



THE NEW ECONOMY OF FASHION

February 2016

Fashion is a multi-trillion dollar global industry, encompassing everything from textile and apparel brands to wholesalers, importers and retailers. Over a trillion dollars is spent annually on apparel and footwear around the globe, with nearly \$370 billion spent here in the United States.¹

The fashion industry—including retailers, manufacturers, designers and wholesalers—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, graphic design artists, computer systems developers, patternmakers, sewing machine operators, retail sales workers, wholesale buyers, accountants and business operations specialists.

The U.S. fashion industry has changed dramatically since the early part of the 20th century when its main focus was manufacturing. In 1931, the Garment District in New York was home to the highest concentration of clothing manufacturers in the world.³ Today the U.S. apparel manufacturing sector employs 135,000 workers while the retail sector has 1.4 million employees.

There are strong signs of a bright future for sectors of the fashion industry—primarily in design and high-tech manufacturing. The United States is a world leader in fashion design, rivaling other major international hubs like Paris, Milan and London. The U.S. apparel manufacturing sector is poised for a resurgence as it concentrates on the high-value parts of the apparel global supply chain: research and development (R&D), design and marketing.⁴ High-tech and creative jobs in these sectors often require more education and training but they also hold the prospect of higher wages.⁵

Among the most highly paid positions in the industry are fashion designers. Most Americans are familiar only with the most famous names—Ralph Lauren, Diane Von Furstenberg, Calvin Klein and Donna Karan, among others—who have established their own brands and operate large multi-million and multi-billion dollar companies. However, there are almost 18,000 designers working in the United States. This number has grown by almost 50 percent in the past 10 years alone.⁶ The median annual income for designers nationwide is greater than \$73,000.⁷

By far the two largest fashion hubs in the United States are New York City and Los Angeles. These cities employ nearly two-thirds of all U.S. fashion designers.⁸ Several of the most prestigious design schools in the United States are also found in New York City and Los Angeles.

A number of other U.S. cities are becoming smaller fashion hubs, driven by the economic benefits of industrial clustering and in some cases by elite fashion schools that help provide highly-skilled employees to nascent industries. Among these growing hubs are major metropolitan areas such as San Francisco, San Diego, Oakland, Miami, Dallas and Boston, as well as smaller cities such as Nashville, Columbus, Kansas City, Providence and Boulder.⁹

THE GEOGRAPHY OF THE U.S. FASHION INDUSTRY

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. Over 900 fashion companies have their headquarters in New York City.¹⁰ The fashion industry employs more than 183,000 people in New York City, approximately half of whom work in retail.¹¹ The industry pays nearly \$11 billion in wages and generates almost \$2 billion in tax revenue each year.¹²

New York City is home to nearly 40 percent of all of the fashion designers in the United States.¹³ 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.¹⁴

New York City's preeminent role in the fashion industry is highlighted every year during the semiannual New York Fashion Week, which has over 200,000 attendees annually.¹⁵ Fashion trade shows, showrooms and fashion shows also attract more than half a million visitors annually to New York City.¹⁶

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.¹⁷ The Los Angeles area employs over 23 percent of all of the fashion designers in the United States. Local apparel companies earn almost \$18 billion in revenue in Los Angeles.¹⁸

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 instead of Paris or New York.¹⁹

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

Several other cities have become hubs for fashion design—the San Francisco Bay Area, San Diego, Columbus and Nashville. Other U.S. cities that play an important role in the fashion industry include Las Vegas, Providence, Miami, Dallas and Kansas City.

The growth of these hubs has a strong economic rationale. Research shows there are tangible benefits to businesses in a particular industry when they cluster together in close proximity. This allows them to take advantage of a skilled pool of labor and build relationships between suppliers and producers.²⁰ It fosters innovation and enhances productivity, which in turn helps to boost wages for workers.²¹ They can also enhance economic opportunity for workers in other industries in the area by spurring demand.²²

Industry clusters, particularly in the design sector of the fashion industry, are supported by specialized educational institutions which partner with area businesses to prepare students to enter jobs in the industry. In some cities high-end fashion schools have become magnets for talent and in turn provide a pool of highly-skilled workers for local industry.

The economic benefits of industry hubs provide enormous benefits to fashion industry leaders like New York City and Los Angeles. But they also nourish the growth of smaller fashion hubs around the country.

