



**The Fashion Industry in the West of England
A Report for Bath Spa University and the
West of England Combined Authority
December 2024**



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FutureFashionWorks.

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Executive Summary

The West of England Combined Authority and Future Fashion Works commissioned Buckman Associates Ltd to complete a study to analyse the distribution, nature and growth potential of fashion businesses in the West of England (covering the local authority areas of Bath & North East Somerset, Bristol, and South Gloucestershire and North Somerset).

The fashion industry – national and international perspectives

The fashion industry is broadly understood as the process that supports the creation, distribution, retail and supporting services of textiles, clothing, footwear and accessories, from manufacturing to consumer purchase and maintenance. It is worth approximately **2trn US dollars globally** and is expected to continue growing at rate of between 2 and 4% per year. In the UK in 2021 the industry supported 1.3m jobs (including indirect and induced jobs) and had a **GVA of £62bn**.

The literature review highlighted a range of issues and opportunities which are affecting the fashion industry at a national and international level. These include:

- **The rise of fast and ultrafast fashion** – where retailers compress production cycles to churn out new designs more quickly. As a result, clothing production doubled between 2000 and 2014, with consequences for the environment as well as social sustainability.
- **Environmental sustainability** – which is often cited as the number one issue facing the sector as it is responsible for significant emissions, pollution and waste. Equally, the structure of fashion’s supply chains globally means the industry is especially vulnerable to extreme weather events and climate volatility. However, regulatory standards and consumer pressure are increasingly demanding change, which could present opportunities to develop new business models, localise supply chains and improve operations through the use of technology.
- **Economic instability and supply chains** – global economic uncertainty is a key concern for the industry linked to supply chain vulnerabilities (highlighted during the pandemic). As a result, brands are increasingly bringing clothing production closer to home markets to reduce lead times, improve quality control and enhance their responsiveness to market changes. Equally, digital technologies such as AI and blockchain are also expected to play a significant role in helping brands to manage their supply chains.
- **Labour market** – Fast fashion brands have been strongly criticised for their use of exploitative labour practices. However, despite this being a rising concern for many consumers, research suggests that brands are not prioritising this issue. This challenge may offer opportunities for businesses prepared to explore alternative business models and technological solutions also have potential to improve traceability. At the same time, the sector is also facing numerous skills gaps in a range of areas (including digital roles).
- **Technology** – the application of technology is becoming increasingly important to the industry and offers the potential to:
 - Enhance the design process through AI and other software.
 - Develop new products that integrate technology such as smart textiles.
 - Improve the production process through the use of data and AI to reduce defects and reduce waste.

- Improve the customer experience (e.g. through virtual try ons and e-commerce solutions linked to social media).
- Improve supply chain management with AI based inventories and blockchain solutions.

Brought together, these global challenges may present an opportunity for the West of England to use its creative and innovative people and organisations to pioneer new ways of doing things.

The Economic Impact of the Fashion Industry in the West of England

Secondary data sources were used to explore the economic impact of the fashion industry in the West of England. The process utilised a definition based on set of SIC codes (Standard Industrial Classification Codes) which brought together definitions used by the ONS and Oxford Economics. Some of these SIC codes, overlap with other, broader sectors and where this is the case a weighting approach was adopted to estimate the size of the fashion sector.

The research found that there were approximately **1,145 fashion business** in the West of England in 2023, of which **91% were micro businesses** (0-9 employees), 9% were small and less than 1% were medium sized. The number of businesses has not changed significantly over the last 8 years. The **largest sub-sector was 'retail'** accounting for 41% of businesses, followed by product development and design (36%). Only 10% were involved in production and manufacturing. **45% of fashion businesses were located in Bristol**, 25% in Bath and North East Somerset (B&NES), 15% in North Somerset and 14% in South Gloucestershire. When compared with the business base, there were more fashion businesses than expected in Bristol and B&NES and less than expected in N. Somerset and S. Gloucestershire. However, the number of businesses is likely to be an under-estimate due to the number of very small businesses/self employed people working in the sector.

In 2022, the fashion sector employed approximately **10,890** (including working owners) and approximately **75% of all employment was in the retail** sub-sector. Since 2015, overall **employment has reduced by approximately 4,500 people** and this reduction has been driven by the retail sub-sector and may reflect the impact of the pandemic. Conversely, the product development and design sub-sector has grown, albeit from a relatively small base. 40% of fashion employment was in Bristol, 28% in South Gloucestershire, 20% in B&NES and 11% in N. Somerset. Overall, the fashion sector in the West of England has a location quotient of 0.72, which means it had **a lower than average concentration of employment**. However, at a sub-sector level, the 'product development and design' sub-sector had an LQ above 1, demonstrating that there is a modest specialisation effect in this area.

The total turnover for the fashion sector in the West of England was **at least £560m**. 45% of this turnover came from businesses based in Bristol, 24% from businesses in Bath and North East Somerset, 19% from South Gloucestershire and 12% from North Somerset. The largest sub-sector was 'retail', with almost £255.6m of turnover, followed by 'product development and design' with £103.5m.

The GVA for the sector was estimated to be approximately **£215.4m, equivalent to 0.5% of the region's total GVA**. When indirect (supply chain) and induced (spending of wages) effects were taken into account the economic value of the sector in the West of England was estimated to be **14,700 jobs and £334m GVA**. However, this may be an under-estimate given the limitations of some of the data sources.

