Washington State
Fashion and Apparel Industry Cluster Study

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EXECUTIVE SUMMARY

Introduction

The Washington State Fashion and Apparel Industry Cluster offers assets and opportunities for economic growth in 2010 and beyond. The Washington Fashion and Apparel Cluster includes core sectors such as apparel design, textile and apparel manufacturers, apparel wholesalers and apparel corporate headquarters. Local, national and global apparel retail stores located in Washington contribute the Cluster.

Fashion, apparel and textiles have a rich history in Washington. Global companies have grown from the region's historic strengths in apparel and textile manufacturing, including strengths in the competitive niches of outdoor gear and sportswear.

This mature local industry and related sectors appear ready for targeted economic development policy and initiatives, to capitalize on opportunities to leverage the region's well known strengths in technology and design.

This report provides updated data and perspectives on the significance of the Fashion and Apparel Industry Cluster in the Puget Sound Region and Washington State.

Washington Cluster Strengths

The opportunities for growing the Fashion and Apparel Industry Cluster in Washington stem from the following strengths.

Local designers with international acclaim. Seattle, in particular, is home to designers that represent a broad range of styles. Some attract international clientele to Seattle for custom designs. Others lead production of styles mass produced that are sold at retailers throughout the world.

International retailers borne from Washington companies. Nordstrom, REI, Eddie Bauer, Filson and several others have grown from local Seattle businesses to be worldwide brands. Several reflect the Pacific Northwest's outdoor and recreational opportunities.

Washington State University Department of Apparel, Merchandising, Design and Textiles. Nationally and internationally recognized faculty at WSU are leaders in research and preparing students to enter the industry. Over half of the faculty has relevant industry experience with research in areas of international trade, business, consumer behavior, protective and functional apparel, textiles, sustainability and model development for predictive performance. WSU is the only public academic institution in Washington offering undergraduate and graduate degrees in Apparel Design and Merchandising.

Trade schools and college programs. Educational institutions such as Seattle Central Community College, Seattle Pacific University, International Academy of Design and Technology, Seattle Art Institute, and University of Washington Retail Management Program offer certificate, associate's degree and bachelor degree programs.

Current Impacts

Approximately 1,540 apparel employer establishments and more than 3,100 self-employed provide nearly 34,500 jobs in Washington State (**Exhibit 1**). Employers in design and manufacturing, wholesale and corporate headquarters sectors provide more than 8,400 jobs; apparel retail sectors provide 22,000 jobs.

Taxable retail sales in apparel totaled $3.4 billion in Washington State in 2009. Apparel retail sales generated an estimated $300 million in retail sales tax revenues for Washington State jurisdictions.

Gross business revenues among fashion and apparel companies totaled nearly $8.3 billion in 2009. $3.3 billion of the revenues come from manufacturers and wholesalers, much of which includes revenues from exporting to other states and countries.

State impact models suggest the Fashion and Apparel Industry Cluster supports a total of 51,700 jobs and $16.4 billion in revenue in Washington State, including direct, indirect and induced impacts. Excluding retail, Apparel design, manufacturing, wholesale and corporate headquarters support a total of 17,230 jobs and $6.7 billion in revenues statewide.

Washington includes approximately 3,150 non-employer firms in the Fashion and Apparel cluster, representing more than 4,000 self-employed individuals. The non-employer establishments are concentrated in independent clothing sellers, apparel manufacturers and wholesalers.

Exhibit 1
Economic Impacts of the Fashion and Apparel Industry Cluster in Washington State, 2009 (2009 Dollars)

Jobs	
Design and Manufacturing	2,140
Wholesale	2,480
Headquarters	3,810
Retail	22,000
Total Non-Employers	4,030
Total Jobs	**34,460**
Taxable Retail Sales (billions)	**$3.4**
Gross Business Revenues (billions)	
Manufacturing, Wholesale, HQ	$3.31
Retail	$5.00
Total Revenues	**$8.31**
Impacts of Manufacturing, Wholesale and HQ	
Total Jobs	17,230
Total Revenues (billions)	$6.7
Total Statewide Economic Impacts	
Total Jobs	51,690
Total Revenues (billions)	$16.4

Source: Washington State Employment Security Department, Washington State Department of Revenue (2010).

Emerging Trends in Apparel Technology

The Washington Fashion and Apparel Industry Cluster focuses on creating intellectual property and relies on firms throughout the world for production and distribution of products. Major retailers leverage communication, inventory, product development and product lifecycle management software to respond dynamically to emerging trends and maximize sales.

Washington fashion and apparel companies, large and small use e-commerce technologies to sell directly to consumers on a worldwide basis. New social networking and mobile technologies allow retailers to reach and understand their consumers better than ever before. Fashion and Apparel businesses use technology to improve efficiency, support online and mobile sales, interact with customers and maximize profits.

Technologies will also help bring apparel production processes back to the United States. 3-D modeling, mass customization technologies, and advanced engineering and production software help lower domestic production costs and support smaller scale, high-tech apparel manufacturing.

Industry Cluster Recommendations for Growth

Local fashion and apparel leaders and cluster stakeholders emphasize that retaining Washington's best design talent and fashion entrepreneurs should be a lead strategy to retaining and growing the industry locally.

To grow the Fashion and Apparel Cluster, industry experts emphasize the need for support industries and supply chain resources. For example, design stakeholders desire more fabric and samples suppliers and apparel manufacturers in Seattle. Industry experts identified the following strategies as useful to growing the cluster locally:

- **Incubators.** Incubators fit this industry particularly well. Creative, talented individuals rarely emerge as entrepreneurs backed with a depth of start-up capital. Design incubators provide tools and resources at low cost to entrepreneurs. Fashion and apparel incubators foster synergy and collaboration within the industry.

- **Professional Networking.** Established and emerging niches in the Fashion and Apparel Industry rely on creative exchange and collaboration. Industry leaders identified the need for networking resources, access to financing, and expert training for international customs and business relations.

- **Training.** Educational and training institutions can better prepare students to succeed by integrating business and fashion education.

Contents

INTRODUCTION

Background and Purpose

Washington State has long held a presence in fashion, apparel and textiles. This project serves as a quantitative and qualitative assessment of the Fashion and Apparel Industry Cluster in Washington State and the Puget Sound Region. The study illuminates the Cluster's strengths and growth potential, and supports targeted economic development policy and initiatives.

Methods

The analysis relies on custom data analysis, interpretation of secondary data sources and perspectives and insights from local industry leaders.

Data reported and the sources of information are as follows:

- Information on fashion and apparel firms, jobs, occupations and wages from Washington State Employment Security Department (ESD)'s Quarterly Census of Employment and Wage data (QCEW data), including custom data summaries provided by the Puget Sound Regional Council (PSRC).

- Business revenues and taxable retail sales from the Washington State Department of Revenue.

- Emerging innovations, key challenges and opportunities detailed in interviews with leading executives in the Fashion and Apparel Industry.

Organization of Report

The report is organized as follows:

- **Cluster Overview.** A description of the Fashion and Apparel Cluster, including a cluster map displaying graphically the far-reaching connections of the industry within the regional economy.

- **Measures and Impacts.** A quantitative analysis of the Fashion and Apparel Cluster, including estimates of jobs, retail sales, revenues, imports and state-wide economic impacts.

- **Workforce Assessment.** An overview of workforce trends and forecasts, as well as education and demographic characteristics.

- **Interview Summaries.** A summary of findings from interviews of local industry leaders.

- **Synthesis and Conclusion.** An interpretation of the overall significance of the cluster and implications for the future of the industry.

CLUSTER OVERVIEW

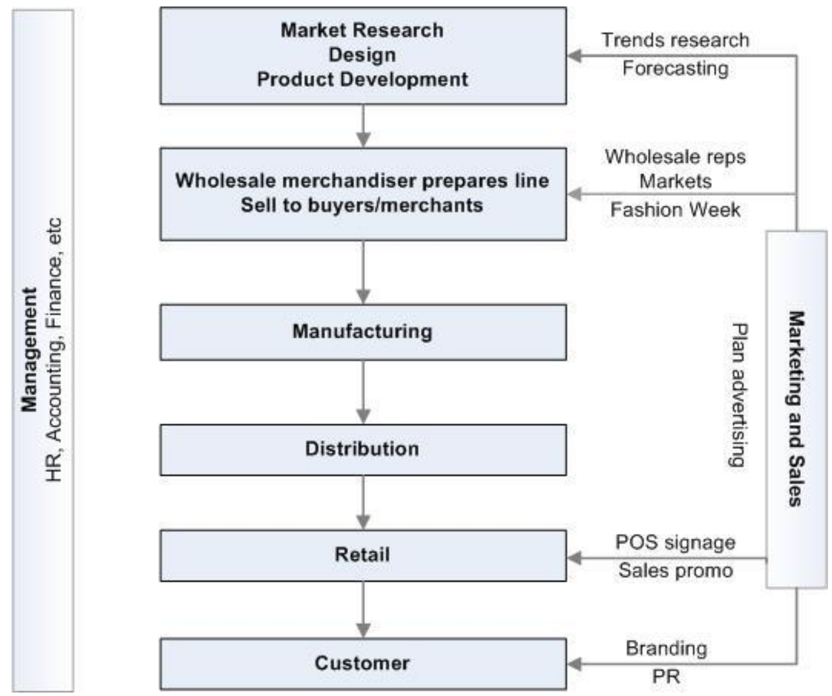
Industry Value Chain

The Fashion and Apparel Industry in Washington leads an exciting period of change for the industry value chain. The value chain describes the activities within the industry that transform raw materials into finished goods, as well as the support services required to bring product to market.

Historically, the Fashion and Apparel Industry value chain has been a process of market research, design, and product development, buyers and merchandiser sales, manufacturing, distribution, and retail integrated with management and marketing activities (**Exhibit 2**). Fashion and apparel companies completed all or some of these activities based on the degree of vertical integration within the firm. Customers and consumer demand shaped activities in the value chain, with market segments' demand for price and styles affecting production and sales decisions.

More recently, however, fashion and apparel businesses have been able to let customers influence relationships between industry components. This evolution is highlighted throughout this study as an emerging strength of the industry in Washington State. New technologies and sales avenues are transforming the value chain from a linear step-by-step process to a more dynamic process where performance and trends guide real-time value chain interaction and immediate adjustments throughout production.

Exhibit 2
Simplified Fashion and Apparel Value Chain



Source: enterpriseSeattle (2010).

The Washington State Fashion and Apparel Cluster Map (**Exhibit 3**) illustrates how tools and technology, talent and research and training institutions create interactions and opportunities in the Cluster. Companies engage in all or part of the value chain, as expanded and shown on the left-most portion of the cluster map. Creative and skilled individuals, training institutions and professional associations plug in all aspects of the industry, illustrated to the right. The cluster culminates in the customer relationship, which in 2010, in fact, drives the industry, as explained further throughout this report.

Fashion and Apparel Core Industries (center) represent the primary components of the value chain including design, product management, manufacturing, wholesale and distribution and retail. The latter three components include buyers and merchants.

Talent and Occupations (top right) is a general term for the industry-focused professionals that drive innovation and lead the cluster. This includes the creative forces that conceptualize and implement new products and fashions, products and business concepts, as well as talent from information technologies that adapt software and technology for fashion and apparel design, production and delivery.