- **The San Francisco Bay Area**

There are about 400 fashion designers in the Bay Area, including about 190 in Oakland and 160 in San Francisco (see **Figure 1**).²³ They earn an average of \$80,000 annually, roughly the same as their counterparts in the New York City area. The San Francisco Bay area is also home to the corporate headquarters of Gap Inc. (which owns the brands Gap, Banana Republic, Old Navy, Athleta and Intermix), Levi Strauss & Co. and The North Face.²⁴ San Francisco also hosts a fashion week—“[San Francisco Fashion Week](#)” focused on new technologies and the future of fashion. [California College of the Arts](#) and [Academy of Art University](#) are also based in San Francisco.

- **San Diego**

There are 260 fashion designers in the San Diego metropolitan area (see **Figure 1**). These designers earn a median annual salary of about \$67,000.²⁵ Reef Sandals and the apparel companies Tribal Gear and Bad Boy are headquartered in San Diego. There are several schools in San Diego that offer fashion programs including, [San Diego Mesa College](#) and the [Fashion Institute of Design & Merchandising](#). San Diego also holds a fashion week, which focuses on emerging designers.²⁶

- **Columbus**

The headquarters of several major retail brands are located in Columbus, Ohio, including Victoria’s Secret, Express, The Limited and Abercrombie & Fitch. Columbus is also home to several colleges with strong fashion design programs such as the [Columbus College of Art & Design](#) and [The Ohio State University](#). [Fashion Week Columbus](#) is an annual event that highlights local and emerging fashion designers.

- **Nashville**

Nashville has a growing and prominent fashion industry. Nashville is home to an annual [Nashville Fashion Week](#), which supports and highlights local Nashville fashion designers. In 2015, the [Nashville Fashion Alliance](#) was founded to advocate for and help accelerate the emerging fashion industry in Nashville. There are several schools in Nashville with programs related to the fashion industry: [O’More College of Design](#), [Tennessee State University](#) and the [Watkins College of Art, Design & Film](#).

- **Las Vegas**

Las Vegas hosts several of the major annual fashion industry trade shows: Agenda, POOL, AccessoriesTheShow, and Magic Market Week (the world’s largest fashion industry trade show). [Zappos’](#) headquarters are in Las Vegas, NV. [Fashion Week Las Vegas](#) is an annual internationally-focused fashion show with 35 designers showcasing their fashions.

- **Providence**

Providence is home to a clustering of elite fashion design schools including [Rhode Island School of Design](#) and the [University of Rhode Island](#). Providence, RI also has an annual fashion week-[Styleweek Northeast](#) that highlights the work of fashion designers in Providence and throughout the Northeast.

- **Miami**

Miami's Fashion Week Swim provides a platform for designers to introduce their latest swim collections and draws some of the top national designers. There are several schools in Miami with programs in fashion design and related fields including, [Lindsey Hopkins Technical College](#).

- **Dallas**

There are about 210 fashion designers in the Dallas metropolitan area. [Neiman Marcus'](#) and [JCPenney's](#) headquarters are both located in the Dallas metropolitan area. There are several schools in the Dallas metropolitan area with fashion and design programs: [Texas Women's University](#), [the Dallas County Community College District](#) and [Wade College](#). Dallas hosts several annual fashion shows: [Fashion X Dallas](#), [Runway Dallas](#) and Dallas Fashion Week.

- **Kansas City**

Approximately 200 fashion designers are in the Kansas City metropolitan area. Kansas City is also home to the headquarters of [Lee Jeans](#). Kansas City hosts an annual [fashion week](#). There are several schools in the greater Kansas City area with fashion and design programs: [University of Central Missouri](#) and [Kansas City Art Institute](#).

