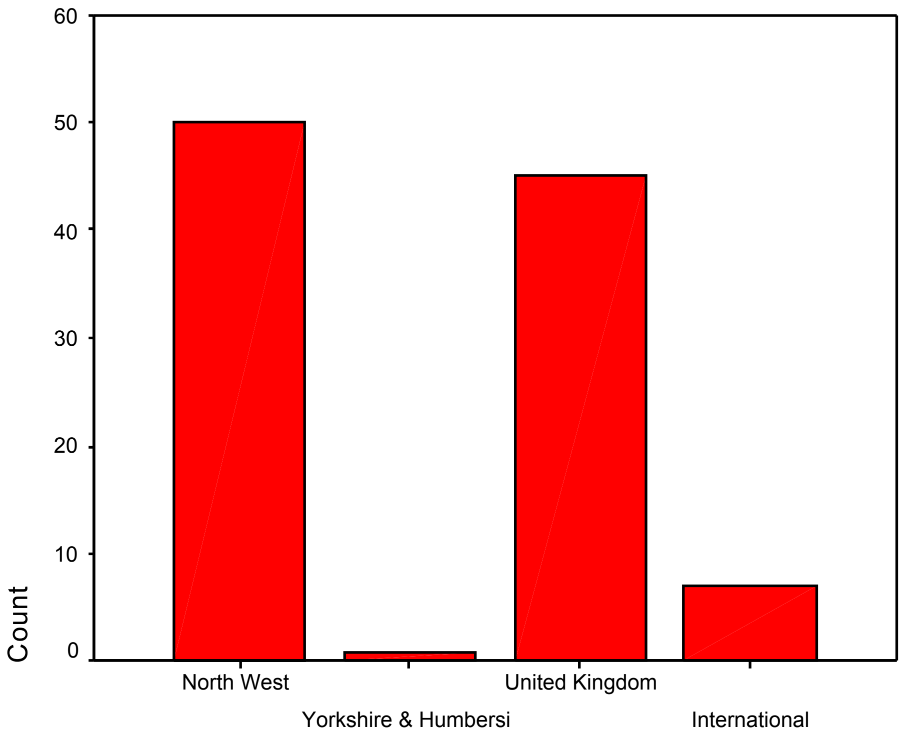


Table 51

Which area accounts for the majority of your customers? **Number=204**	percentages
Northwest	48.5%
Yorkshire & Humberside	1.0%
United Kingdom	43.7%
International	6.8%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 53: *Geographical* market dependence w ithin *Yorkshire & Humberside* sectors.

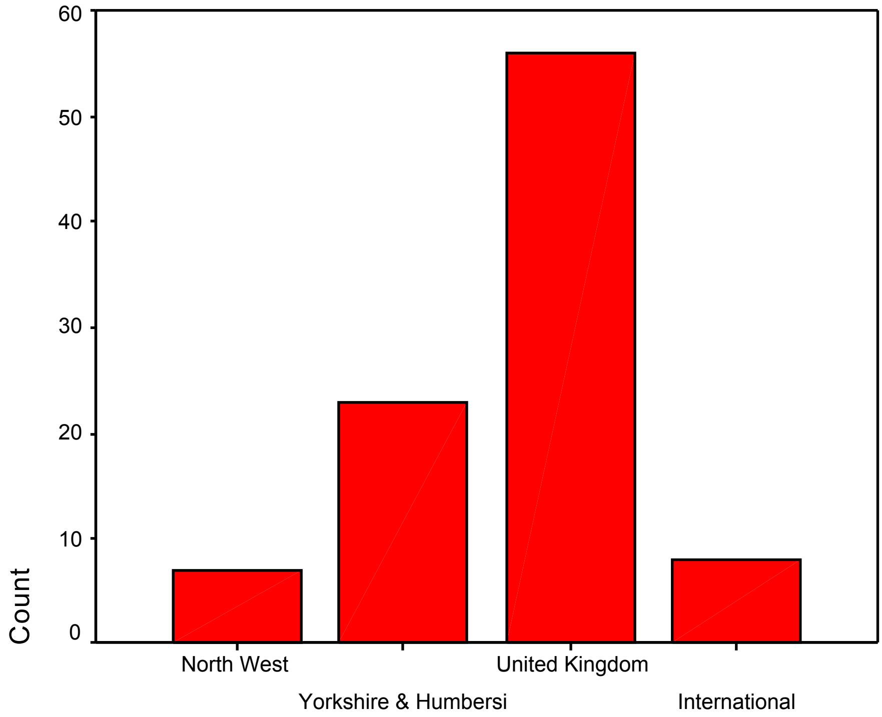


Table 52

Which area accounts for the majority of your customers? N	percentages
	7.4%
orkshire & Humberside	24.5%
	59.6%
International	8.5%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 54: Number of sites across the two regions.