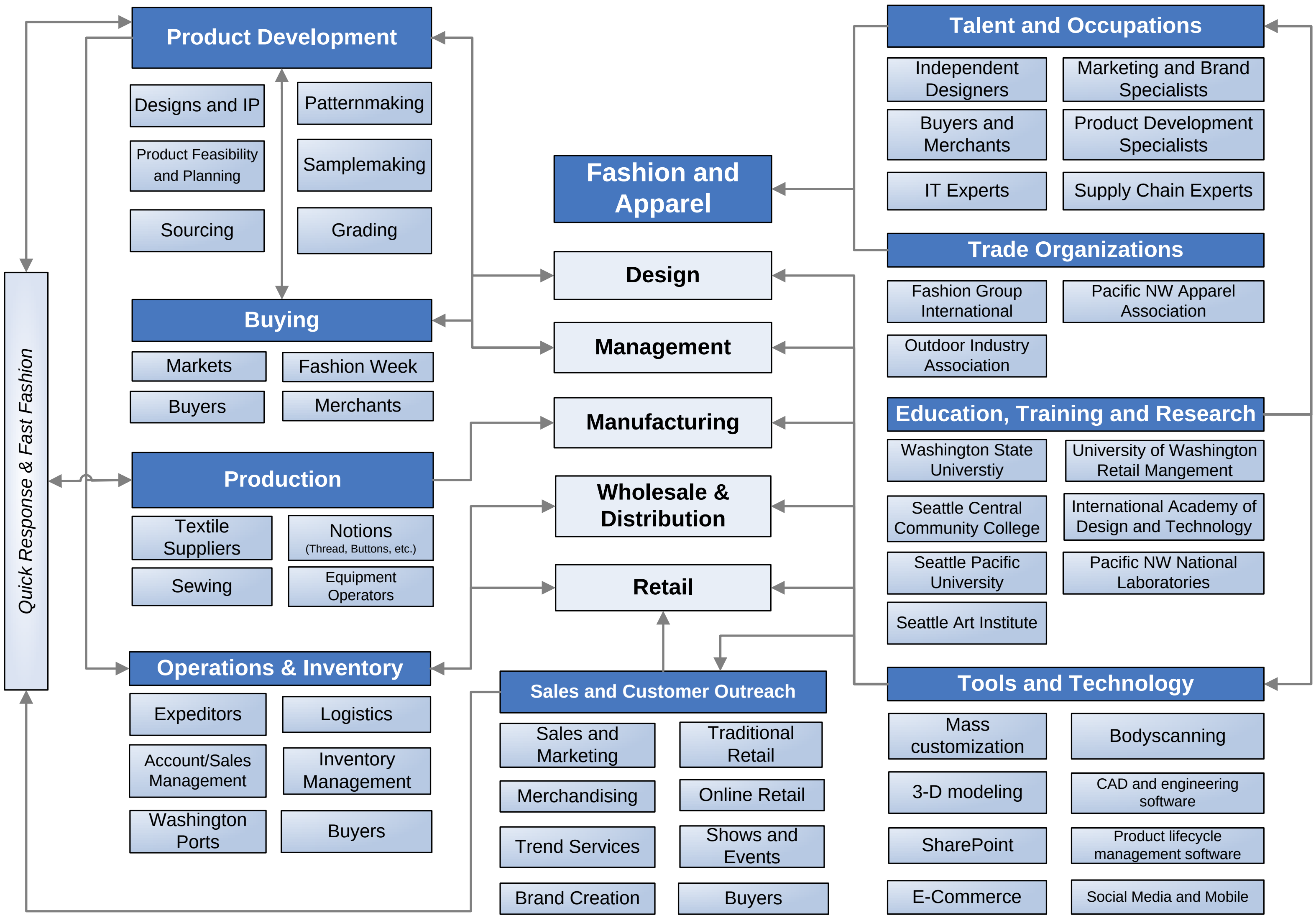
Trade Organizations (upper middle right). State Fashion and Apparel companies support each other primarily through three trade associations, described as follows:.

- **Fashion Group International (FGI)** is a global organization with a chapter in Seattle. Its members (5,000 worldwide) come from all segments of the fashion industry, including apparel, accessories, beauty products and services, and home decoration. FGI's mission is to assist its members in professional career advancement through networking activities and providing information on national and international trends.

- The **Outdoor Industry Association** (OIA) is a trade organization for companies serving the active outdoor recreation market. Members include manufacturers, distributors, suppliers, sales representatives, and retailers. The OIA provides its members with support services such as providing business intelligence, advocacy on legislation, and cost-saving benefits. Companies such as REI, Outdoor Research, Eddie Bauer, Filson, ExOfficio, Helly Hansen, Kavu, Cascade Designs, Brooks Sports, and even Amazon.com are members.

- The **Pacific Northwest Apparel Association (PNAA)** has organized and run the NW Trend Show for the past 66 years, making it the longest running women's wear show in the West Coast. The PNAA produces five trend shows a year that draw more than 160 exhibitors and 2,300 buyers from independent retailers, such as specialty boutique stores, gift shops, and catalogue businesses. The exhibitors are mostly independent sales representatives representing over 650 lines of women's, men's and children's apparel, accessories, shoes, and gift items.

Exhibit 3
Fashion and Apparel Industry Cluster



Source: Community Attributes, enterpriseSeattle, Washington State University (2010).

Education, Training and Research Institutions (middle lower right) lead workforce development and cluster innovation. Washington educational institutions offer a variety of educational options and models including trade schools, career colleges and universities. Many institutions in our state lead regional education training opportunities including Washington State University, Seattle Central Community College, International Academy of Design and Technology, Seattle Pacific University, and Seattle Art Institute. Washington State University and Pacific Northwest National Laboratories lead innovation of cluster-related technology and infuse the Cluster with new tools. For example, PNNL developed nanotechnology applications for water-resistant and stain-resistant fabrics and body scanning technology, originally derived from federal or military research, now used for apparel design applications. The University of Washington's strengths in software and interactive media are also talent pools from which the Fashion and Apparel cluster draws.

Tools and technology (middle lower right) are integrated within fashion and apparel's core industries. Software supports "quick response" throughout the value chain and customer experience, allowing businesses to dynamically respond to trends and maximize sales.

E-commerce, mobile and social media technologies allow retailers to reach and understand their consumers better than ever before. Emergence of social media tools has helped transform the fashion and apparel industry to a consumer-driven industry from a design-retail driven industry.

Body scanning is an emerging technology that helps to create a 3D rendering of a body form and allows for a quicker way to take body measurements. The military use body scanning for taking faster measurements for soldiers' uniforms; and northwest apparel companies use body scanners to make better fitting high performance apparel. 3-D modeling and draping software enhance visualization and fabric simulation, to increase efficiency and reduce product development costs. Made-to-measure software allows for mass customization of apparel. Mass customization application programming interfaces (API) allow the customer to design or customize products to their exact specifications.

Sales and Customer Outreach (bottom) includes sales, marketing, brand creation and trend services. Sales performance at stores, online outlets, and shows influences all aspects of the Cluster. Trend services inform merchandising planning and prototyping of new fashions.

Operations and inventory (bottom left) includes activities that distribute products for wholesale and retail sales. Expeditors and account and sales managers use inventory management technologies to link local international partners and accommodate real time changes in supply and demand. Washington ports are one of the cluster's most import and assets.

Production (lower middle left) includes international and domestic players. Off-shore production offers efficiencies of scale with large minimums and lowers per unit costs. Domestic manufacturing firms specialize in faster order-to-service delivery times, problem solving and customization. Local manufacturing firms have smaller minimums and higher unit costs.

Buying and Merchandising (upper middle left) drives planning and design, especially for larger retailers. Buyers and merchants view the latest fashions and apparel prototypes at fashion markets and shows. Buyers and merchants help set demand for new products at retail chains, which informs mass production of prototype products.

Product Development (top left) is a primary focus of Washington State's Fashion and Apparel Industry. Market research is used to help merchandisers plan product lines. Designers conceptualize new designs and make prototypes. Factories are sourced and samples are made. Buyers and merchants review new fashion products at markets and shows. Demand assessment for products informs the planning and feasibility process. Manufacturers will then outsource mass production internationally or domestically. Activities include production feasibility, sourcing, patternmaking, sample-making and grading.

Quick response and fast fashion uses inventory and sales tracking technologies to make adjustments or customize designs based on customer specifications or trends. This recent advancement within the industry leverages many of Washington's strengths in software and information and communications technology to integrate value chain components in the Fashion and Apparel Industry Cluster.

Strengths and Opportunities

Local designers with international acclaim. Seattle, in particular, is home to designers that represent a broad range of styles. Some attract international clientele to Seattle for custom designs. Others lead production of styles mass produced that are sold at retailers throughout the world.

International retailers borne from Washington companies. Nordstrom, REI, Eddie Bauer, Filson and several others have grown from local Seattle businesses to be worldwide brands. Several reflect the Pacific Northwest's outdoor and recreational opportunities.

Washington State University Department of Apparel, Merchandising, Design and Textiles. Among Washington's multiple, high-caliber fashion and apparel institutions, Washington State University leads with its industry research and bachelor's and master's degree programs. The Department of Apparel, Merchandising, Design, and Textiles at WSU has nationally and internationally recognized faculty doing research and publishing articles in areas such as fit and sizing issues, alignment with business and industry, textile sciences, consumer behavior, special needs design, economic development, and cultural heritages. As an example of WSU's commitment to being an academic leader in fashion and apparel innovation, it possesses a body scanner. WSU is the only public academic institution in WA offering undergraduate and graduate degrees in Apparel Design and Merchandising. Washington Cluster Strengths

The opportunities for growing the Fashion and Apparel Industry Cluster in Washington stem from the following strengths.

Trade schools and college programs. Several Washington community college and trade school programs infuse the Fashion and Apparel Cluster with highly skilled entry-level talent. Industry leaders speak highly of Seattle Central Community College's technically-oriented Associate of Applied Science degree program. The International Academy of Design and Technology (IADT) offers an Associate of Applied Science and Bachelor of Fine Arts in Fashion Design. The Seattle Art Institute offers associates and bachelor degree programs in fashion design and fashion marketing. The University of Washington Retail Management Program provides a certificate option for undergraduate students, and provides specialized curriculum in retail technology, customer service and market expansion.

Technology, Innovation and Adaptation. Trends in the Fashion and Apparel Cluster are converging in software and Internet technologies, which lead to clear connections to our region's strengths in software design and Information and Communication Technology. Interviews conducted for this study point to software and related technology innovations for the Cluster, though few mentioned local technology companies driving this convergence. Given the region's prominence in technology, partnering with local designers to innovate in the Fashion and Apparel Cluster present opportunities to combine our region's strengths.

MEASURES AND IMPACTS

Industry and Occupation Definitions

Measuring impacts using existing data require use of industry and occupations group codes established by government agencies and data providers. Industry and occupational codes are used to define the Washington State Fashion and Apparel Cluster and inform quantitative analysis of Cluster impacts. This report looks at the Cluster from industry leaders' perspectives and demonstrates the linkages that go beyond the rigid definitions provided by established economic codes.

