



THE ECONOMIC IMPACT OF THE FASHION INDUSTRY

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Fashion is a highly sophisticated, multitrillion dollar global industry. In the United States alone, consumers spent nearly \$380 billion on apparel and footwear in 2015.¹ The industry, which encompasses everything from textile and apparel brands to wholesalers, importers and retailers, employs more than 1.8 million people in the United States.² It relies on workers in a wide range of occupations, including fashion designers, market research analysts, computer systems developers, patternmakers, sewing machine operators and wholesale buyers.

The U.S. fashion industry is centered on two major clusters of design and innovation – New York City and Los Angeles. Together, these hubs are home to nearly two-thirds of the nation’s fashion designers.³ Fashion designers are the heart of the industry’s creative process, and their average annual earnings of more than \$73,000 rank among the highest of occupations in the sector. In New York City, considered by many there to be the fashion capital of the world, fashion is a \$98 billion industry, employing more than 5 percent of the city’s private-sector workforce.⁴ It is home to internationally recognized brands such as Ralph Lauren, Calvin Klein, Ann Taylor, Marc Jacobs and Brooks Brothers. Prestigious design schools such as the Fashion Institute of Technology, Parsons School of Design and Pratt Institute train new designers for success in the industry. Los Angeles also boasts a thriving fashion industry, with local companies bringing in nearly \$18 billion in revenues annually.⁵ It is home to many well-known companies including GUESS, Lucky Brand and BCBG Max Azria. The thriving apparel industry is supported by schools including the Fashion Institute of Design and Merchandising and Otis College of Art and Design.

Yet those cities are no longer the whole story. High-value jobs in the fashion industry that pay high wages are spreading throughout the country, meaning that the economic impact of the fashion industry is expanding beyond the industry’s traditional footprint. Clusters are emerging in the West and South, supported by design schools that equip graduates with the latest skills needed in the rapidly changing global fashion business.

Today’s Fashion Industry Focuses on High-Fashion, High-Value Products

The fashion industry in America has changed dramatically over the past century. In 1931, the Garment District in New York was home to the highest concentration of clothing manufacturers in the world.⁶ Over the past quarter-century, U.S. apparel manufacturing employment has declined sharply, from almost 940,000 jobs in 1990 to fewer than 138,000 jobs in 2015, with many jobs moving overseas.⁷ Even with the decline, New York and Los Angeles retain manufacturing bases that support the fashion industry.⁸

However, while many apparel manufacturing jobs have left the United States, new high-value fashion industry jobs are being created in New York, Los Angeles, San Francisco and other U.S. cities. As with many industries in the manufacturing sector, the United States now concentrates on the high-value parts of the apparel global supply chain: research and development (R&D), design and marketing.⁹ For example, computer-aided design helps designers turn concepts into samples, and helps manufacturers move from prototype to finished product on an accelerated timetable. Jobs in these fields, which typically require more education and training, hold the prospects of higher wages.¹⁰

The Fashion Industry Offers Diverse Employment Opportunities

Overall, fashion- and apparel-related industries employ more than 1.8 million workers across the country, in professions requiring a range of education and skills.¹¹

The number of people working as fashion designers – the occupation most closely associated with the fashion industry – has grown by nearly 50 percent in the past 10 years to over 19,000.¹² They are concentrated in apparel industries such as manufacturing and wholesale merchandising. Designers are among the highest paid workers in the fashion industry, earning an average of \$73,180 annually across all industries (see **Table**). Earnings can climb higher: fashion designers in motion picture and video earned an average annual wage of \$86,380.

The apparel manufacturing industry employs nearly 138,000 workers in the United States. Employment in the industry still includes occupations traditionally associated with apparel manufacturing, such as sewing machine operators, tailors and textile machine operators and patternmakers. Many of these occupations pay low wages. For example, there are nearly 55,000 sewing machine operators earning a median hourly wage of \$9.10.

However, the shift to higher-value parts of the process means that today's manufacturing jobs include a number of higher-paying occupations. For example, market research analysts and marketing specialists earn \$69,430 annually on average, and computer professionals earn \$73,720 on average.

The wholesale apparel merchandising sector employs roughly 148,000 individuals. These include business operations specialists whose annual earnings average \$68,530; graphic designers earning \$47,200 on average; and production, planning and expediting clerks earning \$48,840 on average.