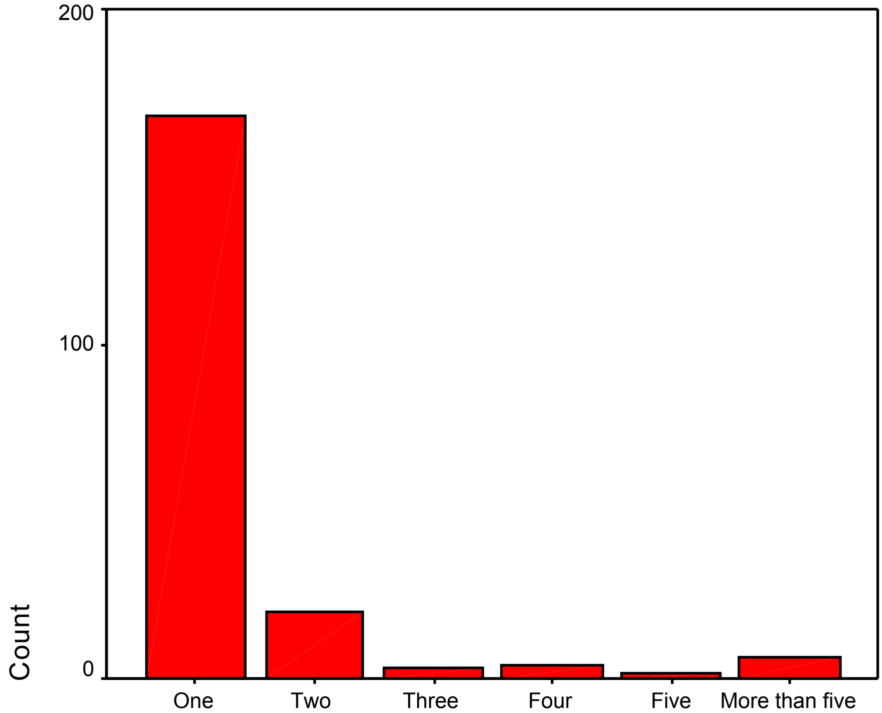


Table 53

How many sites do you operate from?	
One	83.2%
	9.9%
Three	1.5%
Four	2.0%
Five	0.5%
More than five	3.05
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 55: Number of sites across the North West.