Employment and skills

National data shows that almost **62% of people working in the fashion sector were women**, but this is driven by the retail sub-sector, where 67% of jobs were taken by women. Similarly, the fashion sector has **a younger age profile** than the rest of the economy, providing a vital stepping stone into the world of work for many. These findings highlight the role that fashion can play in supporting **inclusive growth**.

There were 104 occupations that employ more than 10 people in the fashion sector in the West of England. These **occupations fall across all occupational groups** and whilst the majority of jobs were in lower skilled occupations such as sales and customer service, **32% of jobs were in the top three occupational groups which require higher level skills**. The diversity of roles in the sector again means that it can play an important role in supporting the inclusive growth agenda.

Data from the Higher Education Statistics Agency shows that in 2021/22, higher education providers in the **West of England had 6,200 students enrolled in design, creative and performing arts courses**. The strong presence of students studying creative subjects helps to create a cultural environment that supports the development of the creative cluster in the West of England. Within this, Bath Spa University offers courses in both fashion design and textile design at an undergraduate and postgraduate level.

The HESA data also shows that in 2022/23 the region had 5,680 students enrolled in **computing** courses and 9,080 students enrolled in **engineering and technology** courses. Given the importance of digital technologies in the world of fashion this wider talent pool could be important to sector development.

West of England brands and fashion culture

The fashion culture in the West of England benefits from a **small number of high profile brands**. As well as providing a wide range of employment opportunities, larger brands can provide junior positions which can help young people gain experience in the world of fashion and retain graduates in the region. They could also provide a vital **anchor role** in helping to establish the region as a fashion cluster and attract other international brands.

The area is also a host to a plethora of **small independent designers, makers and brands**. Many of these draw inspiration from the **art and culture of the countryside** as well as the area's **urban heritage**. Many of these producers sell online as well as in market venues such as the award winning **Frome Market** (just outside the West of England area). They also benefit from studio spaces, such as the [Bristol Textile Quarter](#), which offers textile students, graduates, designer-makers and start-ups alike access to affordable co-work space and equipment. However, additional workspace, studio space and showcasing space is a requirement by the sector. Alongside Frome Market, the **city of Bath**, with its cultural assets, international visitors and 5-star hotels is able to support **luxury brands and shopping**.

Sustainability appears to be an important feature for many designers and brands operating from the West of England with a significant number of them operating schemes to repair or resell unwanted clothing or to minimise the impact of their production processes. Indeed, several West of England brands have adopted '**slow**' fashion or '**circular**' approaches as a counterpoint to fast fashion. The sustainable fashion sector is supported by several retail outlets that specialise in providing space for eco-conscious businesses.

Whilst many designers and brands are grounded in artisanal and craft techniques, many are also experimenting with **digital technologies**, such as interactive tech products. Linked to this, the area is home to several researchers who are working at the cross-roads between **fashion and health innovation**. The area's innovation strengths in robotics, advanced materials and health sciences could, when linked to expertise in the fashion sector, provide new opportunities for the region.

As well as designers and brands, the area also has a number of businesses offering **sewing and dressmaking courses** which provide a vital role in helping to upskill people who want to work in the sector as well as supporting a thriving sewing community. These also sit alongside various community projects which aim to use sewing to reduce loneliness and isolation amongst disadvantaged communities.

As well as contemporary fashion, the West of England also supports several businesses operating in the 'workwear' market.

Conclusions and Recommendations

The research has shown that the fashion sector **makes an important contribution to the West of England economy** and can also make a significant contribution to the region's **inclusive growth agenda**. The research found that the sector employs a higher proportion of **women and younger people** than the rest of the economy. Women play a vital role in this sector in the West of England and therefore, fashion could provide a useful counter-point to many of the somewhat male dominated sectors that have been prioritised in the West of England in recent years. The sector also offers opportunities across a **wide spectrum of occupations and skills levels**, making it accessible to a wide range of people.

The sector has **strong overlaps with wider creative, digital and technology sectors** through both supply chains, collaborative projects and businesses which span more than one sector. It therefore has the potential to **add value to these sectors** through economic spill-over effects.

The area has **many of the ingredients necessary to grow its fashion sector**. It is **close enough to London** to benefit from the capital's leading role in the fashion industry, whilst being far enough away to offer more affordable housing. It has a **strong creative talent base** and culture which is attractive to creative people. At the same time, the region benefits from a broader **digital and technological skills base**, which is now an important part of the fashion industry, with many jobs in the fashion sector, being 'digital jobs'. The intersection between the world of fashion and digital may be an interesting angle for partners in the West of England to explore further in the next stage of this research. In particular, how digital technologies may help to overcome some of the challenges facing the industry or conversely how digital fashion can help address other societal challenges (e.g. health).

It may also be useful to explore with industry stakeholders whether the region would benefit from **attracting a large fashion brand** in order to provide progression opportunities (e.g. junior positions) for young people wanting to work in the world of fashion.

The research also found evidence of a strong groundswell of businesses and independent brands that have a strong focus on delivering **sustainable fashion solutions**. It may be useful in the next stage of research to try and better understand the needs of this group and how they could be supported further.

Introduction

The West of England Combined Authority and Future Fashion Works commissioned Buckman Associates Ltd to complete a study to analyse the distribution, nature and growth potential of fashion businesses in the West of England.