Industry Definitions

North American Industrial Classification System (NAICS) codes are used to quantify Cluster workplaces, jobs, wages, taxable retail sales, and gross business revenues.

Industry codes and analysis are organized and presented based on five general Cluster segments:

- Apparel Design and Manufacturing
- Apparel Wholesale
- Apparel Corporate Headquarters
- Apparel Retail

Apparel Design and Manufacturing

- Textile mills (NAICS 313)
- Apparel manufacturing (NAICS 315)
- Footwear manufacturing (NAICS 3162)
- Jewelry manufacturing except costume manufacturing (NAICS 339911)

Apparel Wholesale

- Apparel and piece good merchant wholesalers (NAICS 4243).

Corporate Apparel Headquarters is defined as corporate headquarters dedicated to management of apparel retail operations. Estimates are supported through custom data requests based on NAICS 55

Apparel retail

- Clothing stores (4481),
- Shoe stores (4482) and
- Jewelry, luggage and leather goods stores (4483).

Occupational Definitions

Occupational codes defined by the US Bureau of Labor Statistics are used to further analyze the Fashion and Apparel workforce. Occupational codes include:

- Fashion Designers
- Textile manufacturers
- Dressmakers, custom sewers and tailors
- Textile manufacturers
- Hand Sewers
- Sewing Machine Operators

BLS occupational codes are not inclusive of all occupations that work in the Fashion and Apparel Cluster. BLS does not include codes or data specific to the Fashion and Apparel Industry for occupations such as such as management or logistics that are employed across several different industries. The following occupations are analyzed using primary data sources such as industry interviews and surveys when possible.

- Wholesale & Retail Buyers
- Marketing and Sales
- Merchants
- Logistics and distribution
- Sourcing and supply chain
- Management

Firms

Employment Establishments

State employment records indicate there were 1,540 fashion and apparel establishments in Washington State in 2009 (**Exhibit 4**). This includes 350 establishments dedicated to apparel manufacturing, wholesale and headquarters and 1,190 apparel retail stores statewide.

There are 1,030 fewer Cluster employers in Washington State in 2009 than 2000, near a peak employment in the state, a net change of 40% (-6% annual decline). The apparel manufacturing and wholesale sector lost 220 firms (40%). Apparel retail firms declined by 810 statewide (40%).

Apparel manufacturing and wholesale firms also declined in Puget Sound from 2000 – 2009 (70 firms, 23%). The region added 360 apparel retail stores.

Trends indicate that firms downsized from 2000 to 2009. The average number of jobs per firm in the region declined from 16.6 in 2000 to 12.1 in 2009.

Top employers are known to include the following, though employment data by firm were not available:

- Nordstrom
- Eddie Bauer
- REI
- Zumiez
- Tommy Bahama
- Cutter and Buck
- Outdoor Research
- Brooks Sports
- Union Bay
- ExOfficio
- Filson
- Helly Hansen
- SanMar
- High 5 Sportswear
- Shah Safari
- Costco (apparel)
- Cascade Designs

Exhibit 4
Fashion and Apparel Firms by Selected Geography, 2000, 2005, 2009

	Workplaces			Firm Change, 2000 - 2009		
Geography	**2000**	**2005**	**2009**	**Change**	**% Change**	**CAGR**
King County						
Seattle	430	400	400	(30)	-7%	-1%
Eastside Cities	170	180	200	30	18%	2%
Other King Co Cities	250	280	360	110	44%	4%
King County	850	870	970	120	14%	1%
Puget Sound	1,240	1,330	1,530	290	23%	2%
Washington State	2,570	1,520	1,540	(1,030)	-40%	-6%

Source: Community Attributes, Puget Sound Regional Council, Washington State Employment Security Department (2010).

Non-Employers

In addition, Washington includes approximately 3,150 non-employer firms in the Fashion and Apparel cluster (**Exhibit 5**).

The non-employer establishments are concentrated in independent clothing sellers, with more than 1,160, many of whom most likely sell at public markets and small retail stalls at retail centers. Nearly 700 apparel manufacturers and nearly 450 wholesalers in 2008, most likely include the many designers and innovators working independently to sell to larger suppliers and retailers.

The 3,150 non-employer firms from 2008, combined with the 1,540 employment establishments, bring the state's total up to 4,690 firms and establishments in Cluster's core sectors.

Exhibit 5
Non-Employer Firms in Fashion and Apparel Core Sectors, 2008

	Non-Employer Firms
Clothing stores	1,161
Apparel manufacturing	695
Apparel, piece goods, and notions merchant wholesalers	443
Textile product mills	86
Shoe stores	50
Textile mills	38
Jewelry, luggage, and leather goods stores	664
Footwear manufacturing	12
Total Fashion and Apparel Industry Core Sectors	**3,149**

Source: U.S. Census (2010).

Employment

Employers in the Fashion and Apparel Cluster directly provide more than 22,300 jobs in the Puget Sound Region (2009) and more than 30,400 jobs statewide, the majority of which are in retail (**Exhibit 6**).

Apparel design, manufacturing, wholesale and corporate headquarter sectors provide 7,570 jobs in the Puget Sound Region (34% of industry employment) and 8,430 jobs statewide (28% of industry employment). Apparel retail sectors provide 14,470 jobs in the region and 22,000 jobs statewide.

Statewide employment declined by approximately 5,500 jobs from 2000 to 2009, a net loss of 15% of the industry's employment base. (2% annual decrease in jobs). Apparel design, manufacturing, wholesale and headquarters lost 3,820 jobs, while apparel retail sectors shed 1,680 jobs.

National apparel headquarters located in the Puget Sound region provide 3,810 jobs, which include a range of design, administrative, and management occupations. Headquarter jobs account for 17% of industry employment in the Puget Sound region and 13% statewide. Headquarter jobs in the region decreased by a total of 20% (2% annually) from 2000 to 2009. Statewide and national apparel headquarter job estimates were not available.

Design and manufacturing sectors account for 7% of industry jobs, and decreased by the largest amounts and percentages. In 2009, there were 56% fewer manufacturing and design jobs statewide than in 2000. The state lost 2,670 jobs while the region lost 1,610 jobs during this time.

National apparel manufacturing jobs also declined. US apparel manufacturing jobs decreased from 870,000 in 2001 to 337,000 in 2009, a net loss of 61% of the total manufacturing workforce.

Apparel wholesale jobs account for 8% of the state's fashion and apparel jobs. Washington apparel wholesale experienced slight job declines of 1% per year from 2000 to 2009. National apparel wholesale jobs declined by 1.4% per year from 2001 to 2009.

Apparel retail jobs remained stable in Puget Sound region but declined slightly in Washington State. Fashion and apparel retail jobs in the region accounts for two-thirds (72%) of apparel retail jobs in Washington.

Non-employers make up an additional 4,000 jobs, based on 2008 estimates by the U.S. Census. Approximately 2,300 are sole proprietors, and an additional 900 non-employer partnerships and corporations represent an estimated 1,700 more jobs.

Together with the employment establishments, the non-employers bring the total direct employment cluster up to 34,500 jobs in 2009 (with non-employers' 2008 data included).

Exhibit 6
Fashion and Apparel Employment Trends by Cluster Segment Region and State, Selected Years[1]

					Employment Change, 2000 - 2009		
Apparel Jobs by Segment	**2000**	**2005**	**2009**	**% of Total**	**Change**	**% Change**	**CAGR**
Puget Sound							
Design and Manufacturing	3,220	1,800	1,610	7%	(1,610)	-50%	-7.4%
Wholesale	2,460	2,240	2,150	10%	(310)	-13%	-1.5%
Headquarters	4,780	3,930	3,810	17%	(970)	-20%	-2.5%
Non-Retail Subtotal	10,460	7,970	7,570	34%	(2,890)	-28%	-3.5%
Retail	14,520	16,120	14,740	66%	220	2%	0.2%
Total	**24,980**	**24,090**	**22,310**	**100%**	**(2,670)**	**-11%**	**-1.2%**
Washington State							
Design and Manufacturing	4,810	2,820	2,140	7%	(2,670)	-56%	-8.6%
Wholesale	2,660	2,440	2,480	8%	(180)	-7%	-0.8%
Headquarters	4,780	3,930	3,810	13%	(970)	-20%	-2.5%
Non-Retail Subtotal	12,250	9,190	8,430	28%	(3,820)	-31%	-4.1%
Retail	23,680	24,530	22,000	72%	(1,680)	-7%	-0.8%
Total	**35,930**	**33,720**	**30,430**	**100%**	**(5,500)**	**-15%**	**-1.8%**

Non-Employer Jobs by Segment	**2008**	**% of Total**
Design and Manufacturing	900	22%
Wholesale	500	12%
Retail	2,630	65%
Total Non-Employer	**4,030**	100%
Total Fashion and Apparel Jobs	**34,460**	

Source: Community Attributes, Puget Sound Regional Council, Washington State Employment Security Department (2010).

[1] Apparel Design and Manufacturing job estimates are based on the following NAICS classifications: Textile mills (313), Apparel manufacturing (315), Footwear manufacturing (3162), Jewelry manufacturing except costume manufacturing (339911). Wholesale job estimates are based on the following NAICS classification: Apparel and piece good merchant wholesalers (4243). Headquarter job estimates include jobs at apparel headquarters located in Puget Sound only; 2000 and 2005 estimates were not available at the time of this draft. Apparel retail job estimates are based on the following NAICS classifications: Clothing stores (4481), Shoe stores (4482) and Jewelry, luggage and leather goods stores (4483).

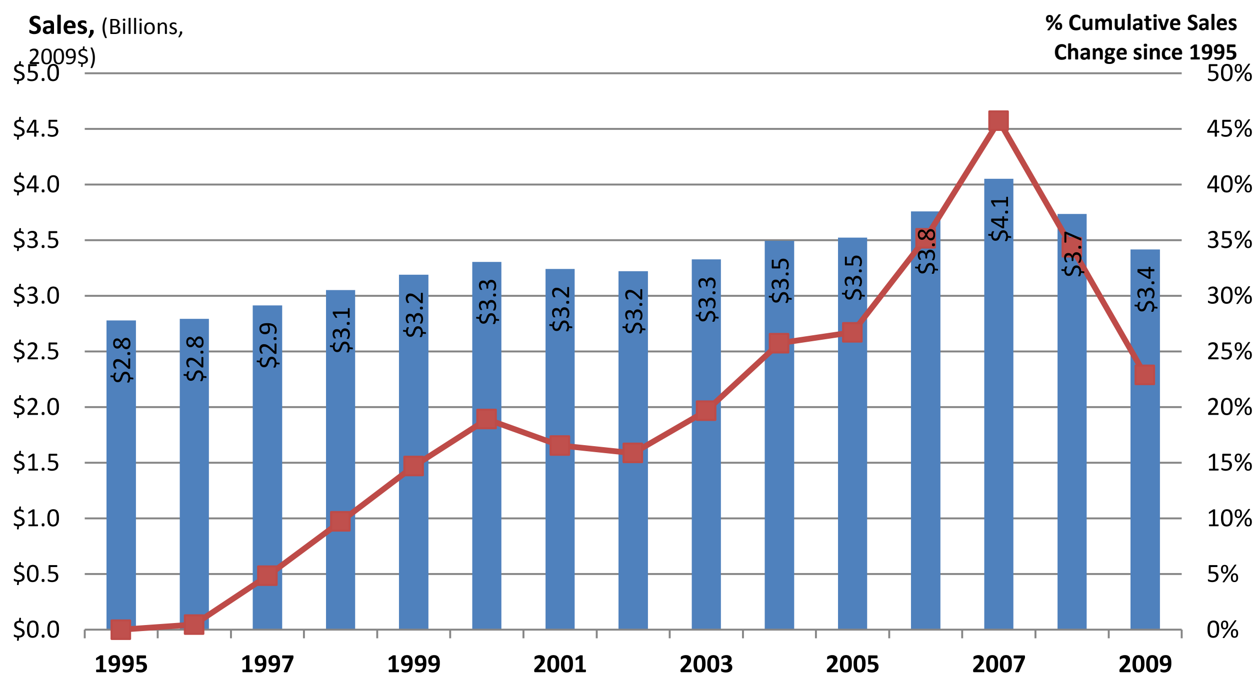
Taxable Retail Sales

Exhibit 7 presents annual apparel-related retail sales in Washington State from 1995 to 2009 and cumulative percentage change in sales since 1995.