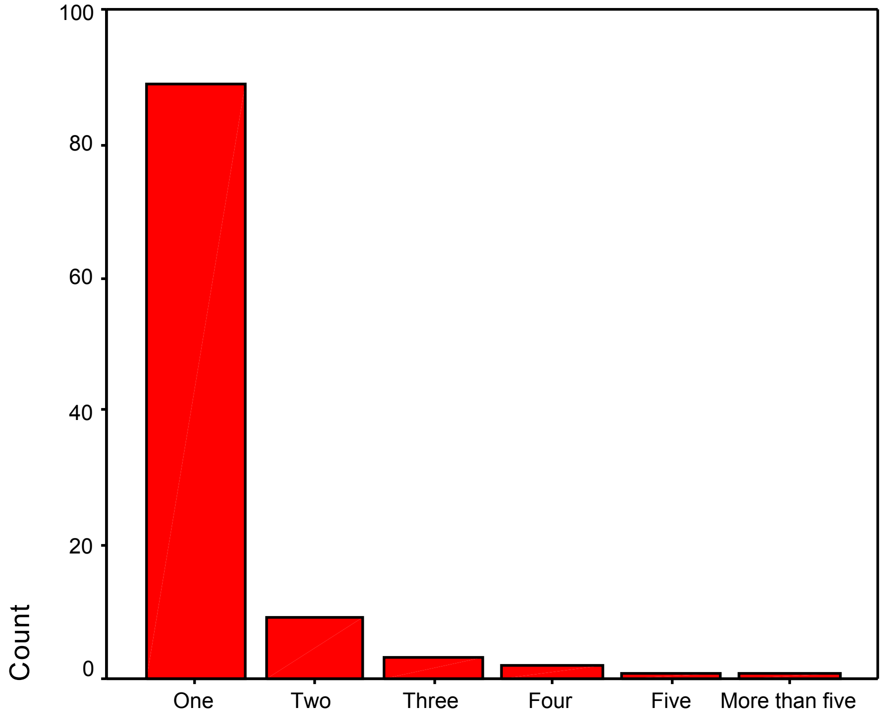


Table 54

How many sites do you op th West? Number=204	
One	84.4%
Two	8.8%
Three	2.9%
Four	1.9%
Five	1.05
More than five	1.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 56: Number of sites across Yorkshire & Humberside sectors.

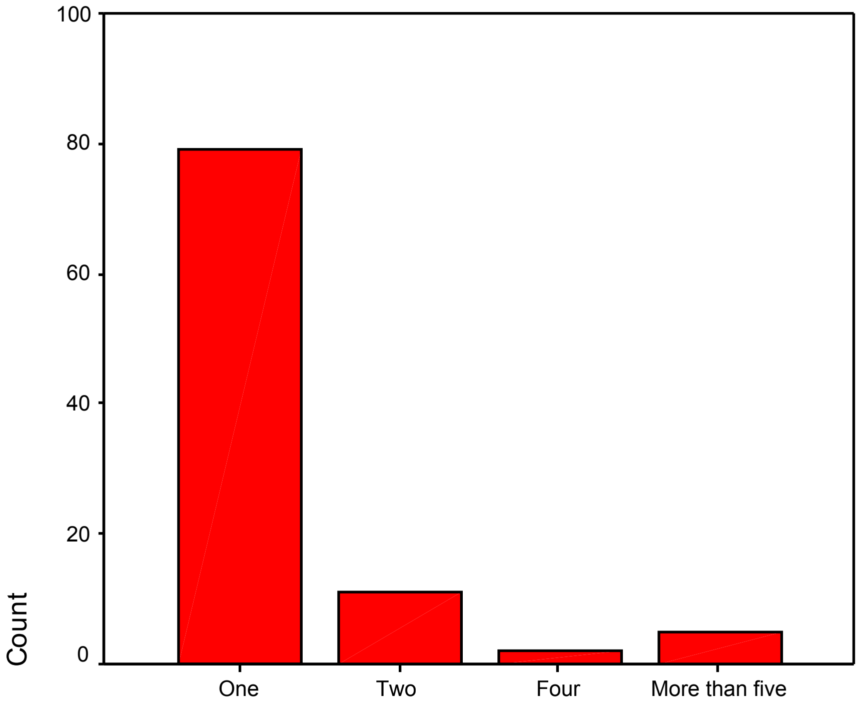


Table 55

How many sites do you op re & Humberside? Number=204	
One	81.4%
	11.3%
Four	2.1%
More than Five	5.2%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 57: The *location of sites* across the tw o regions.