The objective of the study is to gain a deeper understanding of existing fashion related businesses in the area. The study has been commissioned in two parts:

- Part 1 is a primarily desk-based exercise focusing on understanding key quantitative metrics relating to the size and nature of the sector such as the number of businesses, employment, turnover and GVA both in terms of the whole industry and its component sub-sectors. In addition, it includes a wider qualitative exploration of the fashion culture in the West of England, including case studies.
- Part 2 will seek to understand what the growth opportunities might be for the sector if it is optimally supported within the context of the move away from the recent model of fast and cheap to a slower and more sustainable system. Part 2 is expected to be commissioned in January 2025 and is expected to involve a deeper dive into the business networks of the region, using interviews with known business leaders to explore the nature of the fashion sector in the area.

Across the two parts, the study is expected to answer the following questions:

- What do fashion businesses in the West of England do, in terms of making, selling, reselling, and to whom?
- How large are these businesses and how many people do they employ, roughly what is their turnover?
- What is the geographical spread of such businesses across the West of England and what influences their decision around location

The results are expected to inform the development of a project, led by Bath Spa University to support the fashion sector.

The geographical scope of the study is the West of England Combined Authority area (covering the local authority areas of Bath & North East Somerset, Bristol, and South Gloucestershire) and North Somerset. This area is referred to as the West of England in the remainder of the report. The report is set out as follows:

- **Section two: sector overview** – an overview of the fashion sector highlighting its national and global economic impact and key trends and opportunities.
- **Section three: economic impact** – an analysis of the size and economic impact of the sector in the West of England including geographical distribution and trends.
- **Section four: employment and skills** – an analysis of the demographic profile of employment in the sector, as well as types of occupation and existing skills provision.
- **Section five: brands and fashion culture** – qualitative exploration of fashion culture in the West of England including, leading brands, supporting institutions and other assets that benefit the sector.
- **Section six** - conclusions and recommendations for the Bath Spa University and the next stage of research.

Section Two: The fashion industry – national and international perspectives

Summary: The fashion industry – national and international perspectives

The fashion industry is broadly understood as the process that supports the creation, distribution, retail and supporting services of textiles, clothing, footwear and accessories, from manufacturing to consumer purchase and maintenance. It is worth approximately **2trn US dollars globally** and is expected to continue growing at rate of between 2 and 4% per year. In the UK in 2021 the industry supported 1.3m jobs (including indirect and induced jobs) and had a **GVA of £62bn**.

The literature review highlighted a range of issues and opportunities which are affecting the fashion industry at a national and international level. These include:

- **The rise of fast and ultrafast fashion** – where retailers compress production cycles to churn out new designs more quickly. As a result, clothing production doubled between 2000 and 2014, with consequences for the environment as well as social sustainability.
- **Environmental sustainability** – which is often cited as the number one issue facing the sector as it is responsible for significant emissions, pollution and waste. Equally, the structure of fashion’s supply chains globally means the industry is especially vulnerable to extreme weather events and climate volatility. However, regulatory standards and consumer pressure are increasingly demanding change, which could present opportunities to develop new business models, localise supply chains and improve operations through the use of technology.
- **Economic instability and supply chains** – global economic uncertainty is a key concern for the industry linked to supply chain vulnerabilities (highlighted during the pandemic). As a result, brands are increasingly bringing clothing production closer to home markets to reduce lead times, improve quality control and enhance their responsiveness to market changes. Equally, digital technologies such as AI and blockchain are also expected to play a significant role in helping brands to manage their supply chains.
- **Labour market** – Fast fashion brands have been strongly criticised for their use of exploitative labour practices. However, despite this being a rising concern for many consumers, research suggests that brands are not prioritising this issue. This challenge may offer opportunities for businesses prepared to explore alternative business models and technological solutions also have potential to improve traceability. At the same time, the sector is also facing numerous skills gaps in a range of areas (including digital roles).
- **Technology** – the application of technology is becoming increasingly important to the industry and offers the potential to:
 - Enhance the design process through AI and other software.
 - Develop new products that integrate technology such as smart textiles.
 - Improve the production process through the use of data and AI to reduce defects and reduce waste.
 - Improve the customer experience (e.g. through virtual try ons and e-commerce solutions linked to social media).
 - Improve supply chain management with AI based inventories and blockchain solutions.

Brought together, these global challenges may present an opportunity for the West of England to use its creative and innovative people and organisations to pioneer new ways of doing things.

This section provides an overview in terms of the size and scale of the fashion industry nationally and globally, its growth trends and forecasts and key issues affecting the sector.

2.1 What is the fashion industry?

The fashion industry is broadly understood as the process that supports the creation, distribution, retail and supporting services of textiles, clothing, footwear and accessories, from manufacturing to consumer purchase and maintenance. Whilst exact definitions vary in the literature, the key components can be thought of in terms of the product life cycle, as illustrated below.

Figure 1: Key components of the fashion industry



Alongside this 'core' industry, the sector supports an **indirect impact via the supply chain**, as fashion industry businesses purchase products and services from UK suppliers. For example, the **transportation** of fashion and textile products for wholesale/retail purposes, **business services sector** (e.g. legal, accountancy, IT etc.), as well as key parts of the **creative sector such as photography, advertising agencies** etc. With the rise of on-line shopping since the pandemic, there is also a significant overlap with the **digital sector**. The industry also forms part of the **supply chain for other sectors** such as aerospace (e.g. fabrics and textiles used in the production of aircraft), health and hospitality to name but a few.