Retail sales closely follow other key indicators of the Washington economy, such as unemployment, property values and wages. During the dot.com boom from 1995 to 2000, retail sales increased each year, from $2.8 billion in 1995 to $3.3 billion in 2000. Sales dipped in the early 2000's following the dot.com bust, and grew again to peak in 2007 at $4.1 billion.

The industry experienced a 20% drop in sales from 2007 to 2009 during the economic recession. Retail sales in 2009 totaled $3.4 billion. Fashion and apparel retail sales have grown by a total of 23% since 1995, or 1.5% annually.

Exhibit 7
Apparel Taxable Retail Sales, Washington State, 1995 – 2009 (Inflation-Adjusted)



Source: Washington Department of Revenue (2010).

Revenues

The Washington State Fashion and Apparel Industry generated an estimated $8.3 billion in revenues in 2009 (**Exhibit 8**). Retail sectors produce approximately 60% of the revenues. Apparel manufacturing and wholesale sectors produce approximately $3.2 million in revenues.

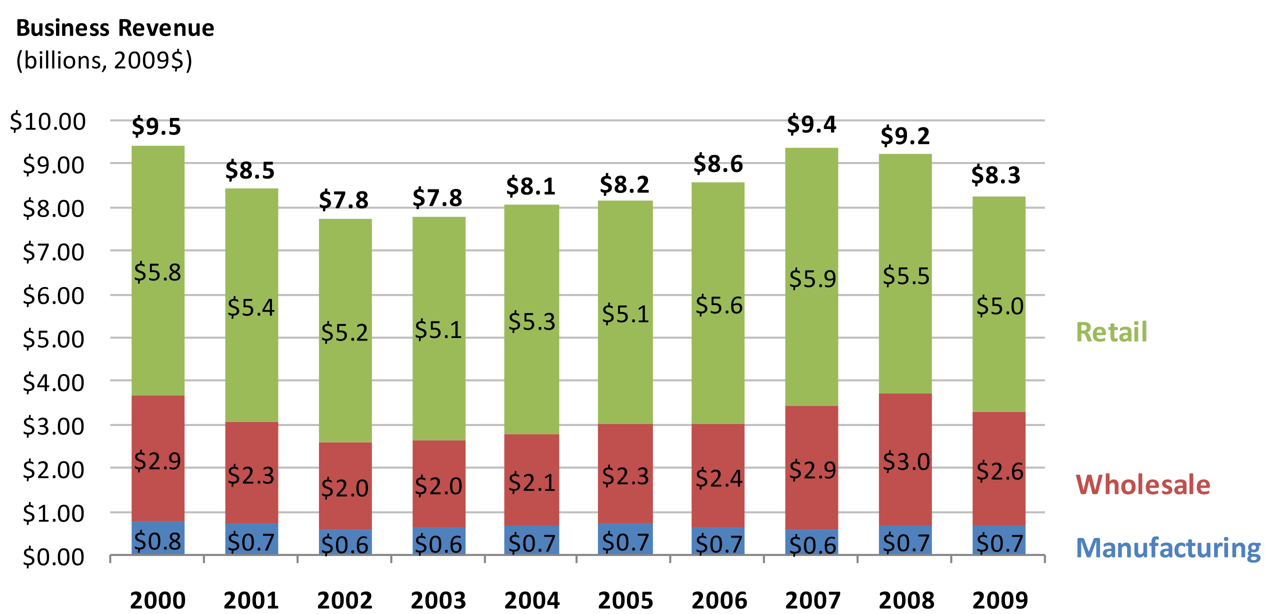
Fashion and Apparel Industry revenues declined by 1.5% annually from 2000 to 2009 while taxable retail sales grew by 0.4% annually.

Revenues peaked in 2000, at $9.5 billion and declined to $7.38 million in 2002. Revenues peaked again at $9.4 billion in 2007. Revenues declined by nearly 16% from 2007to 2009 as a result of the economic recession.

Gross business revenues differ from taxable retail sales in apparel due to out of state sales and exemptions to certain buyers, such as military and other government spending.

Exhibit 8

Fashion and Apparel Business Revenues, Washington State, 2000 – 2009 (Inflation-Adjusted)



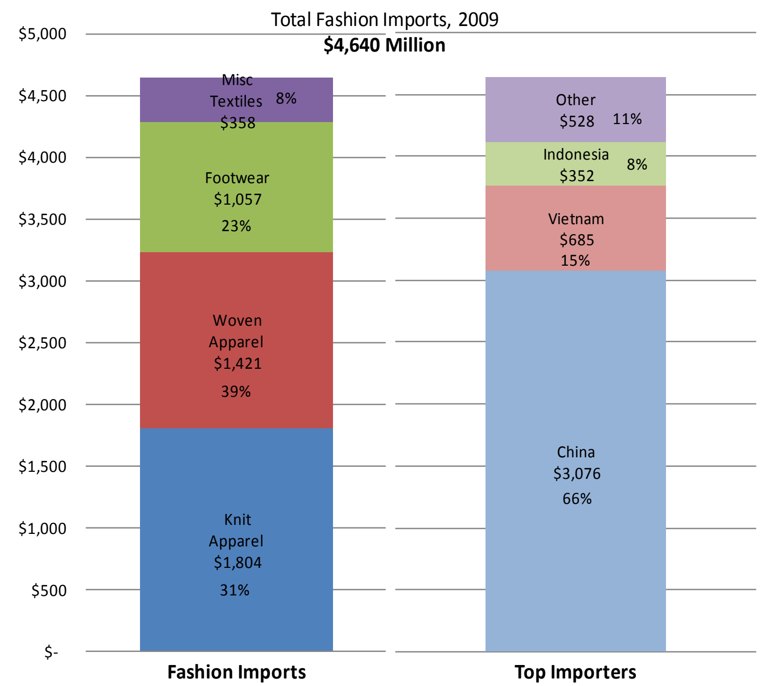
Source: Washington Department of Revenue (2010).

International Trade

International trade has played an increasing large role in the Fashion and Apparel Industry as firms strive to minimize costs, maintain profit margins, and maximize value for consumers. In 2009, the Port of Seattle reported $4.6 billion in waterborne freight imports directly related to the Fashion and Apparel (**Exhibit 9**).

Knit and woven apparel accounted for nearly 70% of imports ($3.2 billion). China was the number one importer of apparel goods to the Port of Seattle, for national distribution. China accounted for 66% or $3.1 billion in Seattle fashion and apparel imports. Vietnam and Indonesia are also top apparel importers.

Exhibit 9
Port of Seattle Fashion and Apparel-Related Imports and Top Importers, 2009



Source: Port of Seattle, U.S. Census Bureau, U.S. Department of Commerce (2010).

Statewide Impacts

The Fashion and Apparel Industry has full impacts, including direct, indirect and induced impacts that total $16.4 billion in revenues, 51,700 jobs and $2.1 billion in labor income in Washington (**Exhibit 10**), derived from 2009 estimated revenues and employment.

Economic impacts are based on the Washington State Department of Revenue's 2008 Input-Output model, which uses job and revenue estimates presented above.[2]

Economic impacts of the Washington Fashion and Apparel Industry fall into two categories: impacts created by apparel design, manufacturing, wholesale and headquarters, and impacts created by apparel retail sales.

Design, manufacturing, wholesale and apparel corporate headquarters (including only the corporate office component of retailers) impacts represent the impact of Washington State companies on the Washington State economy. Retail impacts represents impact of state, national and international apparel retail firms on the state economy.

Design, manufacturing, wholesale and headquarter segments of the industry generate a total of $6.7 billion in revenues, 17,200 jobs and nearly $800 million in labor income. Retail sales impacts generate a total of $9.7 billion in gross revenues statewide, 34,500 jobs and $1.2 million in labor income.

Exhibit 10
Statewide Economic Impacts of Fashion and Apparel Industry

	Total Revenue ($ billions)	Total Jobs	Total Labor Income ($ billions)
Direct Impacts			
Design, Manufacturing, Wholesale, HQ, and Self-Employed	$3.3	9,830	$0.5
Retail Sales	$5.0	24,630	$0.8
Total	$8.3	34,460	$1.3
Indirect and Induced Impacts			
Design, Manufacturing, Wholesale, HQ, and Self-Employed	$3.3	7,400	$0.3
Retail Sales	$4.7	9,800	$0.4
Total	$8.0	17,200	$0.7
Total Impacts			
Design, Manufacturing, Wholesale, HQ, and Self-Employed	$6.7	17,230	$0.8
Retail Sales	$9.7	34,430	$1.2
Total Fashion and Apparel Industry	**$16.4**	**51,660**	**$2.1**

Source: Community Attributes, Washington State Department of Revenue (2010).

Note: Analysis reflections revisions from draft data published showing the total impact to be $13.1 billion in revenue and 45,000 jobs.

[2]Statewide economic impacts from business spending and employee wages were analyzed using the 2008 Washington State Input-Output Model maintained by the Washington State Department of Revenue. Model output was based on the model's "Simple Analysis" module. Employment estimates were used to estimate total job impacts, revenues were used to estimate revenue and labor income impacts. The DOR's model maps statewide spending among businesses and by consumers based on economic linkages observed from 2004 data. For this study, model output was adjusted for inflation to 2009 dollars.