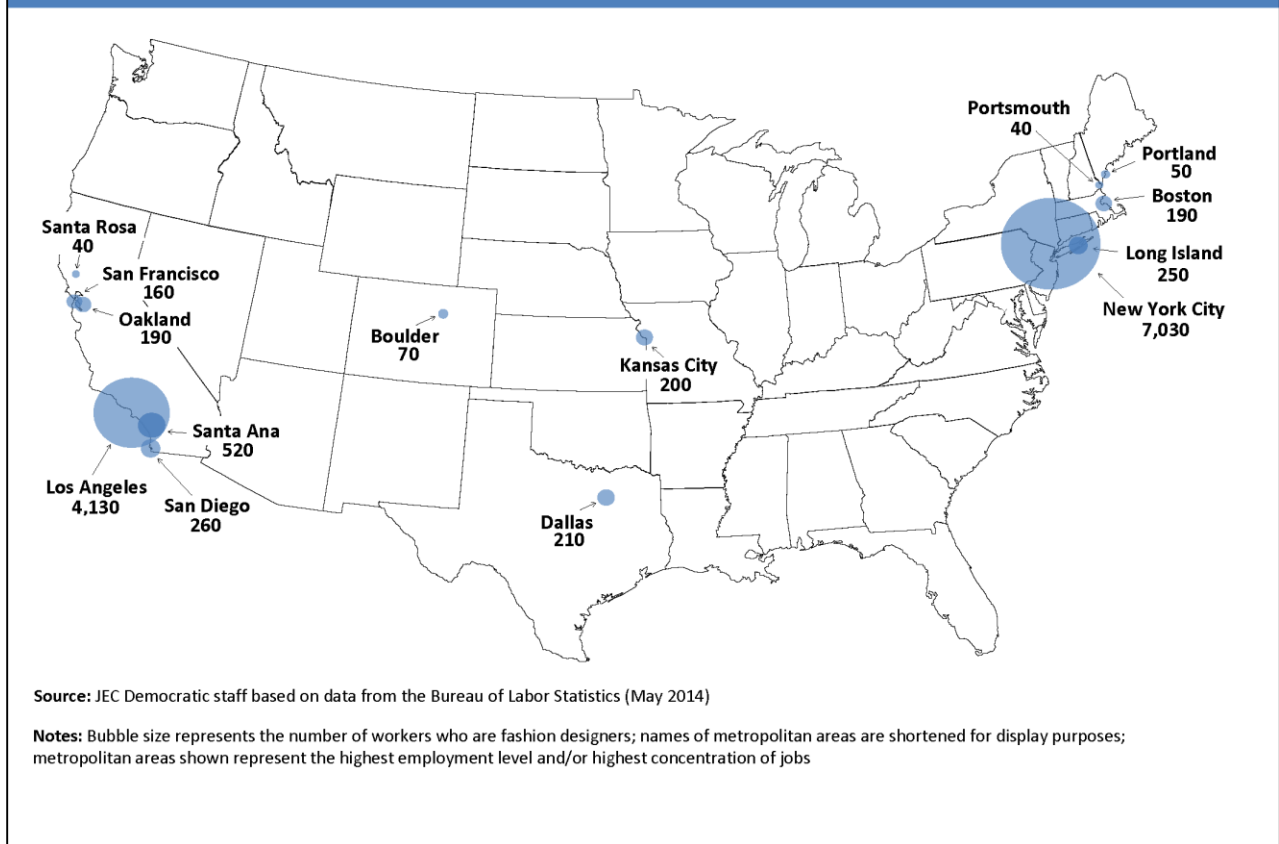
JOBS IN THE FASHION INDUSTRY

Fashion Designers

Fashion designers are at the heart of the industry's creative process. They are responsible for designing clothing, accessories and footwear. Typically, fashion designers sketch out designs, create patterns and choose the fabric and material that will be used to create a garment.

The states with the greatest number of fashion designers include: New York (7,190 fashion designers), California (5,750), Texas (500), New Jersey (340) and Massachusetts (270). The metropolitan areas with the largest numbers of fashion designers are New York City (7,030), Los Angeles (4,130), Santa Ana (520), San Diego (260) and Long Island (250) (see **Figure 1**). Fashion designers earn an average of \$73,690 annually, with a median hourly wage of \$30.78 (see **Table 1**).

Figure 1: Employment of Fashion Designers by Metro Area



New technologies, such as 3D printing and e-commerce, have rejuvenated the fashion design industry. These technologies allow smaller and less-established brands to enter the marketplace and compete with more established brands. 3D printing enables designers to print clothes and accessories faster and with a greater degree of detail in the fabrics and materials than is possible using more traditional methods.²⁷ 3D printing also allows for a much quicker turnaround and lower manufacturing costs, enabling less-established designers to create clothing and accessories that can compete with the bigger brands.