Table: Employment in Selected Fashion and Apparel Industries and Occupations

	Number of Employees	Median Hourly Wage	Average Annual Wage
Fashion Designers (All Industries)	19,040	\$30.61	\$73,180
Apparel Manufacturing Industry (All Occupations)	137,510	\$11.69	\$35,270
<i>Selected Occupations</i>			
• Computer occupations (such as information analysts, developers, and systems administrators)	740	\$33.79	\$73,720
• Market research analysts and marketing specialists	560	\$29.48	\$69,430
• Fabric and apparel patternmakers	2,550	\$24.69	\$54,120
• Industrial machinery installation, repair, and maintenance workers	1,600	\$17.10	\$37,710
• Tailors, dressmakers, and custom sewers	1,930	\$12.78	\$28,240
• Textile machine setters, operators, and tenders	7,600	\$11.26	\$24,910
• Sewing machine operators	54,910	\$9.61	\$23,060
Apparel Wholesale Merchandising Industry (All Occupations)	147,940	\$17.57	\$52,940
<i>Selected Occupations</i>			
• Business operations specialists	5,530	\$28.89	\$68,530
• Graphic designers	1,410	\$21.10	\$47,200
• Production, planning, and expediting clerks	2,960	\$22.14	\$48,840
• Merchandise displayers and window trimmers	400	\$14.23	\$36,270
• Hand laborer and material movers	19,910	\$11.59	\$26,080
Apparel Retailers (All Occupations)	1,398,810	\$10.27	\$27,510
<i>Selected Occupations</i>			
• Market research analysts and marketing specialists	550	\$23.89	\$58,560
• Accountants and auditors	1,260	\$28.48	\$64,960
• Buyers and purchasing agents	2,860	\$24.82	\$59,490
• Designers	10,330	\$12.82	\$30,420
• Retail sales workers	1,057,490	\$9.54	\$23,480

Source: Bureau of Labor Statistics, Occupational Employment Statistics (May 2015 data)

Note: Occupations listed are intended to illustrate the wide range of occupations within each industry

The majority of fashion and apparel jobs are in the retail sector, with almost 1.4 million individuals employed throughout the country in apparel retail establishments. These jobs, which range from clerks to managers and executives pay about \$27,500, on average. However, within the retail sector there are occupations that pay higher wages. Accountants and auditors, for example, earn \$64,960 on average, and buyers and purchasing agents earn \$59,540, on average.

Education Prepares Students for Careers in the Creative Economy

In order to prepare students for work in the dynamic business of fashion, schools across the country now offer courses focused on all aspects of the industry. More than 200 postsecondary schools offer fashion-related programs.¹³ These programs build skills that are marketable not only in fashion, but

across industries. For instance, 8 percent of fashion designers worked in the motion picture and video industries in 2015.¹⁴ These schools also have a significant positive economic impact in their areas.¹⁵

Three of the most prominent design schools are located in New York City – Fashion Institute of Technology (FIT), Parsons School of Design and Pratt Institute. The Los Angeles area is home to several schools with programs dedicated to apparel design and merchandising, including the Fashion Institute of Design and Merchandising and Otis College of Art and Design. The Rhode Island School of Design, the Savannah College of Art and Design and Columbus College of Art and Design also are well-known for their strong design programs.

Fashion Hubs Such as New York and LA Are Prime Examples of Industry Clusters

The fashion industry is characterized by clusters of activity, whether in the large fashion hubs of New York or Los Angeles or in smaller hubs in a number of states. This mirrors trends in a range of industries, where clusters often develop in certain regions – for example, technology and computing in Silicon Valley, the film industry in Los Angeles, and life sciences in a number of areas including suburban Maryland and North Carolina’s Research Triangle.¹⁶

Research shows there are economic benefits when businesses in a particular industry cluster together in close proximity. This allows these businesses to take advantage of a skilled pool of labor and build relationships between suppliers and producers.¹⁷ Local educational institutions may develop specialized curricula and partner with area businesses to prepare students to enter jobs in the industry. Knowledge-sharing across businesses can foster innovation and enhance productivity, helping to boost wages for workers in the industry cluster.¹⁸ Successful industry clusters can also enhance economic opportunity for workers in other industries in the area by spurring demand.¹⁹

New York City is the Largest Fashion Hub in the United States

New York City is considered by many to be the fashion capital of the United States, and rivals Paris, Milan and London for the title of fashion capital of the world. With many of the top design schools interspersed with fashion company headquarters, manufacturers and major retailers, it is also a prime example of a fashion industry cluster.²⁰