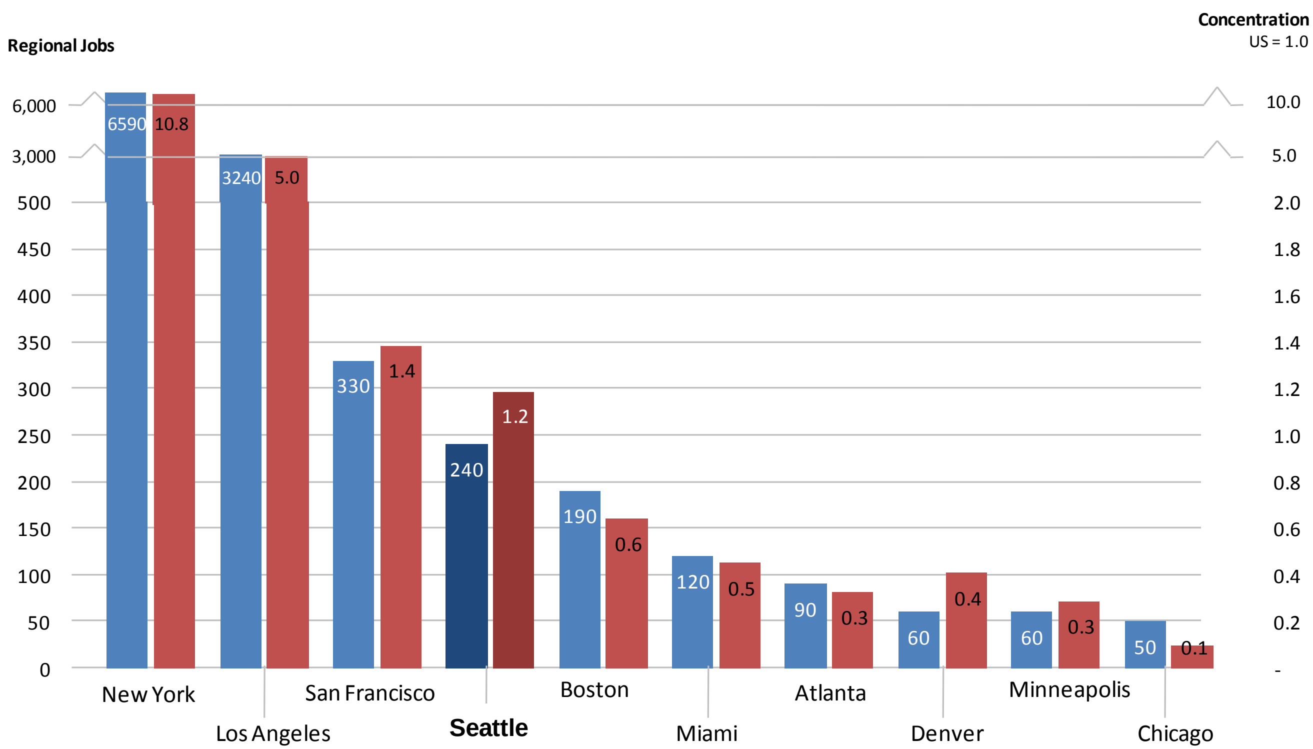
WORKFORCE ASSESSMENT

Competitive Occupations

Seattle shows competitive concentrations of fashion and apparel talent. **Exhibit 11** shows the number and concentration (relative to the nation 1.0) of fashion designers. Designers are highly concentrated in New York and Los Angeles. New York has 10 times as many designers than the national average; Los Angeles has 5 times the national average.

Seattle has 240 fashion designers (2009) as defined by occupation codes, ranking second among second tier regions. Designers are 20% more concentrated in Seattle than the rest of the nation.

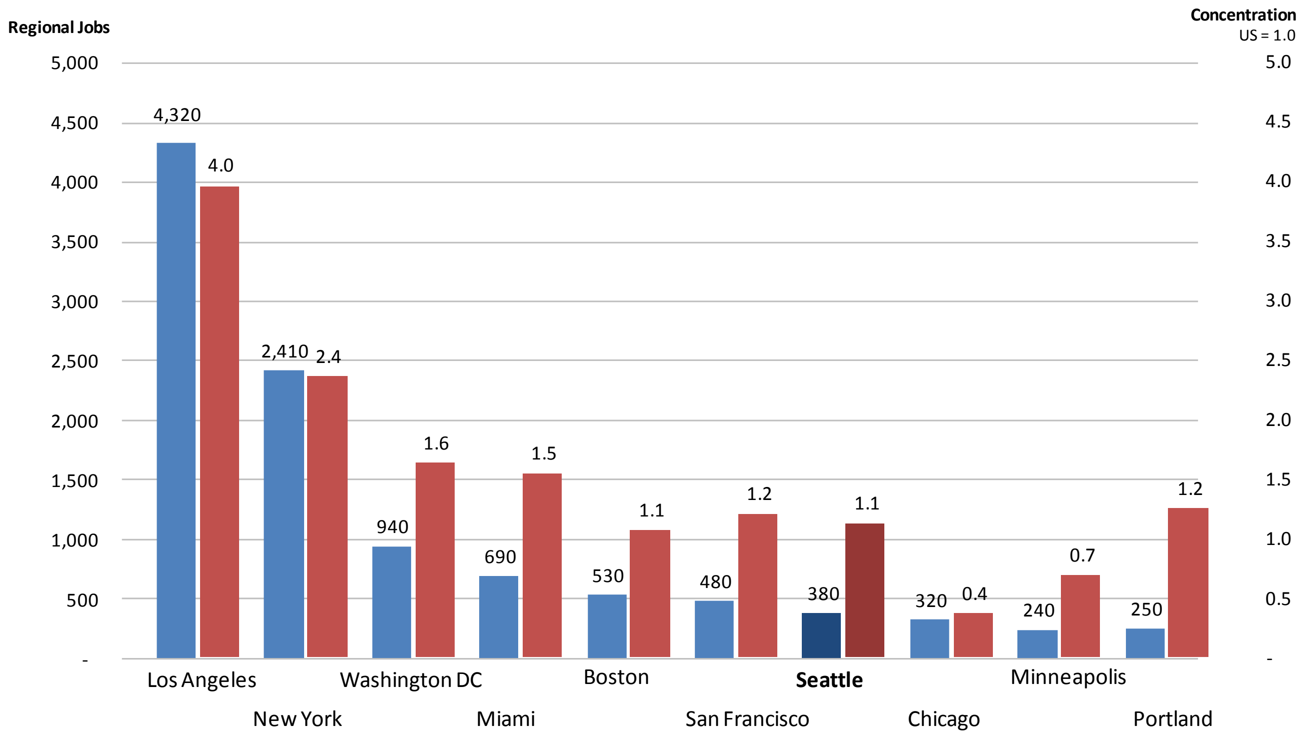
Exhibit 11
Number and Relative Concentration of Fashion Designers, Select MSAs, 2009



Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (2010).

Seattle has above average concentrations of fashion and apparel manufacturing talent, which include dressmakers, custom sewers, and fabric and apparel pattern-makers (**Exhibit 12**). Fashion manufacturing is concentrated in Los Angeles and New York, together the regions account for approximately 20% of the nation's fashion and apparel manufacturing jobs.

Exhibit 12
Number and Relative Concentration of Fashion Manufacturing Occupations[3]
Select MSA, 2009



Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (2010).

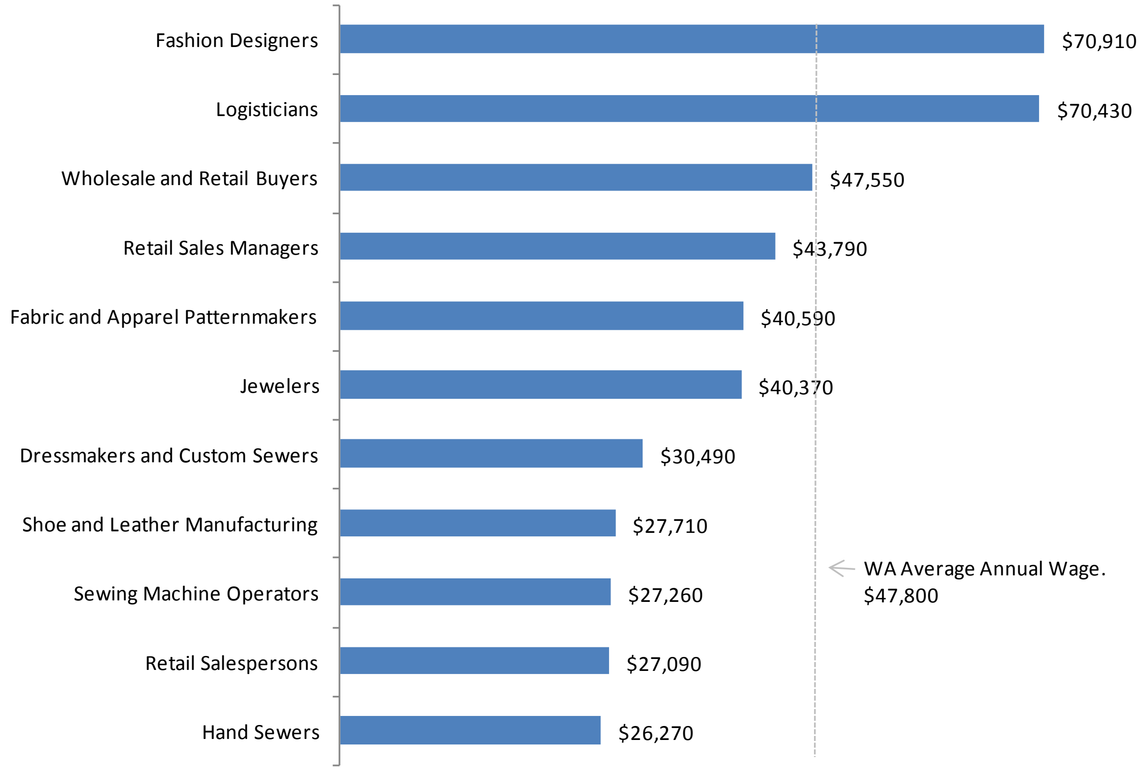
[3] Manufacturing occupations include Dressmakers, Custom Sewers, and Fabric and Apparel Patternmakers. Data shown here are not inclusive of all fashion manufacturing occupations

Wages by Occupation

Wages vary by occupation in the Seattle region (**Exhibit 13**). Among selected occupations, fashion designers and logisticians, top the pay scale at over $70,000 annually (wages for fashion executives were not readily available).

Most fashion and apparel occupations pay below the State average wage ($47,800 in 2009). Production occupations such as sewers make less than $30,000 annually. Retail clerks account for a significant portion of retail jobs, and they make approximately $27,000 annually, on average.