2.2 How big is the fashion industry and how fast is it growing?

2.2.1 Globally

Research by Euromonitor International¹ shows that global sales of apparel and footwear peaked at just under **2trn US dollars in 2019** before contracting significantly during the pandemic. In 2021, the sector showed a strong recovery with a 12% growth rate, followed by a slight reduction in growth in 2022. Since then, growth has been more consistent at about 2% per year and the sector is expected to **recover pre-pandemic levels by late 2025/26** before exceeding 2trn US dollars in 2027. Research by McKinsey echoes these projections and suggests that the fashion industry is expected to achieve year-on-year sales growth of between 2 percent and 4 percent in 2024.²

To put the size of the fashion industry in context, McKinsey, in its State of Fashion 2017 report highlighted that:

"Fashion is one of the world's most important industries, driving a significant part of the global economy. It is one of the key value-creating industries for the world economy. If it were ranked alongside individual countries' GDP the global fashion industry would represent the seventh-largest economy in the world,"

However, McKinsey also highlights that fashion leaders are **uncertain about prospects** for the year ahead with consumer confidence thought to be fragile. Key causes for concern amongst executives surveyed by McKinsey include geopolitical events, weakened economies and the continuing impact of high interest rates.

2.2.2 Nationally

A report commissioned by the UK Fashion and Textile industry in 2023³, found that in 2021, the whole UK industry (including indirect and induced effects):

- Supported £62bn in Gross Value Added, of which £46bn arose in the distribution, retail and aftercare sub-sector and £15bn in the creating and making sub-sector.
- Supported 1.3m jobs (one in 25 jobs in the UK), of which 1m were supported in the distribution, retail and aftercare sub-sector and 260,000 in the creating and making sub-sector.

¹ <https://www.euromonitor.com/article/top-trends-in-global-apparel-and-footwear-in-2024-and-beyond>

² The State of Fashion, 2024, McKinsey

³ The fashion and textile industry's footprint in the UK, October 2023. Oxford Economics

2.3 Key issues/opportunities affecting the sector

The literature highlights a range of issues and opportunities which are affecting the fashion industry at a national and international level. They can be grouped under the following headings:

- The rise of fast (and ultrafast) fashion.
- Environmental sustainability.
- Economic instability/disposable incomes.
- Labour market.
- Technology.

2.3.1 The rise of fast (and ultrafast) fashion

The rise of fast fashion, where retailers move faster than their traditional counterparts has driven an increase in clothing production all over the world. **From 2000 to 2014, clothing production doubled**, and the number of garments purchased per capita increased by about 60 percent. This is due, in part, to the rise of fast fashion⁴.

In fast fashion retailers **compress production cycles** and turn out up to the minute designs, enabling shoppers to not only expand their wardrobes but also refresh them quickly—and cheaply. According to McKinsey, this process started in the 1990s with a move by Zara to break the mould by offering hundreds of new items per week.

This process has grown faster to become ‘**ultrafast fashion**’. For instance, as of 2023, the Chinese ultrafast fashion retailer Shein consistently churns out up to 10,000 new designs a day, which are on average significantly cheaper than their more established rivals. Fast fashion retailers such as Shein and Temu are updating the model in the following ways⁵:

- **Agile, scalable manufacturer-to-consumer supply chains** - Some next-generation fast fashion companies have developed large networks of suppliers who often manufacture exclusively for these companies.
- **Data-driven product design and testing** - Shein, for instance, uses demand-driven trend modelling to design and select its products. This includes a range of data inputs from current trends to viral products to customer perception.
- **Loyal and growing customer bases** - These are fed by affiliate marketing influencer programs and organic social community building, which lower customer acquisition costs.
- **High app adoption rates and engagement tactics** - Companies have gamified their app experiences, allowing customers to earn loyalty points by setting up accounts, leaving reviews, watching live streams, and more.

As is discussed in the next sections, the rise in fast fashion has created significant challenges in terms of environmental and social sustainability.

⁴ <https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-fast-fashion>

⁵ <https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-fast-fashion>

2.3.2 Environmental sustainability

Environmental sustainability is often cited as the number one issue facing the fashion sector as it is responsible for significant emissions, pollution and waste. For instance:

- The fashion industry was responsible for **at least 4% of global greenhouse gas emissions** in 2018, more than the entire economies of France, Germany and the United Kingdom combined. Without substantial carbon-abatement measures, the current trajectory will lead to an industrywide emissions level that is still twice the size of that required to meet the Paris Agreement's target for 2030⁶.
- **Less than 1% of fashion textiles are recycled** and a truckload of products are sent to landfill or incinerated somewhere in the world every second.⁷
- In the UK, **second hand clothes are often exported to developing countries** (like Ghana), where a significant proportion is not able to be re-used or recycled and ends up in informal landfills, rivers and the sea⁸.

The environmental impacts are driven by and exacerbated by a pattern of increasing/over consumption, which if continued unchecked will see clothing and footwear consumption expected to increase by over 60% from 62 million tonnes in 2019 to 102m tonnes in 2030⁹. A key part of the waste problem is **overproduction**, with an estimated 4-9% of all textile products put on the market in Europe destroyed before use¹⁰, often associated with returned goods.