E-commerce sites like [Etsy](https://www.etsy.com/), which had almost \$2 billion in sales in 2014, have also revolutionized the fashion and apparel industries by allowing individual sellers to sell directly to buyers, circumventing wholesalers and traditional retail channels.²⁸ These websites allow millions of small companies and even individuals to sell their products directly without sophisticated distribution channels.²⁹

Apparel Manufacturing

The U.S. fashion industry has changed dramatically over the past century. In the 1930s its focus was on manufacturing and the Garment District in New York was home to the highest concentration of clothing manufacturers in the world.³⁰ As late as 1990, the apparel manufacturing industry employed nearly 939,000 people. But as manufacturing has moved overseas the sector has since lost more than 85 percent of its workforce and it employs 143,000 people as of May 2014.³¹

The U.S. apparel manufacturing industry employs about 143,000 people, over eight times as many workers as the design segment of the industry (see **Table 1**). However, median hourly wages (\$11.37) and the average annual wage (\$34,110) are less than half that of fashion designers. A number of these occupations pay less than half of the median household income (\$53,657 in 2014) in the United States.³² Some of these low wage occupations include sewing machine operators (\$21,970), textile machine operators (\$24,560) and tailors (\$27,510).

However, today’s manufacturing jobs also include a number of higher-paying occupations. Within the production stages, fabric and apparel patternmakers earn a relatively high average annual wage of \$52,150. There are also some non-traditional positions within apparel manufacturing including market research analysts and marketing specialists, who earn \$64,830 annually, on average, and computer professionals, who earn \$73,220 on average.

| Table 1: Employment in Selected Fashion and Apparel Industries and Occupations | | | |
|---|----------------------------|---------------------------|----------------------------|
| | Number of Employees | Median Hourly Wage | Average Annual Wage |
| Fashion Designers (All Industries) | 17,840 | \$30.78 | \$73,690 |
| Apparel Manufacturing Industry (All Occupations) | 142,860 | \$11.37 | \$34,110 |
| Apparel Wholesale Merchandising Industry (All Occupations) | 144,850 | \$17.21 | \$52,350 |
| Apparel Retailers (All Occupations) | 1,425,380 | \$9.93 | \$26,650 |

Source: JEC Democratic staff based on data from the Bureau of Labor Statistics, Occupational Employment Statistics (May 2014 data)

Currently apparel manufacturing in the United States is largely focused on high-fashion orders. Computer-aided design helps designers turn concepts into samples, and helps manufacturers move from prototype to finished product on an accelerated timetable.

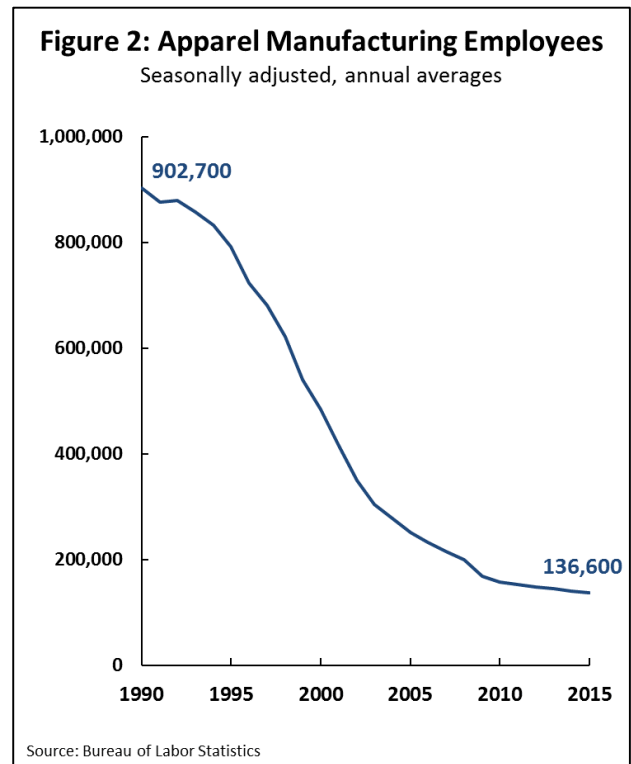
Cities such as New York and Los Angeles retain manufacturing bases that support the fashion industry. Fashion manufacturing represents three-in-ten manufacturing jobs in New York City.³³ Nearly two-in-ten manufacturing firms in the Los Angeles area are in the apparel and textile business.³⁴

At the same time that the United States is specializing in the high-value-added parts of the global supply chain, there are signs that companies may be bringing some production back home. According to the global strategy and management consulting firm A.T. Kearney, apparel was the third largest reshoring industry in the manufacturing sector in 2014 and accounts for 12 percent of manufacturing reshoring cases since 2010.³⁵

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 often demand that products are produced in high volumes that often have to be sold at a discount.³⁶

U.S. manufacturers may also benefit from consumer demand for products “[Made in America](#).” 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 [child labor](#) and/or in a way that harms the environment.³⁷

U.S.-based fashion manufacturing benefits from new trends in the retail industry, which often demands small-batch, fast-turnaround products to meet fast changing consumer tastes.