Exhibit 13
Fashion and Apparel Industry Wages by Occupation, Seattle MSA, 2009



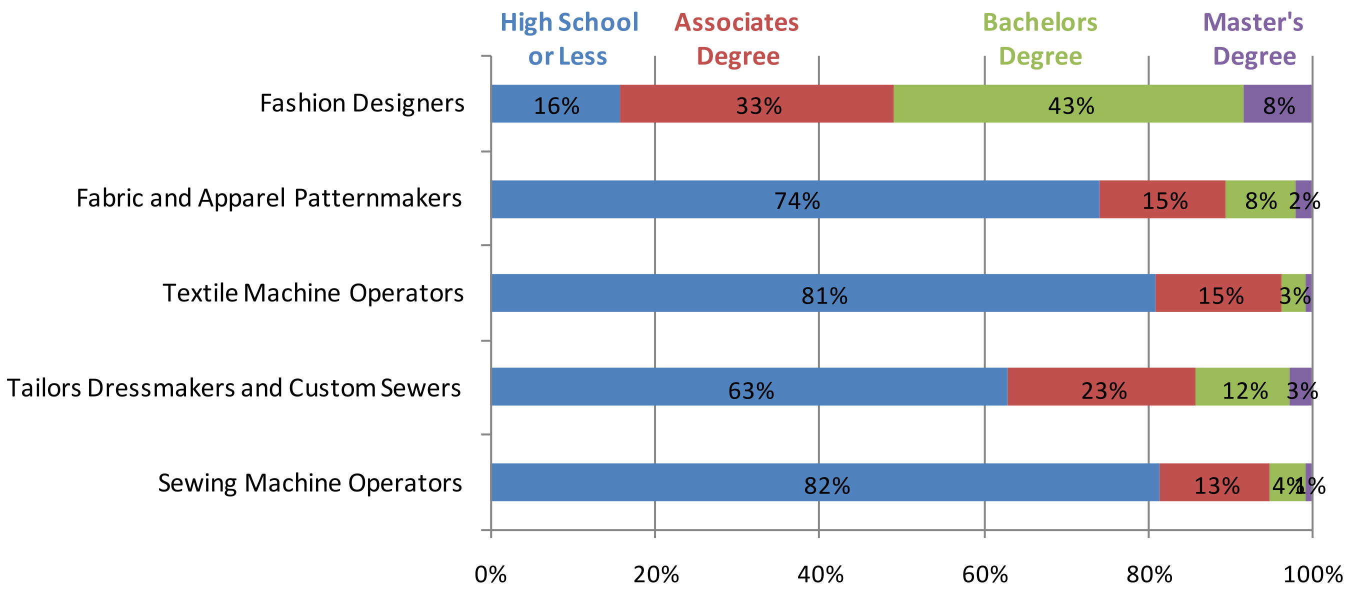
Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (2010).

Educational Attainment

The fashion and apparel industry is placing a greater and increasing emphasis on educational attainment (as described in greater detail in the next section on interview findings).

Exhibit 14 shows nationwide educational attainment among select fashion and apparel occupations. More than half of fashion designers have a bachelor's degree or higher. The majority of nationwide production occupations including patternmakers, textile machine operators, and sewing workers typically do not have a college education.

Exhibit 14
Fashion and Apparel Workforce Educational Attainment, Select Production Occupations, Nationwide



Source: U.S. Bureau of Labor Statistics (2010).

Exhibits 15 and **16** show educational requirements for various fashion and apparel occupations, based on a survey of local industry professionals.

The majority of fashion and apparel design occupations require fashion school certificates or bachelor degrees. Business support service occupations such as marketing, buying, logistics, sourcing, and management all generally require a four year college degree. Washington manufacturing occupations also emphasize higher education, and higher educational attainment than national averages.

Exhibit 15
Percentage of Jobs that Require Fashion School or Certificate Program, Select Activities

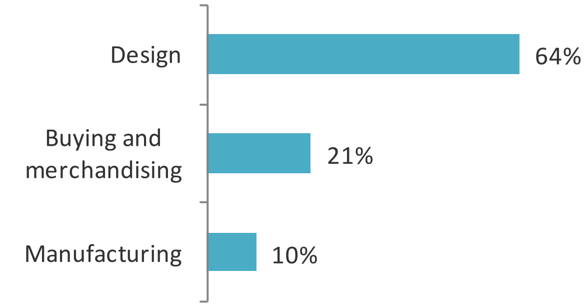
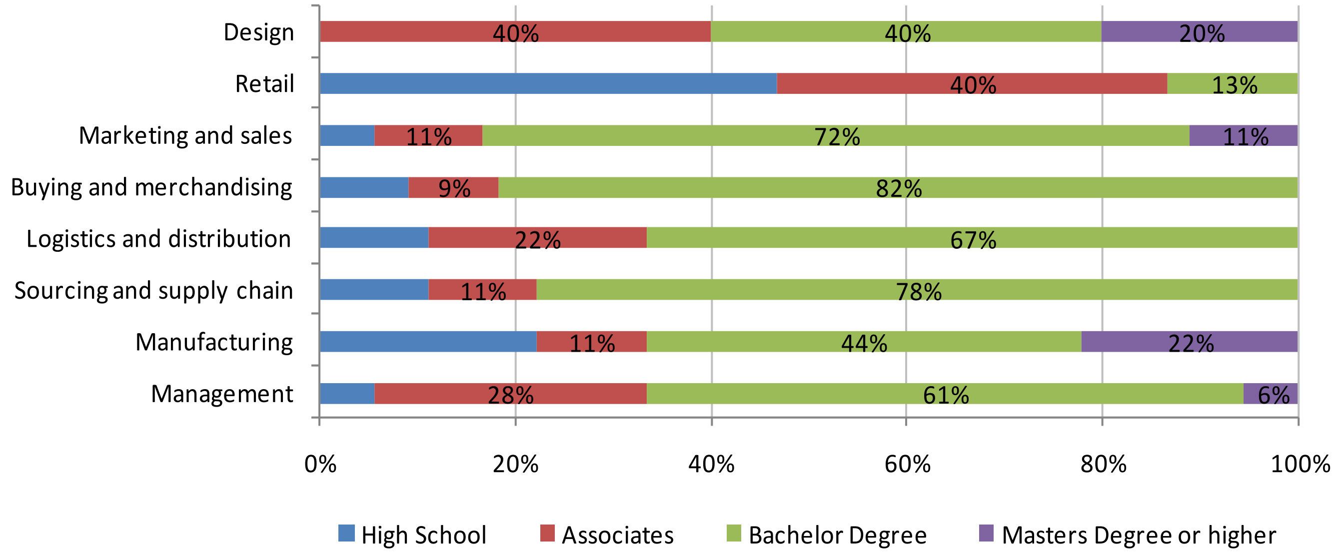


Exhibit 16
Fashion and Apparel Workforce Educational Requirements, Washington State



Source: enterpriseSeattle Fashion Survey (2010).

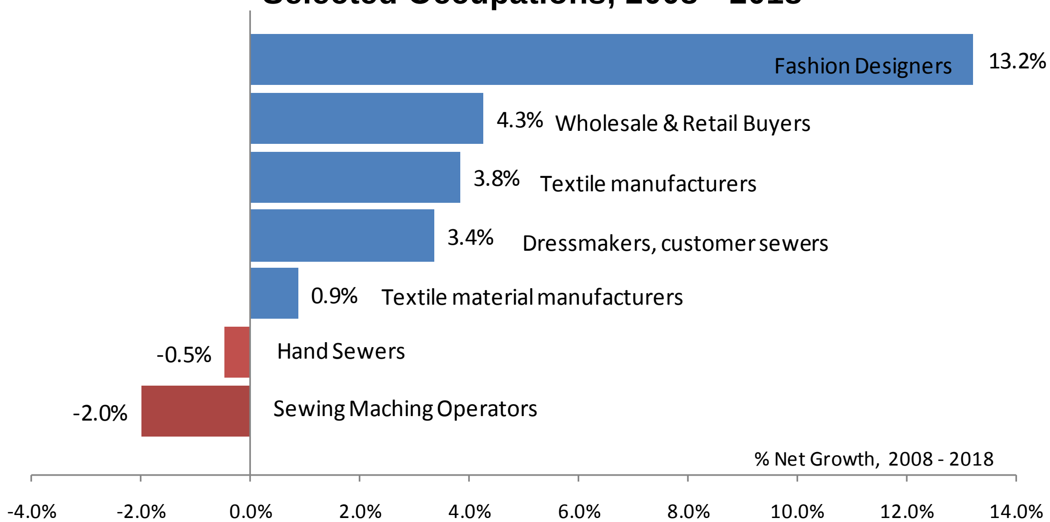
Near-Term Employment Outlook

Statewide forecasts indicate that the Washington Fashion and Apparel Industry offers near-term growth potential. **Exhibit 17** shows statewide projected growth rates for fashion and apparel occupations from 2008 to 2018.

Fashion designers are forecasted to grow by a total of 13% from 2008 to 2018, or 1.3% per year. Nearly 20 annual statewide job openings for fashion designers are projected. Some manufacturing positions such as textile workers and custom sewers are forecasted to increase while others such as hand sewers and sewing machine operators are forecasted to decline.

Interviews with industry leaders suggest that sewing occupation jobs will grow in the future, due to increases in international labor costs and higher demand for higher quality, locally produced apparel. Local business owners also indicated that demand for management, product development and sourcing and supply chain occupations will grow.

Exhibit 17
Washington Fashion and Apparel Occupational Growth Projections, Selected Occupations, 2008 - 2018[4]



Source: Washington State Employment Security Department, 10 Year Occupational Employment Projections (2010).

[4] Occupational projections are based on occupational employment codes defined by the Bureau of Labor Statistics. Occupations shown in Exhibit 14 are not inclusive of the Fashion and Apparel Industry. Occupational codes for management, sourcing and supply chain and other occupations are available for all economic sectors, but not available specifically for the fashion industry.

INTERVIEW FINDINGS

The following presents key findings from interviews and a roundtable discussion form with industry leaders, as well as outcomes of the enterpriseSeattle fashion and apparel survey. See **Appendix A** for a complete list of companies interviewed.

Opportunities

- Seattle fashion and apparel businesses leverage new technologies and applications to boost sales, expand internationally and streamline production processes.

- **New technologies are transforming production processes.** Software advances support "fast fashion," and allow designers, retailers, producers and logisticians to dynamically respond to trends to maximize retail value and sales. Software applications span Cluster needs in communication, inventory and supply chain management.

  Mass customization technologies allow customers define clothing to their exact specifications. 3-D modeling, engineering software, and advanced materials testing and production has improved quality, lowered production costs, and reduced production times.

- **E-Commerce technologies and online sales networks have and will continue to be a major growth opportunity for fashion and apparel businesses.** Large and small businesses alike have used online sales and marketing channels to expand their customer base from a local to global market. Direct online sales allow wholesalers and small design companies to participate in the retail arena. Large retailers use online sales to prospect new international retail locations.

  Industry leaders state that application of mobile e-commerce technologies and social networking sites are emerging trends that could change the landscape of retailing. Exposure and branding through social media and other online outlets also allows designers and retailers to more efficiently reach their customers and respond to changing trends.

- **Global production challenges are creating domestic opportunities.** Rising international labor and transportation costs are creating opportunities for domestic manufacturers to regain market share in an extremely competitive global market. While consumers are demonstrating increased demand for sustainable and responsibly-produced products, price competitiveness still remains the major hurdle for US apparel and textile manufacturers.

Challenges

- Despite the challenges associated the economic recession of 2008 and 2009, industry leaders expressed optimism that Washington's fashion and apparel industry will emerge stronger and more competitive.

- **Rising international material and labor costs were the top concerns cited by Washington's international apparel businesses.** Growing global demand for cotton and textiles are driving material and labor prices up everywhere. The value and purchasing power of the dollar also remains a mounting challenge.

  Stakeholders state that wage equality, subsidies and declining manufacturing capacity in China and other primary Asian markets pose risks to stable international production operations. Some global companies are moving international operations in search of better value, quality and stability.

- **Financing and lack of support industries are the two most significant hurdles to designers and small business growth**. Many local designers struggle to secure capital for start-up expenses and capital investments. Local production and scalability is further restricted due to the lack of textile, notions, and sewing companies in Washington State.