At the same time, the geographic footprint and the structure of fashion's supply chains means that **the industry is especially vulnerable to extreme weather events and climate volatility**, as the industry is reliant on countries and regions most directly impacted by climate upheavals. Analysis by McKinsey highlighted that by 2030, extreme weather events could jeopardise \$65bn worth of apparel exports and eliminate one million jobs in four economies that are amongst the most central to the global fashion industry – Bangladesh, Cambodia, Pakistan and Vietnam¹¹.

However, **regulatory changes** in the EU, UK and the US are expected to come into force over the next few years which are expected to require companies to fix their own operations and force higher standards in their supply chains. The EU is leading the charge in this space through the implementation of its Strategy for Sustainable and Circular Textiles, which envisages an industry defined by products made with respect for the environment and social rights. As many as 16 pieces of legislation are currently under discussion covering product design, marketing, waste management, reporting, traceability, sourcing and production and end of life wastes.

At the same time, consumers are increasingly demanding genuine sustainable practices from clothing brands, not just greenwashing marketing tactics. This has also provided an opportunity for new businesses such as **Vinted** and **Depop** to operate in the **second-hand market** for clothes.

⁶ <https://www.mckinsey.com/industries/retail/our-insights/fashion-on-climate>

⁷ Ellen MacArthur Foundation, *A new textiles economy: Redesigning fashion's future* (2017).

⁸ <https://www.theguardian.com/global-development/2023/jun/05/yvette-yaa-konadu-tetteh-how-ghana-became-fast-fashion-dumping-ground>

⁹ The State of Fashion, 2024, McKinsey

¹⁰ <https://www.eea.europa.eu/publications/the-destruction-of-returned-and#:~:text=In%20Europe%2C%20the%20average%20return,for%20returned%20and%20unsold%20textiles>.

¹¹ The State of Fashion, 2024, McKinsey

Whilst these sustainability issues could be perceived as a threat to the industry, they also present opportunities in terms of:

- Developing new, circular business models (including facilities for recycling).
- Localising supply chains.
- Using digital, technology and new materials to improve efficiency, traceability and waste management.

2.3.3 Economic instability and supply chains

According to McKinsey¹², fashion industry executives see **global economic uncertainty** as a key cause for concern. In particular, geopolitical events (including wars in Ukraine and the middle east), economies weakened from the pandemic, and the continuing impact of inflation and high interest rates on consumer confidence. Further, fluctuations in demand that have punctuated the past few years are expected to have a **negative impact on supply chains**, resulting in a ‘bullwhip effect’. This is where small sales variations cause high levels of volatility, leading to factory underutilisation, layoffs and delayed infrastructure investments.

According to a report by Deloitte, 56% of fashion industry executives cited **supply chain disruptions as their top challenge**, with the COVID 19 pandemic highlighting the vulnerabilities in global supply chains, leading to delays, increased costs and production halts. As a result, **nearshoring and re-shoring** have emerged as viable options to reduce dependence on distant manufacturing hubs. By bringing clothing production closer to home markets, brands can reduce lead times, improve quality control and enhance their responsiveness to market changes. The use of **digital technologies** such as AI and blockchain are also expected to play a significant role in helping brands to manage their supply chains.¹³

2.3.4 Labour market

The 2019 Fixing Fashion report by the Environmental Audit Committee highlighted how the biggest retailers have ‘chased the cheap needle around the planet’ by commissioning production in countries with **low pay, little trade union representation** and weak environmental protection. In many countries, poverty-pay and conditions are standard for garment workers, most of whom are women. The report also highlighted the use of **child labour, prison labour, forced labour and bonded labour** in factories and the garment supply chain. It also drew attention to the fact that that labour exploitation is also taking place in the UK, where some garment factories do not pay the minimum wage.¹⁴

Research by Vogue¹⁵ in 2021 found that **consumer expectations** for the fashion industry to treat workers fairly and be transparent on wages and labour rights are as high as expectations for environmental issues. Despite this, many brands continue to prioritise setting environmental goals over labour rights commitments. This is leading to calls for the industry to approach its sustainability efforts in a way that includes ethics and the rights of workers in the supply chain. The challenge also offers opportunities for businesses prepared to explore

¹² The State of Fashion, 2024, McKinsey

¹³ <https://heuritech.com/articles/fashion-industry-challenges/>

¹⁴ <https://publications.parliament.uk/pa/cm201719/cmselect/cmenvaud/1952/report-summary.html#heading-1>

¹⁵ [Consumers want labour rights transparency. Fashion is lagging. | Vogue Business](#)

alternative business models and supply chains approaches. Similarly, technology solutions such as blockchain have the potential to support traceability.

At the same time, according to a report into the state of skills in the apparel industry¹⁶ the sector is also facing **skills gaps** in areas such as:

- Product development.
- Sustainability and environmental management.
- Product design and development software operations.
- Data analytics.
- Patternmaking.
- R&D.
- Production management.
- Customer relationship management.
- Fashion design.
- IT (e.g. software engineering, system analysis).
- Management/leadership/HR training.
- Soft skills.

These skills gaps highlight the increasingly important role of technology in the sector.