An estimated 900 fashion companies have their headquarters in New York City.²¹ They include internationally recognized brands such as Ann Taylor, Calvin Klein, Rocawear and DKNY. The fashion industry employs more than 180,000 people in New York City, more than 5 percent of the city’s private-sector workforce.²² The industry pays more than \$11 billion in wages and generates almost \$2 billion in tax revenue each year.²³

The New York City metro area is home to nearly 40 percent of all of the fashion designers in the United States.²⁴ Many are trained in New York City’s prominent design schools—[Parsons School of Design](#), [Pratt Institute](#), [LIM College](#) and [Fashion Institute of Technology](#) (FIT). These prestigious schools provide top talent to New York City’s fashion industry. In addition, many of these schools have a secondary positive impact on New York City, attracting visitors and generating additional spending.²⁵

New York City's role in the fashion industry is highlighted every year during the semiannual New York Fashion Week, which has over 200,000 attendees annually.²⁶ Held in the spring and fall, Fashion Week generates close to \$900 million in total economic activity each year, according to an analysis by the New York City Economic Development Corporation. That estimate includes more than \$500 million in direct visitor spending.²⁷ The estimated impact of the semi-annual fashion weeks on the area's economy is larger than reported estimates of the economic impact of other major events in the area, such as the U.S. Open Tennis tournament, the New York City Marathon and the 2014 Super Bowl.²⁸ Fashion trade shows, showrooms and fashion shows also attract more than half a million visitors annually to New York City.²⁹

New York is also a hub for major fashion publications. Women's Wear Daily, Vogue and Harper's Bazaar are headquartered in the city, as are some of the largest advertising companies in the world. The city has sophisticated media and marketing resources that designers can utilize to promote their products and build their brands.

Los Angeles is the Second Most Prominent Fashion Cluster in the United States

Los Angeles is the second largest fashion hub in the United States. The Los Angeles area employs more than 99,000 people within the apparel, textile and wholesale industries, and the textile, and apparel industries pay almost \$7 billion in wages to workers in the region.³⁰ The Los Angeles area employs about one-quarter of all of the fashion designers in the United States.³¹ Local apparel companies earn almost \$18 billion in revenue in Los Angeles.³²

The Los Angeles area is home to several schools with programs dedicated to apparel design and merchandising, including the [Fashion Institute of Design and Merchandising](#) (FIDM) and [Otis College of Art and Design](#).

As a sign of how far Los Angeles has come, in 2012 Saint Laurent moved its main design studios from Paris to Los Angeles. Recently Saint Laurent even presented its fall 2016 men's and pre-fall 2016 women's collections in Los Angeles.³³

The Fashion Industry's Footprint Expands to Cities Across the Country

Beyond the New York City and Los Angeles areas, several cities are building their own reputations for fashion design. Many of these emerging design hubs are home to well-known brands and host annual fashion weeks. Area schools have developed fashion-related programs to support the growing industry.³⁴

According to the most recent data from the Bureau of Labor Statistics, there are about 690 fashion designers in the San Francisco Bay Area.³⁵ San Francisco is home to the headquarters of both Levi Strauss & Co. and Gap Inc. Overall, fashion designers in the Bay Area earn an average of about \$68,000 annually.

The San Diego area, where Reef sandals and the apparel companies Tribal Gear and Bad Boy are headquartered, is home to 330 fashion designers, earning an average of about \$70,000 per year.³⁶ Other coastal cities such as Portland, Seattle, Boston, Providence and Miami are developing

reputations as fashion hubs, with a pool of design talent, fashion and design programs at area schools and their own fashion weeks.³⁷

Outside of the coasts, Kansas City is home to nearly 250 fashion designers, earning an average of about \$56,000 annually.³⁸ Columbus, Nashville, Las Vegas and Dallas also have emerged as fashion hubs.³⁹

Outcome of Trade Debate Will Impact the Fashion Industry

As apparel production moved overseas, American consumers have dramatically increased their purchases of foreign-made apparel. In 2015, American consumers purchased more than \$81 billion in apparel from abroad, while American apparel manufactures exported \$4.8 billion, resulting in a trade deficit of \$76.2 billion.⁴⁰ Over one-third of these imports came from China (34 percent), with Vietnam (13 percent), Bangladesh (6 percent), Indonesia (6 percent) and India (5 percent) rounding out the top five countries of origin.⁴¹

While many apparel products are manufactured overseas, much of the value that goes into them is generated in the United States. Various studies note that conventional trade statistics may overstate the size of the trade deficit because they fail to accurately capture the value added at different stages of the design and development process.⁴²

Currently, there is a debate over international trade regulations, which may impact the U.S. fashion industry. U.S. apparel companies have a major stake in the debate over approving additional free trade agreements that would lower tariff barriers. Currently, most clothing sold in the United States is imported, notwithstanding trade barriers that raise prices paid by consumers on many items.