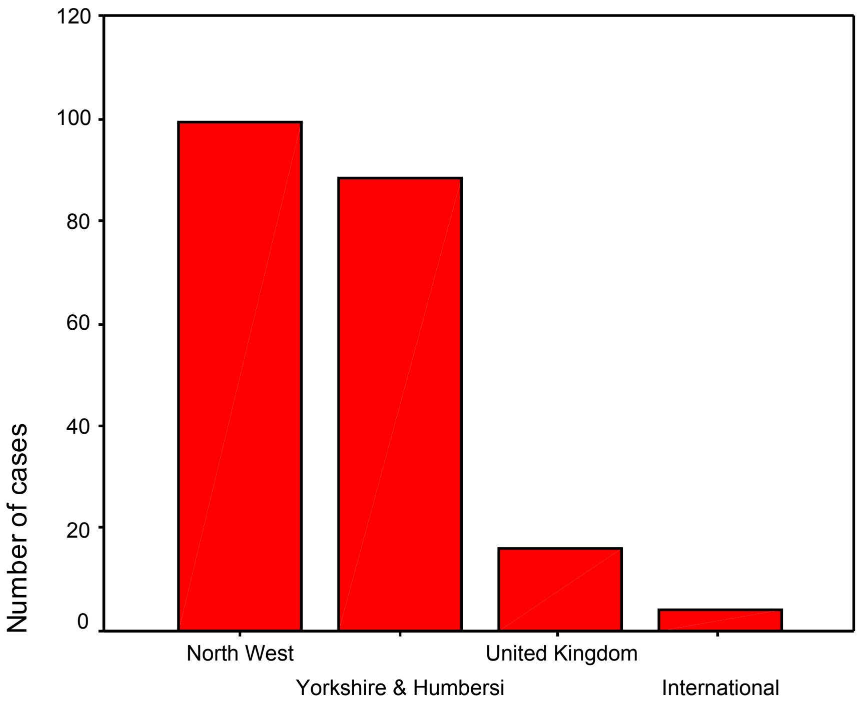


Table 56

Which of the following areas do you have sites in? Number	
North West	47.8%
orkshire & Humberside	42.5%
	7.7%
International	1.9%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Fig 58: The location of *sites* across the *North West* .

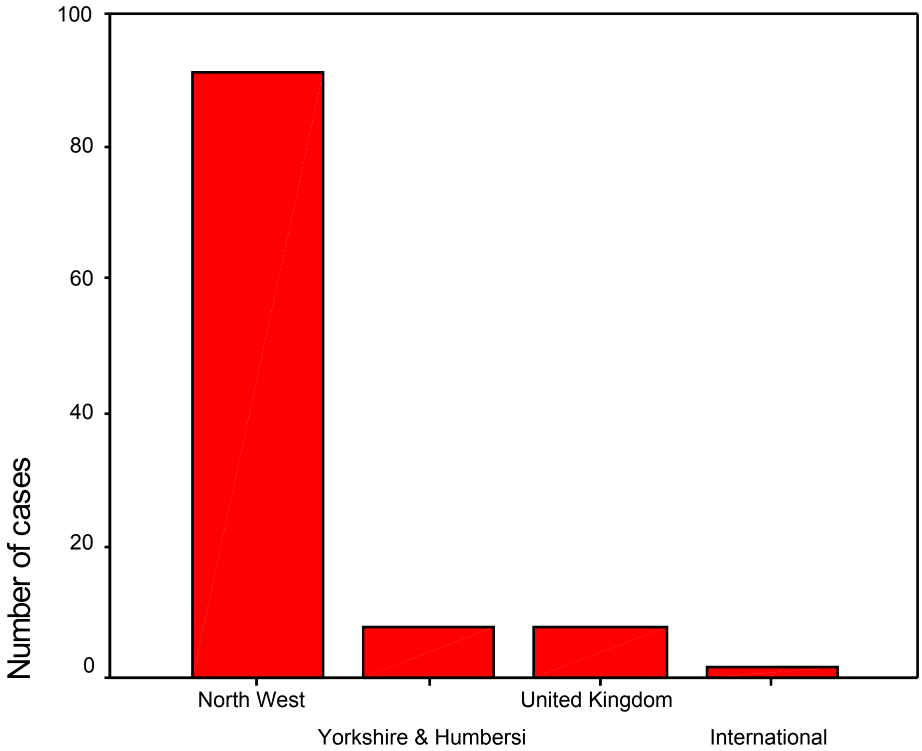
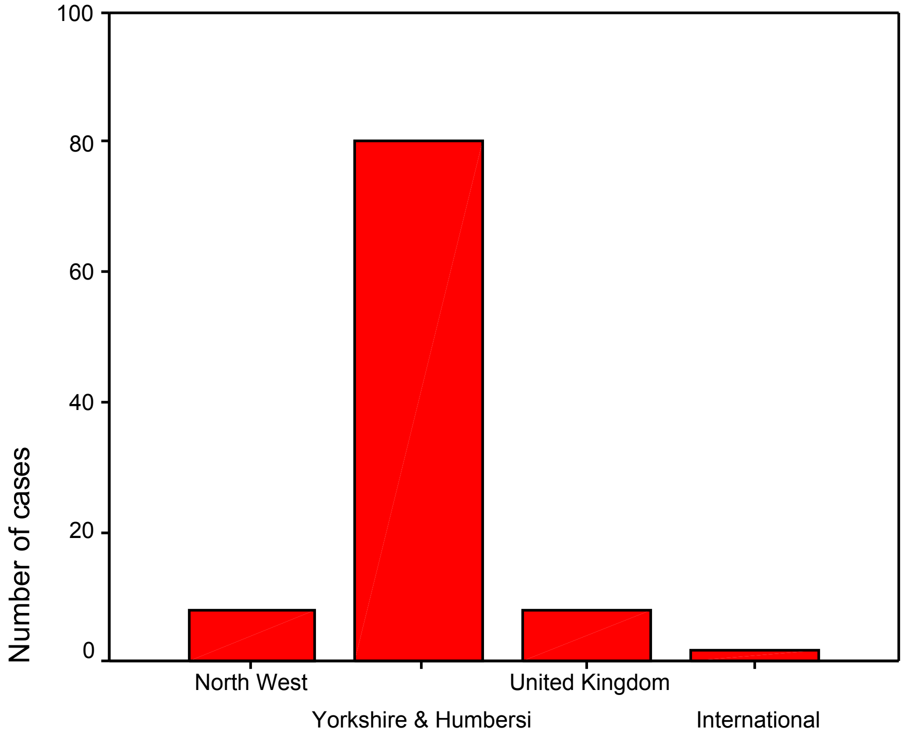