Wholesale Apparel Merchandising

Wholesale apparel merchandising involves buying, pricing, displaying, marketing and selling of garments and accessories in large quantities to be retailed by another firm.

The sector employs roughly 145,000 individuals. These include graphic designers earning \$48,320 on average; production, planning and expediting clerks earning \$47,680 on average; and installation, maintenance and repair workers earning \$43,430 on average.

The largest wholesalers selling decorated apparel merchandising—screen printed and commercially-embroidered apparel include: alphabroder (\$815.0 million in sales in 2014), SanMar (\$527.5 million), Bodek and Rhodes (\$245.1 million), S&S Activewear (\$210.0 million) and Ennis (\$202.5 million).³⁸

One out of every three people employed in wholesale apparel merchandising works as office and administrative support, earning a median hourly wage of \$15.13 with an annual mean salary of \$35,720 (see **Table 2**). Almost 20 percent of all those employed in wholesale apparel merchandising work in sales and related occupations earning a median hourly wage of \$21.97 and an annual average wage of \$60,040.

Table 2: Employment in Apparel Wholesale Merchandising Industry

| | Number of Employees (Sorted) | Percent of All Occupations | Median Hourly Wage | Mean Annual Wage |
|---|------------------------------|----------------------------|--------------------|------------------|
| All occupations | 144,850 | - | \$17.21 | \$52,350 |
| Office and administrative support | 47,460 | 33% | \$15.13 | \$35,720 |
| Sales and related occupations | 28,730 | 20% | \$21.97 | \$62,040 |
| Transportation and material moving | 26,580 | 18% | \$11.58 | \$27,300 |

Source: JEC Democratic staff based on data from the Bureau of Labor Statistics, Occupational Employment Statistics (May 2014 data)
Note: Data are for the top three Major Groups in National Industry-Specific Occupational Standard Occupational Employment and Wage Estimates

Apparel Retail Sales

The majority of fashion and apparel jobs are in the retail sector, with almost 1.4 million individuals employed throughout the country in retail establishments. These jobs, on average, pay \$26,650 per year, but even within the retail sector, there are higher-wage jobs for accountants, auditors, buyers, purchasing agents and others. Marketing and sales managers, for example, earn \$84,600 on average.

The largest apparel specialty retailers (by industry sales) include: the Marmaxx Group (TJ Maxx, Marshalls, etc.), Nordstrom Inc., Ross Stores Inc., Victoria’s Secret Stores and Old Navy.³⁹ In 2015, these five retailers combined sold over \$46 billion worth of apparel.

Sales and related occupations account for most of those employed in apparel retailers and earn a median annual salary of \$26,650. The next largest occupation office and administrative support with a median annual salary of \$25,250 (see **Table 3**).⁴⁰

Table 3: Employment in Apparel Retailers

| | Number of Employees (Sorted) | Percent of All Occupations | Median Hourly Wage | Mean Annual Wage |
|--|------------------------------|----------------------------|--------------------|------------------|
| All occupations | 1,425,380 | - | \$9.93 | \$26,650 |
| Sales and related occupations | 1,240,740 | 87% | \$9.68 | \$25,230 |
| Office and administrative support | 107,330 | 8% | \$10.56 | \$25,250 |
| Production occupations | 22,690 | 2% | \$15.29 | \$36,150 |

Source: JEC Democratic staff based on data from the Bureau of Labor Statistics, Occupational Employment Statistics (May 2014 data)
Note: Data are for the top three Major Groups in National Industry-Specific Occupational Standard Occupational Employment and Wage Estimates

Models

Models are another essential part of the fashion industry. These men and women help designers promote their work by posing for ad materials and displaying fashion products at shows and in retail outlets.⁴¹ Although only a handful of models achieve supermodel status— including Cindy Crawford, Gigi Hadid,

Naomi Campbell, Elle Macpherson and Linda Evangelista—there are 5,140 individuals in the United States employed as models.⁴² And while supermodels typically hold multi-million dollar contracts, the median full-time annual income of a model is \$19,970.⁴³

The majority of fashion models are employed by clothing stores (2,760), but many are employed by colleges, universities, professional schools and junior colleges (1,350).⁴⁴ The states that employ the greatest number of models are: Texas (1,440), Massachusetts (850), California (520), New York (290), and Oregon (170).⁴⁵