By adding to the cost of imported clothing, tariffs may shield domestic producers from competition with foreign manufactured goods, enabling them to compete with imports that would otherwise be priced lower. However, companies that keep the high-value parts of the supply chain at home while offshoring physical production may be harmed by tariffs. In theory, those producers can avoid tariffs by concentrating production in countries that are party to free trade agreements, but this concentration could come at the price of foregoing flexibility in responding to rapid shifts in demand. Alternatively, they can pass much of the additional cost of the tariffs to customers, but at the risk of losing market share.

For example, New Balance, a manufacturer of athletic footwear with production facilities in Maine and Massachusetts, has lobbied against the elimination of tariffs on footwear from Vietnam. However, Nike, which employs about 26,000 people in the United States, but which offshores nearly all physical production particularly to Asia (including Vietnam), has strongly supported such tariff reductions.⁴³

Reshoring: Signs Show that Some Apparel Manufacturing is Returning to the United States

While the future of the U.S. fashion industry lies in the high-value-added parts of the global supply chain, there are signs that companies may be bringing back some production activity. Apparel was the third largest reshoring industry in the manufacturing sector between 2011 and 2015, accounting

for 12 percent of manufacturing reshoring cases during that period, according to a recent analysis.⁴⁴ In 2015 alone, 30 apparel companies moved production back to the United States.⁴⁵

Fashion retailers may be better able to keep up with emerging trends and complete orders faster by shortening their supply chains and locating some production in the United States. Fashion retailers and brands also may be reshoring due to the benefits of producing smaller runs, since factory suppliers abroad may demand that products be produced in high volumes, and the overstock of these goods may have to be sold at a discount.⁴⁶ In addition, increased wages in China, which accounts for more than one-third of U.S. apparel imports, have increased the cost of production there, narrowing the gap between the cost of manufacturing in China and the United States.

U.S.-based fashion manufacturing benefits from new trends in the retail industry, which often demand small-batch, fast-turnaround products to meet fast changing consumer tastes. U.S. production allows for a product to be conceived of and produced in weeks. This is particularly important to small companies addressing niche markets. But even big names with large customer bases, such as Brooks Brothers, have increased their U.S. production in recent years to be able to react quickly to changes in the market.⁴⁷ Currently, 100 percent of Brooks Brothers' ties are made in its Long Island City, NY factory and roughly 85 percent of its suits are produced in its Haverhill, MA factory.⁴⁸

U.S. manufacturers may also benefit from consumer demand for products "Made in America."⁴⁹ Two-thirds of Americans say they "always" or "sometimes" look at labels to see if the product they are buying is made in America, according to a *New York Times* poll. When asked about a \$50 garment made overseas, almost half of those surveyed said they would be willing to pay \$5 to \$20 more for a similar piece of clothing made in the United States.⁵⁰ Moreover, some companies may manufacture their apparel in the United States due to the potential costs to their ethical reputation for producing goods made with low-wage or child labor in unsafe factories and/or in a way that harms the environment.⁵¹

Conclusion

Fashion is a sophisticated, thriving industry that employs nearly 2 million people in a diverse set of occupations across the United States. Apparel manufacturing is only one piece of the industry. As the industry has evolved, U.S. employers have changed with it, focusing on the high-value parts – R&D, design and marketing. Jobs in these fields pay well, and demand for these skills is growing.

Fashion is big business. In New York City alone, it is a \$98 billion industry.⁵² While much of the industry's economic impact is concentrated in New York and Los Angeles, where most U.S. fashion designers live and work, cities all across the country are seeing positive economic impacts from the fashion industry. As retailers and fashion designers cluster outside the traditional fashion hubs, this can help facilitate innovation in the fashion industry and benefit other industries in those regions as well.

Endnotes

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