Table 57

Which of the following areas do you have sites in across the North West? Number=204	percentages
	83.5%
Yorkshire & Humberside	7.3%
United Kingdom	7.3%
International	1.8%
Total	100.0%

Source: Roodhouse & Heaton, 2001

<u>Fig 59</u>: The *location* of sites across *Yorkshire & Humberside* sectors.



Which of the following areas do you have sites in across Yorkshire & Humberside ? N	percentages
orth West	8.2%
umberside	81.6%
	8.2%
International	2.0%
Total	100.0%

Source: Roodhouse & Heaton, 2001

Overall characterisation of the sub sector in the two regions

The designer fashion sector in the Northwest, Yorkshire and Humber regions can be characterised as a complex sub-sector of activities from bridal wear to high fashion, with convergent design and manufacturing interests. These businesses are to a large extent micro, small and medium sized enterprises with annual incomes of less than £25,000, often a sole proprietor, the self-employed, and limited companies. There are however a significant number of very large businesses generating annual incomes in excess of £1 million.

It is noticeable that the sector shows no interest in clustering works largely in isolation and is strongly regionally based, with customers primarily located in the region and throughout the United Kingdom. The businesses themselves are often located in leased or proprietor owned premises, however there is a significant level of home working.

There has been a positive attitude to starting new businesses in the sector although this has declined in the last year. It is a sector with well-established businesses and growing.

Advice is often sought from banks and Business Link and once received is viewed as meeting a need. However, the sector is currently concerned with attracting new customers, promoting their businesses, sourcing suppliers and retaining existing customers.

Investment is occurring primarily in market research, marketing the organisation, product development, the acquisition of machinery and equipment, and information technology.

The sector relies upon its own financial resources, and the sale of goods and services is the primary source of income. Public grants and funds as well as sponsorship and help in kind are minimal. There seems to be little knowledge of grant schemes available to assist the sector particularly those derived from the European Union.

Most businesses employ relatively few full-time people and the female workforce dominates however nearly half are without contracts of employment. Within the ethnic minority groups employed in the sector both full and part-time the vast majority are of Indian and Pakistani origin. Part-time employment is insignificant and there are very few employees with special needs working in any of the organisations. There is no established trend of contracting with the self-employed, freelancers and those who work on a contract for services basis. Voluntary staff are not a noticeable feature of the work force. However as one would expect design as a discrete operation accounts for nearly half of all the activities that take place in the sector although the administrative job role is by far and away the most numerous function.

Training is not a major consideration with only around a third of employers and staff receiving training in the previous year although once this training is provided through on-the-job training or short course provision as the preferred modes of delivery the employer generally pays. However nearly at quarter paid for training themselves and the training was generally seen as appropriate for the needs identified.