Trade Issues Pertaining to the Fashion Industry

As apparel manufacturing jobs have moved overseas, American consumers have dramatically increased their purchases of foreign-made apparel. In 2015, American consumers purchased more than \$87.9 billion in manufactured apparel from abroad, while American apparel manufactures exported only \$6.1 billion, resulting in a trade deficit of \$81.8 billion.⁴⁶ Over one-third of these imports came from China (37 percent), with Vietnam (12 percent), Bangladesh (6 percent), Indonesia (6 percent) and India (4 percent) rounding out the top five.⁴⁷

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.⁴⁸

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 from imports, enabling them to sell their product at a higher price than would otherwise be the case without losing market share. However, producers engaged in 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—nearly all of them in the high-value part of the supply chain—but which offshores nearly all physical production particularly to Asia (including Vietnam), has strongly supported such tariff reductions.⁴⁹

Conclusion

Today's fashion industry looks very different from even 25 years ago. While many of the traditional manufacturing jobs have moved off-shore, today there are more than 1.8 million people across the country

working in fashion design, apparel manufacturing, wholesale apparel merchandising, retail sales and modeling.

As the fashion industry has evolved, U.S. employers have changed with it. Changes in technology, such as 3D printing, and the explosion in e-commerce, have opened up new opportunities for smaller, less-established designers and brands. Focusing on the high-value components of the global supply chain, including R&D, design and marketing, has spurred innovation in regional economies across the country.

While much of the fashion industry's economic footprint remains concentrated in New York and Los Angeles, other cities across the country, including San Francisco, San Diego, Providence and Miami, are seeing positive economic impacts from the fashion industry.

The trend of regional clustering of retailers and fashion designers has helped promote idea-sharing, increase efficiency and spark innovation in the fashion industry. Other industries in those regions are benefitting as well. For instance, these regional hubs are often supported by top design schools that prepare students to compete in the multi-trillion dollar industry.

The concentration and collaboration of designers, manufactures, retailers and educational institutions are helping individuals in regions across the country obtain the skills needed to work in the broad range of jobs in today's fashion industry. With this innovative resurgence, the United States is well-positioned to extend its leadership in the highly-skilled design sector of the fashion industry.

Employment in Selected Fashion and Apparel Industries and Occupations

| | Number of Employees | Median Hourly Wage | Average Annual Wage |
|---|------------------------|--------------------------|---------------------------|
| Fashion Designers (All Industries) | 17,840 | \$30.78 | \$73,690 |
| Apparel Manufacturing Industry (All Occupations) | 142,860 | \$11.37 | \$34,110 |
| <i>Selected Occupations</i> | | | |
| • Computer occupations (such as information analysts, developers, and systems administrators) | 940 | \$33.93 | \$73,220 |
| • Market research analysts and marketing specialists | 570 | \$28.84 | \$64,830 |
| • Fabric and apparel patternmakers | 2,770 | \$23.34 | \$52,150 |
| • Industrial machinery installation, repair, and maintenance workers | 1,660 | \$16.73 | \$36,610 |
| • Tailors, dressmakers, and sewers | 3,050 | \$11.38 | \$27,510 |
| • Textile machine setters, operators, and tenders | 7,830 | \$11.11 | \$24,560 |
| • Sewing machine operators | 58,400 | \$9.29 | \$21,970 |
| Apparel Wholesale Merchandising Industry (All Occupations) | 144,850 | \$17.21 | \$52,350 |
| <i>Selected Occupations</i> | | | |
| • Business operations specialists | 5,320 | \$30.12 | \$67,950 |
| • Graphic designers | 1,450 | \$21.44 | \$48,320 |
| • Production, planning, and expediting clerks | 2,420 | \$20.62 | \$47,680 |
| • Merchandise displays and window trimmers | 280 | \$15.12 | \$35,680 |
| • Hand laborer and material movers | 21,450 | \$11.14 | \$25,070 |
| Apparel Retailers (All Occupations) | 1,425,380 | \$9.93 | \$26,650 |
| <i>Selected Occupations</i> | | | |
| • Marketing and sales managers | 5,490 | \$32.18 | \$84,600 |
| • Accountants and auditors | 1,570 | \$30.36 | \$69,960 |
| • Buyers and purchasing agents | 2,710 | \$24.37 | \$56,550 |
| • Designers | 9,960 | \$12.41 | \$30,620 |
| • Retail sales workers | 1,079,330 | \$9.37 | \$22,760 |

Source: JEC Democratic staff based on data from the Bureau of Labor Statistics, Occupational Employment Statistics (May 2014 data)

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