2.3.5 Technology

Like many other parts of the economy, the application of technology is becoming an increasingly important aspect of the industry. Key technology trends affecting the sector include¹⁷:

- **Artificial intelligence** – Software used to mimic human cognitive functions such as learning and problem solving. In the fashion sector it is being used to improve the shopping experience of their customers, analyse data, increase sales, forecast trends, and provide inventory-related guidance. Looking to the future, Generative AI is expected to play an increasingly important role in supporting the creative process.
- **Novel/smart fabrics** – Which include potential ethical alternatives to products derived from animals such as leather and silk, as well as smart textiles which are constructed with nano technology or conductive threads which enable wearers to interact with the environment as well as 3D printed products.
- **3D printing** - Since the advent of 3D printers, many brands, both big and small, have been looking into the possibilities it holds for on-demand production. This will also create new avenues for customization, sustainability, and creativity. 3D printing offers opportunities to reduce labour inputs and waste in the production process.
- **Internet of Things** – Products such as smart watches that are embedded with technology to allow the exchange and connection of data over the internet. A key area of expected growth in this market are products related to health, which go beyond the smart watch to technologies that can keep people warm and manage health conditions.
- **Data analysis** - New software tools available on the market allow brands and factories to receive real-time feedback and alerts from companies about defects or damaged goods. This helps them save money, eliminate waste, and deliver adequate products at

¹⁶ Motif, 2020, the State of Skills in the Apparel Industry

¹⁷ <https://techpacker.com/blog/design/top-10-fashion-technology-trends/>

the right time. It also lets them maximize customer satisfaction by recognizing potential business threats instantly.

- **Mobile and e-commerce** – Shopping via e-commerce platforms on computers or mobile devices. Driven at first by the pandemic, online shopping is now a primary route to market for many brands (with some disruptors such as Shein operating on an online only basis). This growth is linked to the rise of social media (as a means of marketing products and new lines) as well as the ease of purchasing through these routes. Likewise, sustainable fashion apps like Vinted and Depop have taken the market by storm, replacing traditional avenues like eBay and Gumtree for selling second-hand fashion.
- **Virtual and augmented reality** – Virtual reality combines the real world with the online world. In the fashion sector, ‘virtual try-ons’ are becoming widespread and are expected to provide a better customer experience as well as reducing the extent to which customers return products. VR/AR also have potential applications in the design process where designers can quickly turn patterns into 3D images, allowing rapid adjustments.
- **Online vector editors** – Designers are now able to access a greater range of software programmes for use in the creative process. Some of these include clothing templates.
- **Blockchain** - Blockchain is mostly used as a record-keeping technology behind Bitcoin and digital currency. "Blocks" on the blockchain are made up of digital pieces of data that store information about transactions like the date, time, and dollar amount of your most recent purchase, as well as who is participating in the transactions. However, they also store information that distinguishes them from other blocks, using a unique code called a hash. This can be used to efficiently trace and keep records of clothing apparel and supply chains through technology like track-and-trace and inventory management. This is thought to be an important tool in improving the transparency of the fashion supply chain.
- **Ai-based inventory management** - Inventory management software aids in the monitoring and tracking of inventory levels, orders, sales, delivery, and receipts. Purchase orders, bills of materials, and other production-related documents can also be generated using inventory management software.

Brought together, these global challenges may present an opportunity for the West of England to use its creative and innovative people and organisations to pioneer new ways of doing things. This might include new sustainable business models, local supply chains that reduce the carbon footprint of the clothes we wear as well as advanced technologies that use technology as an enabler of sustainable growth.

Section Three: Economic impact of the fashion industry in the West of England

Summary: The Economic Impact of the Fashion Industry in the West of England

Method

Secondary data sources were used to explore the economic impact of the fashion industry in the West of England. The process utilised a definition based on set of SIC codes (Standard Industrial Classification Codes) which brought together definitions used by the ONS and Oxford Economics. Some of these SIC codes, overlap with other, broader sectors and where this is the case a weighting approach was adopted to estimate the size of the fashion sector.

Businesses

The research found that there were approximately **1,145 fashion business** in the West of England in 2023, of which **91% were micro businesses** (0-9 employees), 9% were small and less than 1% were medium sized. The number of businesses has not changed significantly over the last 8 years. The **largest sub-sector was 'retail'** accounting for 41% of businesses, followed by product development and design (36%). Only 10% were involved in production and manufacturing. **45% of fashion businesses were located in Bristol**, 25% in Bath and North East Somerset (B&NES), 15% in North Somerset and 14% in South Gloucestershire. When compared with the business base, there were more fashion businesses than expected in Bristol and B&NES and less than expected in N. Somerset and S. Gloucestershire. However, the number of businesses is likely to be an under-estimate due to the number of very small businesses/self employed people working in the sector.

Employment

In 2022, the fashion sector employed approximately **10,890** (including working owners) and approximately **75% of all employment was in the retail** sub-sector. Since 2015, overall **employment has reduced by approximately 4,500 people** and this reduction has been driven by the retail sub-sector and may reflect the impact of the pandemic. Conversely, the product development and design sub-sector has grown, albeit from a relatively small base. 40% of fashion employment was in Bristol, 28% in South Gloucestershire, 20% in B&NES and 11% in N. Somerset. Overall, the fashion sector in the West of England has a location quotient of 0.72, which means it had **a lower than average concentration of employment**. However, at a sub-sector level, the 'product development and design' sub-sector had an LQ above 1, demonstrating that there is a modest specialisation effect in this area.

Turnover

The total turnover for the fashion sector in the West of England was **at least £560m**. 45% of this turnover came from businesses based in Bristol, 24% from businesses in Bath and North East Somerset, 19% from South Gloucestershire and 12% from North Somerset. The largest sub-sector was 'retail', with almost £255.6m of turnover, followed by 'product development and design' with £103.5m.