- **Finding and retaining workforce was a common challenge for both small and large businesses.** Businesses seeking new talent to drive upper-level management and product development positions have trouble finding the right talent in Washington and struggle to recruit from Los Angeles and New York.

  Businesses seeking to grow their support team locally struggle to find trained sewing operators, a quality sales team, and good domestic manufacturing.

Washington's Competitive Advantages

- **Large global businesses support growth in the fashion and apparel industry.** Industry leaders state that global apparel companies such as Nordstrom, Eddie Bauer, and Union Bay as well as global IT companies such as Microsoft and Amazon feed a large talent pool and support a climate of innovation.

- **Washington's fashion and apparel niche is tied to our natural environment and quality of life**. Washington's natural surroundings support a long-time outdoor gear and sportswear apparel niche that has grown into a global industry. Proximity to mountains, ocean and a range of climates create both industry specialization and brand recognition for high performance clothing that can withstand a range of conditions. Outdoor apparel firms site that proximity to a varied geography made it easy for them to test their products, find employees, and reach customers.

- **Washington's natural assets also create an ideal place to live and do business.** Several industry leaders stated that Washington's high quality of life and natural beauty was the reason why their business was located here.

- **Washington's primary competitive assets are proximity to Asia and port infrastructure**. Businesses can more easily access international manufacturers in Washington than in New York and other east coast locations. Port infrastructure allows for efficient transportation of goods. Stakeholders state that the Puget Sound is the hub of the Northwest apparel industry.

Local Barriers to Growth

- **Washington State lacks support industries needed to grow the industry.** Stakeholders cited the lack of essential support industries such as textiles producers, manufacturers, and buyers as the primary barrier to growing local fashion and apparel businesses.

  Stakeholders state that there is a "lack of the underpinnings of the industry" and that "the support industries are gone, and materials have to come from elsewhere", referring to other places in the U.S. and abroad where supply stores are found.

- **Location challenges domestic logistics and transport.** Large companies cited long distances to customers on the east coast and in the south as a primary disadvantage of doing business in Washington State. Apparel wholesale stakeholders stated that distributors in the east and southern portions of the US have a competitive advantage over northwest distributors due to lower time and shipping costs.

  Large businesses in particular emphasized that efficient and predictable Port customs coupled with low cost, over-night carriers are essential for transporting their products to the East Coast, southern California, and Texas.

Technologies and Innovations

- **Technology is growing the local industry but may not grow jobs.** Industry leaders suggest that technology innovations will lead to job growth in the United States, including a reversal of some of the outsourcing that defined the industry in past years. Technology innovations can improve efficiency and reduce costs by reducing labor needs through automation. In this respect, stakeholders suggest that future local economic impacts may be better measured in terms of local production revenues rather than jobs.

  Innovations in e-commerce, mass customization, supply chain management, and communication have helped reduce costs, save time, and boost revenues.

Workforce Trends and Outlook

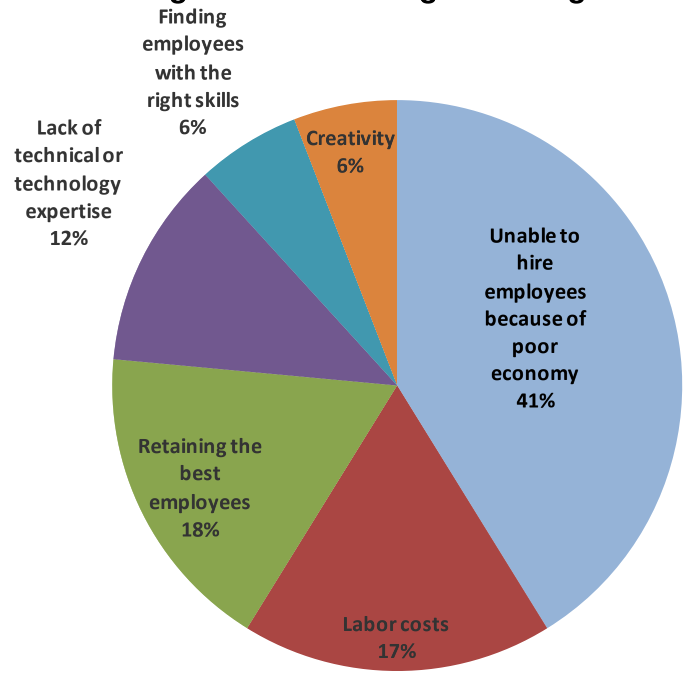
- **Job growth depends on increased sales and economic recovery.** Over 40% of companies surveyed cited the economy as their most significant staffing challenge (**Exhibit 18**).

- **Employers find value in training entry level talent over hiring experienced workers.** Business owners state that retaining the best employees is critical to sustaining and driving growth while re-capturing workforce investments. Several employers state that they hire and train entry level employees rather than hiring more experienced more costly laborers. Entry level employees that excel at their duties have opportunities to advance to more senior level positions.

- **Labor costs are a multi-faceted challenge**. Interviewees and survey respondents state that rising international labor costs is one of the most significant challenges facing the industry. Stakeholders also emphasize that high domestic labor costs in Washington and the US, limits the competitiveness and feasibility of domestic apparel manufacturing. Labor costs also relate to attracting and retaining employees. Local businesses state that hiring more experienced employees is often cost prohibitive. Business owners also struggle to pay living wages to cover the high costs of living in the Puget Sound, or increase wages to compete with compensation from other industries.

- **Technical and business skills are needed**. When asked what skills were in highest demand within the fashion and apparel industry, independent designers emphasized technical skills while larger apparel companies emphasized business skills. Technical skills in demand include sewing and pattern making and grading. Larger companies cited need for business skills such as work ethic, quick learning, "people skills", and customer service.

Exhibit 18
Most Significant Staffing Challenges



Source: enterpriseSeattle Fashion and Apparel Survey (2010).

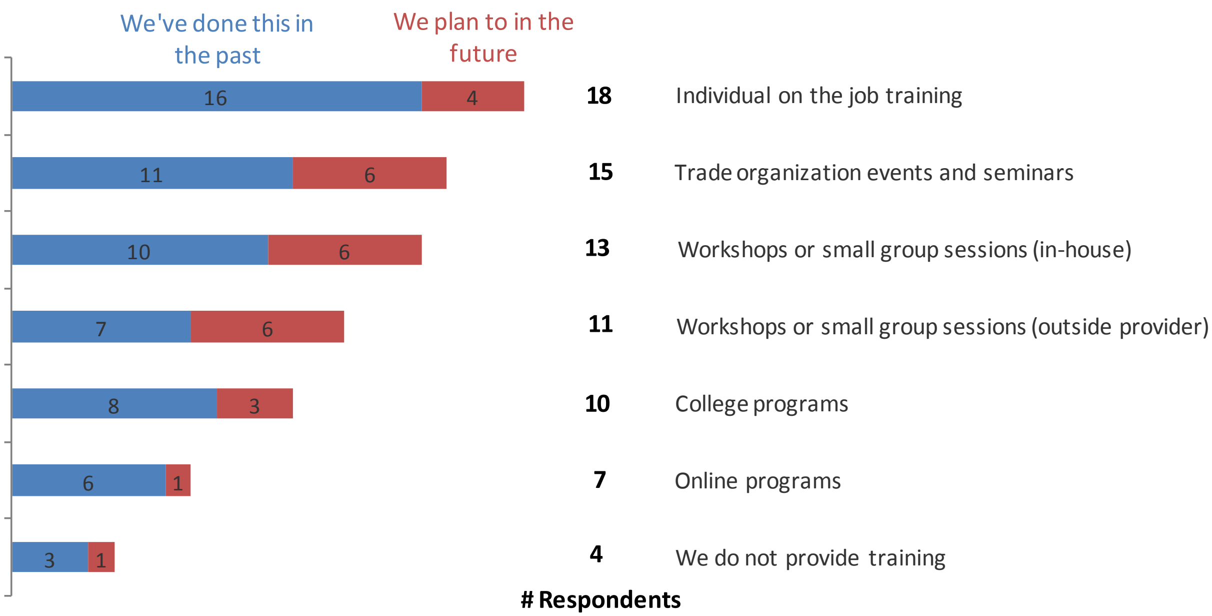
Training and Education

- Industry stakeholders state that the majority of workforce training happens on the job (**Exhibit 19**). Employees are trained on a range of tasks, usually by other more experienced employees or in small groups.

- Trade organization events and seminars, workshops from outside service providers and university programs play an important role in workforce training, especially for designers. Survey participants suggest that workshops and trade organization events will play a larger role in workforce training in the future.

- **Designers and other small business owners cited the need for business training.** Several designers suggested that "business 101" classes focusing on topics such as accounting, management, marketing, and business planning would significantly help grow their businesses.

Exhibit 19
Washington Fashion and Apparel Workforce Training Participation

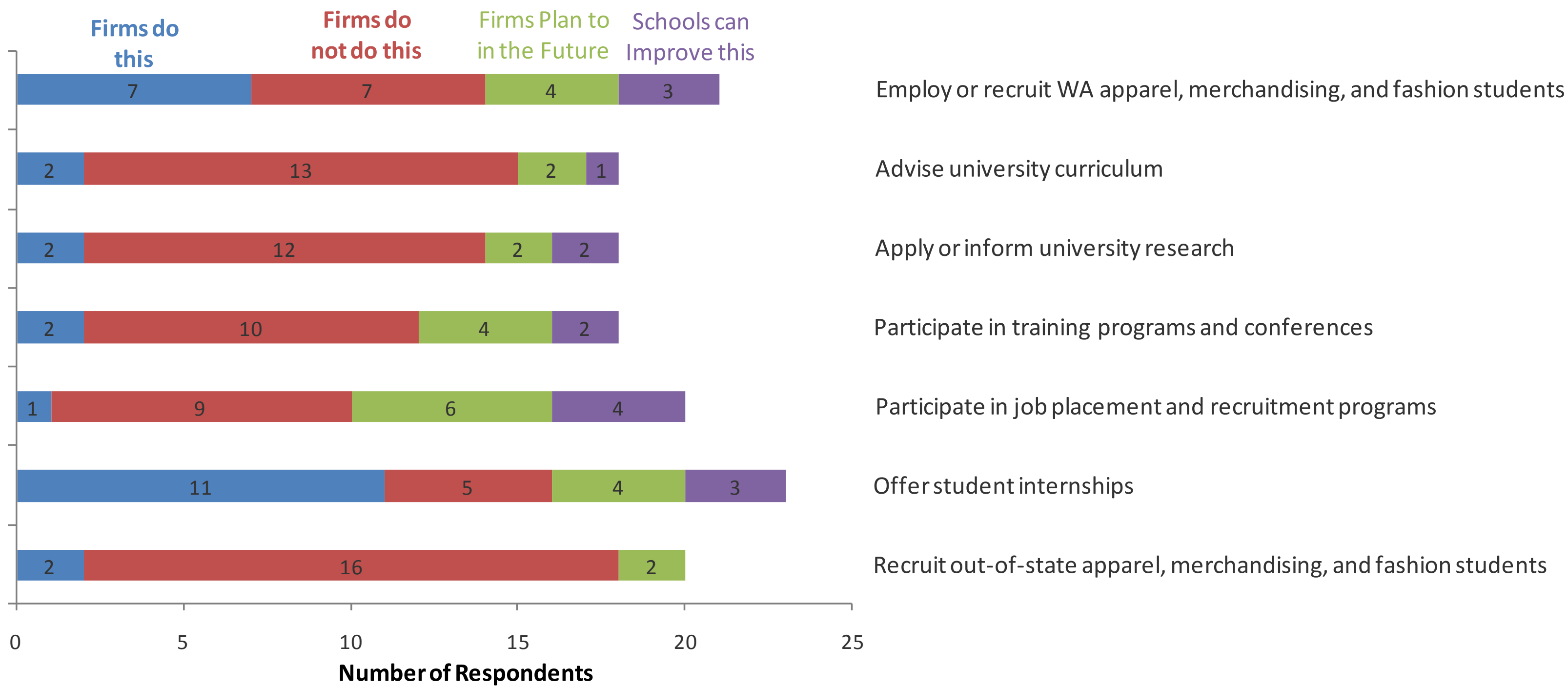


Source: enterpriseSeattle Fashion and Apparel Survey (2010).