It is an established, independent and growing sector contributing to the regional and national economy focussed on attracting and retaining customers.

Methodological Approach

The study employed a primary data source capture by postal survey using questionnaires. The questionnaires were followed up with telephone inquiries. The results of this survey were analysed using SPSS statistical analysis. The primary data was achieved by compiling a database of designer fashion businesses in the two regions. The main sources of the information for the database were local authorities, websites, telephone directories, specialist organisations, Chambers of

Commerce, marketing organisations and personal contacts. The aim was to cover as broad a spectrum as possible within the two regions. The database after screening out any closed businesses, duplications and unsuitable entries provided 1000 entries.
From this database, it was possible to identify the regional location of each business. This information ensured the accuracy of the final report findings including the geographical analysis information.
Constructing a representative sample, derived from the database it was possible to identify businesses in different locations, with different purposes thus ensuring regional spread.
The questionnaire used was designed and piloted to meet the needs of the survey. This consisted of primary closed multiple-choice questions. A small number of open questions were used and on most issues, respondents were provided with the option to choose "other" and asked to give details of "other" description. Generally, the aim of the questionnaire was to make the task of completing and returning the questionnaire undemanding and simple process. The quantity of data required from the respondents was focused upon the key areas of:

- About you and your activities
- Types of people working for you,
- Income and activity
- Training
- Organisational issues

It was estimated that the questionnaire would take 15 to 20 minutes to complete. The final selected suitable sample received a postal questionnaire together with instructions, explanatory covering letter and stamped addressed envelope. The final sample following careful screening consisted of the complete database, of all 1000, and the target response rate was 20% of the sample size. There were no weighting equations used, and as mentioned earlier retailing, modelling, and publications have been excluded. Manufacturing with a design component has however been included to give an overall picture of the sector. This issue has been explained in the introduction to the study.
Overall, 204 businesses responded to the questionnaire, representing just over 20% of the sample size, and achieving the desired response target.

Difficulties encountered in this type of approach.

When conducting any study, it is routine to anticipate difficulties. This study was no exception, with particular difficulties arising in the research largely because of gathering data through postal questionnaire.
Firstly, there is the difficulty of initially contacting and identifying participants to establish the primary database.
Because the postal questionnaire responses were slow it was decided to contact those that had received a questionnaire by telephone to encourage them to return the completed form and answer any questions that might be a concern to them. Although this proved a more effective means of communication difficulties were encountered in terms of identifying the individual in each of the companies that had received a questionnaire. The researchers spoke directly with designers within businesses explaining clearly the nature of the research and the importance of the participation. Once approached in this way the responders became interested and co-operative. Without this follow-up telephone, method the research would not achieved a satisfactory response rate. There were concerns expressed with regard to the purpose of this study and possible implications with regard to VAT and tax. Other problems encountered included contacting members of the ethnic minority groups

operating businesses. There existed a substantial language barrier, making contact and communication almost impossible to achieve. Many who did speak english were disinterested in the research and could not see the benefit to them. Some indeed were wary and did not have believe the researcher was conducting a valid study of the sector and therefore were unwilling to disclose any sensitive information regarding their business, especially questions relating to income.

Other barriers arose with the white population, largely consisting of a lack of interest in the research, particularly as to the benefit to their businesses. Finally, others claimed to be far too busy to take part and were unwilling to spare the time.

Future research

Clearly this research has limitations, however there are a number questions which arise, particularly the value chain, the lack of clustering, lack of information, the paucity of public sector grant aid, markets and customers, qualifications and levels, financial investment, as well as the comparison of this primary data with secondary sources.

Future studies may be improved by advertising the benefits gained for the sector by participating. This could be undertaken by advertising prior to contacting participants for research purposes and publishing the results.

Further studies of other regions would strengthen the data and begin to generate benchmarks.

Furthermore the value chain analysis would provide a useful comparative picture of the industry and there is evidence to suggest that this is now required for the designer fashion sector particularly with the problems associated with suppliers and customers. This would enable a better understanding of markets to emerge.

It is also the case that this sub sectoral approach enables the sic and soc codes to be fleshed out with the sector and replicated in other regions.

The methodology is proven and can now be applied to regions and sub sectors as a structured approach to data collection.

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