GVA

The GVA for the sector was estimated to be approximately £215.4m, equivalent to 0.5% of the region's total GVA.

Indirect and induced effects

When indirect (supply chain) and induced (spending of wages) effects were taken into account the economic value of the sector in the West of England was estimated to be 14,700 jobs and £334m GVA. However, this may be an under-estimate given the limitations of some of the data sources.

This part of the report uses secondary data sources to explore the economic impact of the fashion industry in quantifiable terms (i.e. how many businesses/jobs are there and what contribution do they make to the economy).

3.1 Method and definitions

The starting point for any quantitative analysis is the definition used. The literature review found two sources which provided a transparent definition of the sector using Standard Industrial Classification codes (SIC codes). The first was a definition utilised by ONS when responding to a bespoke request for data relating to the UK fashion and textile industry¹⁸. This grouped SIC codes into sub-groups relating to manufacturing, wholesale, retail and services. The second is a definition utilised by Oxford Economics, which follows a similar approach, grouping SIC codes into ‘creating and making’ and ‘distribution, retail and care’. Appendix 1 shows these two definitions.

After consulting with the client, it was agreed to adopt a definition which combined these two existing definitions. Figure Two below shows the SIC codes utilised, broken down into the sub-sectors highlighted in Section 2.1. The methodology also recognises that some of these SIC codes cover a wider group of sectors, beyond ‘fashion’. For instance, SIC code 7410: ‘specialised design activities’ is not restricted to fashion design. Therefore, Figure Two also shows the proportion of businesses/jobs/turnover etc. allocated to the fashion sector for each SIC code. These figures are based on the allocations used by Oxford Economics. It should be noted that no suitable SIC codes were identified for the ‘disposal and recycling’ sub-sector.

Figure 2: SIC codes used

SIC code	% allocated to fashion
Product Development and Design	
7410 : Specialised design activities	50%
9003 : Artistic creation	50%
Production and Manufacturing	
0116 : Growing of fibre crops	100%
13 : Manufacture of textiles	100%
14 : Manufacture of wearing apparel	100%
15 : Manufacture of leather and related products	100%
2060 : Manufacture of man-made fibres	100%
2314 : Manufacture of glass fibres	100%
2894 : Manufacture of machinery for textile, apparel and leather production	100%
3103 : Manufacture of mattresses	100%
3212 : Manufacture of jewellery and related articles	100%
3213 : Manufacture of imitation jewellery and related articles	100%

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<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/adhocs/1435analysisofenterprisesintheukfashionandtextileindustry2022>

SIC Code	% allocated to fashion
Wholesale	
4616 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods	100%
4624 : Wholesale of hides, skins and leather	100%
4641 : Wholesale of textiles	100%
4642 : Wholesale of clothing and footwear	100%
4648 : Wholesale of watches and jewellery	100%
4664 : Wholesale of machinery for the textile industry and of sewing and knitting machines	100%
Retail	
4719 : Other retail sale in non-specialised stores	33%
4751 : Retail sale of textiles in specialised stores	100%
4753 : Retail sale of carpets, rugs, wall and floor coverings in specialised stores	100%
4764 : Retail sale of sporting equipment in specialised stores	33%
4771 : Retail sale of clothing in specialised stores	100%
4777 : Retail sale of watches and jewellery in specialised stores	100%
4772 : Retail sale of footwear and leather goods in specialised stores	100%
47782 : Retail sale by opticians	100%
47820 : Retail sale via stalls and markets of textiles, clothing and footwear	100%
Services	
77299 : Renting and leasing of other personal and household goods (other than media entertainment equipment)	9%
9523 : Repair of footwear and leather goods	100%
9524 : Repair of furniture and home furnishings	100%
9525 : Repair of watches, clocks and jewellery	100%
9601 : Washing and (dry-)cleaning of textile and fur products	100%

3.2 Direct economic impact

This section explores the direct economic impact of the fashion sector, i.e. the number of businesses, jobs, turnover etc. associated with businesses operating in the sectors above (adjusted to reflect the % allocated to fashion).

3.2.1 Number of businesses

This report utilises the Inter-Departmental Business Register (IDBR) to estimate the size of the sector in the West of England. The IDBR is a comprehensive list of UK businesses used by government for statistical purposes. The register draws on:

- Records from HMRC (in terms of Value Added Tax (VAT) and Pay As You Earn (PAYE) records).
- Companies House.
- Dun and Bradstreet.
- ONS business surveys.

The IDBR covers around 2.7 million businesses in all sectors of the economy, but since the main two tax sources have thresholds, very small businesses operating below these will, in

most cases, not be included. Similarly, people working on a self-employed basis will not be captured. The number of businesses was sourced from the ONS publication ‘UK Business: Activity, Size and Location via nomisweb’.

The IDBR collects data on ‘enterprises’ and ‘local units’. An enterprise can be thought of as the overall business, made up of individual sites or workplaces. Local units are the individual sites (e.g. factories or shops) associated with an enterprise. The data presented in this section relate to enterprises only.

Headline number of businesses

Estimates using the IDBR show that in 2023, there were approximately 1,145 fashion businesses in the West of England, but this is likely to be an underestimate for the reasons outlined above.