- Student internships are the number one university resource that businesses take advantage of (**Exhibit 20**). Businesses suggest that internships are an ideal way to prepare students for the workforce while also infusing essential business skills like time management, work ethic, and professionalism.

- Businesses more actively recruit students from Washington universities than out of state. Firms also cited a greater need for job placement assistance, and suggest that local universities and workforce organizations can help grow the industry by connecting entry level talent to businesses based on specific workforce needs.

Exhibit 20
Business Use of University Resources[5]



Source: enterpriseSeattle Fashion and Apparel Survey (2010).

[5] "University" includes four-year university degree programs as well as community colleges.

Recommendations to Grow the Industry

- Industry leaders identified a range of activities and resources that local governments, trade organizations, and universities can provide to grow the Fashion and Apparel Industry.

- Access to a comprehensive database of fashion, apparel and textile firms, was the most commonly cited recommendation for growing the industry and helping small businesses connect. Networking and industry events were also cited as a way to develop business relationships.

- Fashion incubators could play a key role in providing essential support services to help new and growing businesses. Shared equipment and resources could reduce capital costs. Tools and services such as textile sourcing and buying, notions, marketing, sewing, and manufacturing resources were cited. Incubators could also provide retail space to help designers launch products without costly lease commitments.

- Business leaders recommended that economic development organizations can play a key role in developing "how to" manuals for working with Port customs and logistics, permitting, and taxes. Economic development organizations can also help develop international business relationships and support foreign trade missions.

- A range of industry representatives from CEOs and designers cited opportunities for workforce development organizations, state universities and businesses to work together on training initiatives. Internship and placement programs can help better prepare students for the workforce. Business classes focusing on a range of fundamental activities such as management, accounting, planning, among others can help students, small business owners, and more experienced workers excel. Mentorship programs with industry veterans and up-and-coming designers, was cited as a key to keeping and growing the best talent in Washington.

- Access to capital was a commonly cited impediment to business start-ups. Industry stakeholders identified opportunities to help connect businesses owners to grants, investors, and low cost loans. Industry stakeholders also identified opportunities to reduce the cost of business through tax or financial incentives for creating local jobs or boosting revenues through ecommerce and marketing assistance.

- Industry stakeholders advocate that building the "Seattle brand" is essential to moving the Washington Fashion and Apparel Industry beyond the status quo. Elevating existing fashion shows, bringing in national buyers, and connecting major local retailers with the best local designers were suggested.

SUMMARY

The Washington State Fashion and Apparel Industry Cluster offers assets and opportunities for economic growth in 2010 and beyond.

Washington has long held a strong presence in fashion, apparel and textiles. Global companies have grown from the region's historic strengths in apparel and textile manufacturing and competitive niches in outdoor gear and sportswear.

This mature local industry and related sectors is ready for targeted economic development policy and initiatives that leverage the region's better known strengths in technology and design.

The Washington Fashion and Apparel Industry focuses on creating intellectual property and sourcing production and distributing goods on a worldwide basis. Major national retailers leverage communication, inventory and management software to dynamically respond to trends to maximize retail value and sales.

Washington fashion, apparel and textile companies large and small use ecommerce technologies to sell directly to consumers on a worldwide basis. New social networking and mobile technologies allow retailers to reach and understand their consumers better than ever before. Prominence of social media tools has helped transform the Fashion and Apparel Industry to a consumer-driven industry from a design-retail driven industry.

Technologies also make apparel production processes more competitive in the United States. Mass customization technology allows customers to define clothing to their exact specifications, while 3-D modeling and engineering software helps produce apparel at lower costs and support smaller scale, high-tech apparel manufacturing.

Retaining Washington's best design talent and fashion and apparel entrepreneurs is a key strategy to growing the industry. To grow the Fashion and Apparel Cluster, industry experts emphasize that support industries and resources are needed. Solutions such as fashion incubators can provide tools and resources at low cost, while creating synergy and collaboration within the industry.

Networking resources, access to financing, and international customs and business relations were also suggested. Industry stakeholders also emphasized that educational and training institutions can better prepare students to succeed by integrating business and fashion and apparel education.

APPENDIX A. FASHION AND APPAREL INDUSTRY CLUSTER STUDY PARTICIPANTS

- Art Institute of Seattle
- Beyond Clothing
- Brooks Sports
- Built For Man
- Carole McClellan Design
- Cotton Caboodle
- Deborah Vandermar (IADT)
- Evie Huntington & Associates
- ExOfficio
- Fashion Network Seattle
- Filson
- High 5 Sportswear
- Laura Cassidy/Seattle Met
- Logan Neitzel
- Maria Canada
- Mark Mitchell
- Michael Cepress
- Moving Comfort
- Outdoor Research
- Seattle Fashion Week
- Shah Safari
- Sucre Soir
- Thomas Dean & Co
- Tommy Bahama
- Two Dog Island
- Unique Textiles Experts
- Utilikilts

enterpriseSeattle and Community Attributes wish to thank all the companies and individuals who participated in the study through interviews, the enterpriseSeattle Fashion and Apparel Survey and a roundtable discussion group. We wish to thank Fashion Network Seattle and the Seattle chapter of Fashion Group International for their help in recruiting companies and individuals to take our online survey and to join our roundtable group.

APPENDIX B. ENTERPRISESEATTLE FASHION AND APPAREL SURVEY

Survey Overview and Purpose

Welcome to the enterpriseSeattle Fashion Survey! Thank you for your participation and valuable insight. Your input will help educators and economic specialists better understand what it takes to make Washington State's fashion industry prosper.

The fashion survey is part of a larger Fashion Industry Cluster Study. The study is sponsored by Washington State University, King County Workforce Development Council, and enterpriseSeattle.

The study will document industry trends, opportunities and challenges and will inform statewide economic development and training initiatives. Outcomes of the study and survey will be presented at an industry celebration in October 2010. For more information on enterpriseSeattle and their efforts to grow our economy see: http://www.enterpriseseattle.org/

Thank you!

General Information

This section of the survey collects basic participant and business profile information. Contact information will be used to inform you about the study release date, report, and presentation. Business information is used to add context to other survey answers. Survey results are 100% confidential. Contact and business information is optional.

Contact Information

1. Name
2. Phone
3. Email

Company Information

1. Company Name
2. WA Address
3. HQ Location
4. Additional Locations

Employment Profile

1. Employees
2. Number of Employees in WA
3. Total Number of Employees

Revenue Profile

1. Revenues
2. Gross Revenues of WA Operations
3. Total Gross Revenues

Which of the following best describe your day-to-day job activities? (check all that apply)

- ☐ Management
- ☐ Apparel design
- ☐ Textile design
- ☐ Pattern making
- ☐ Sample making and garment construction
- ☐ Manufacturing (sewing, cutting, trim, etc)
- ☐ Sourcing and production planning
- ☐ Expediting and logistics
- ☐ Warehousing and distribution
- ☐ Wholesale
- ☐ Buying and inventory
- ☐ Retail - ecommerce
- ☐ Retail - store
- ☐ Retail - other
- ☐ Marketing
- ☐ Customer service
- ☐ Fashion support (photography, make up, stylist)
- ☐ Fashion event planning
- ☐ Other

Workforce Opportunities and Challenges

1. What are your top three staffing challenges? Choose from the following:

   - Unable to hire employees because of the poor economy
   - Labor costs
   - Retaining the best employees
   - Lack of technical or technology expertise
   - Finding employees with the right skills
   - Creativity

2. What skills or attributes are in highest demand within the fashion industry?

3. Are you expanding, maintaining, downsizing, or outsourcing the following positions?

	Expand	Maintain	Downsize	Outsource	Not Relevant
Management	☐	☐	☐	☐	☐
Design	☐	☐	☐	☐	☐
Manufacturing	☐	☐	☐	☐	☐
Sourcing and supply chain	☐	☐	☐	☐	☐
Logistics and distribution	☐	☐	☐	☐	☐
Buying and merchandising	☐	☐	☐	☐	☐
Marketing and sales	☐	☐	☐	☐	☐
Retail	☐	☐	☐	☐	☐

Education

1. What level of educational attainment is required for these fashion occupations?

	High School	Associates	Fashion School/Certificate Program	Bachelor Degree	Masters Degree or higher
Management	☐	☐	☐	☐	☐
Design	☐	☐	☐	☐	☐
Manufacturing	☐	☐	☐	☐	☐
Sourcing and supply chain	☐	☐	☐	☐	☐
Logistics and distribution	☐	☐	☐	☐	☐
Buying and merchandising	☐	☐	☐	☐	☐
Marketing and sales	☐	☐	☐	☐	☐
Retail	☐	☐	☐	☐	☐

2. Does your firm (or you as an individual) take advantage of the following training programs?

	We've done this in the past	We plan to in the future
Individual on the job training	☐	☐
Workshops or small group sessions (in-house)	☐	☐
Workshops or small group sessions (outside provider)	☐	☐
Online programs	☐	☐
College programs	☐	☐
Trade organization events and seminars	☐	☐
We do not provide training	☐	☐
Other (please specify)		

3. Does your firm (or you as an individual) take advantage of the following university resources in Washington State?

	Yes	No	We plan to in the future	WA Schools can improve this
Employ or recruit WA fashion students	☐	☐	☐	☐
Recruit out-of-state fashion students	☐	☐	☐	☐
Offer student internships	☐	☐	☐	☐
Participate in job placement programs	☐	☐	☐	☐
Participate in training programs and conferences	☐	☐	☐	☐
Apply or inform university research	☐	☐	☐	☐
Advise university curriculum	☐	☐	☐	☐
Other (please specify)				

Industry Outlook

1. What are the top two opportunities and challenges for Washington State's Fashion Industry (or your business specifically)

2. What will be the biggest change in the fashion industry in the next ten years? How should individuals prepare for it?

3. What can public organizations (such as government, universities, and trade organizations) do to help your business be more competitive?

Thank You

Thank you for your participation! Your input will help educators and economic specialists better understand what it takes to make Washington State's fashion industry prosper. Please feel free to contact us with any question