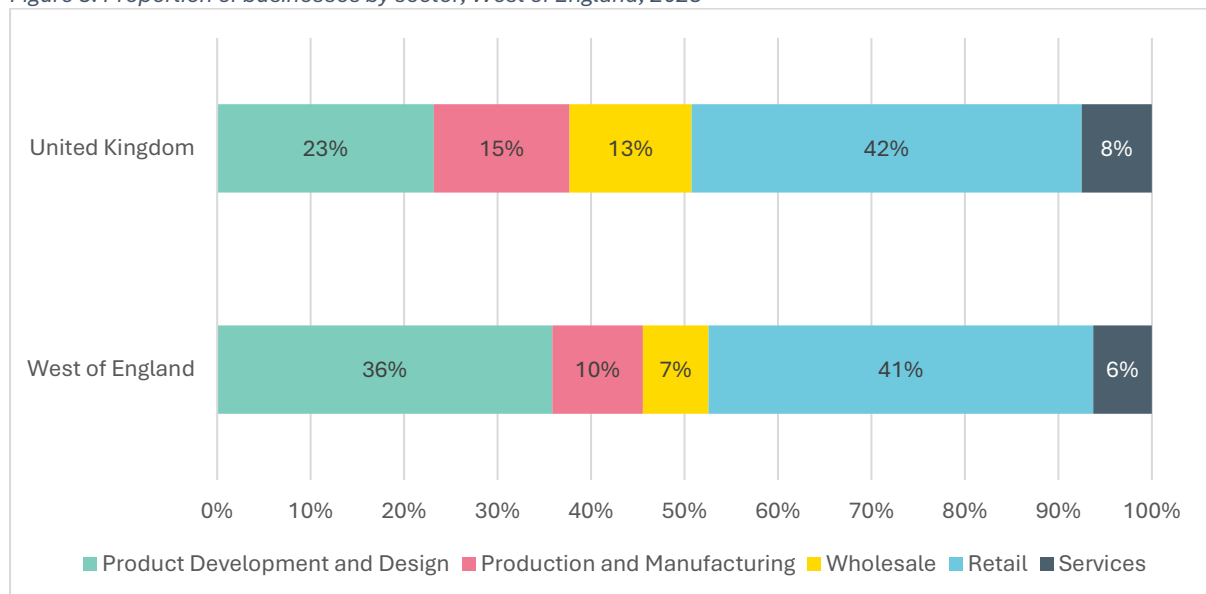
Size band

In terms of business size, 91% of businesses were micro businesses (0 to 9 employees), 9% were small (10 to 49) and a small number were medium sized (less than 1%).¹⁹

Distribution of businesses by sub-sector

Figure Three shows that that largest sub-sector was ‘retail’ accounting for 41% of the businesses in 2023, followed by ‘product development and design’ with 36%. When compared with the UK distribution, the West of England has a relative strength in ‘product development and design’.

Figure 3: Proportion of businesses by sector, West of England, 2023



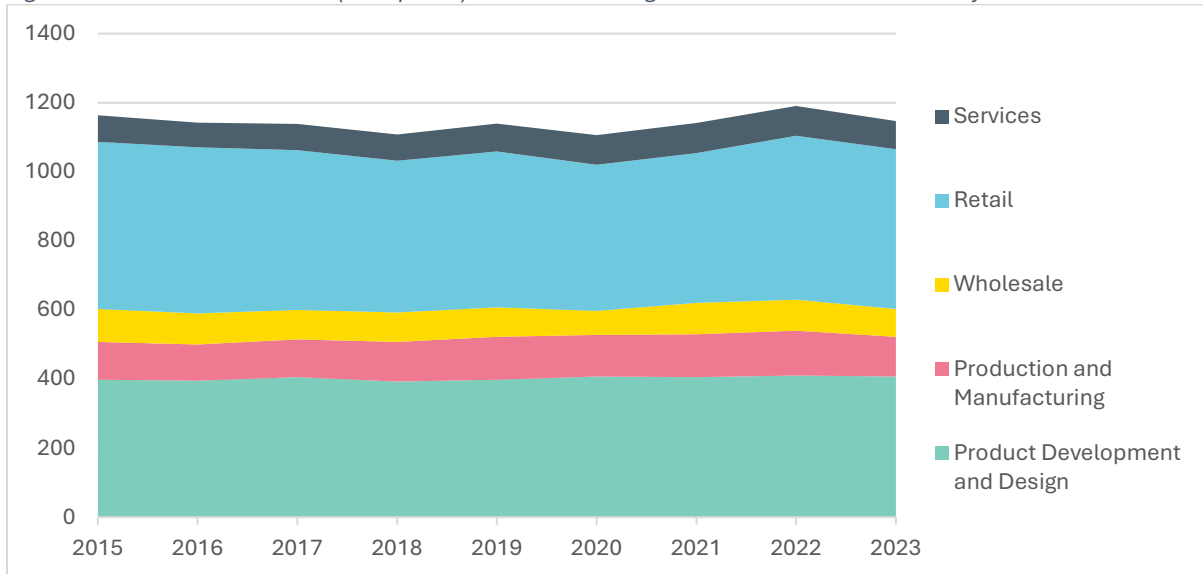
Source: UK Business: Activity, Size and Location via nomisweb

Number of businesses over time

Figure Four shows that overall, the number of fashion businesses in the West of England has not changed significantly over the last 8 years. Whilst there was a slight ‘dip’ in the trend in 2020, this is likely to reflect the impact of the pandemic.

¹⁹ Source: UK Business: Activity, Size and Location via nomisweb

Figure 4: Number of businesses (enterprises) in the West of England between 2015 and 2023 by sub-sector

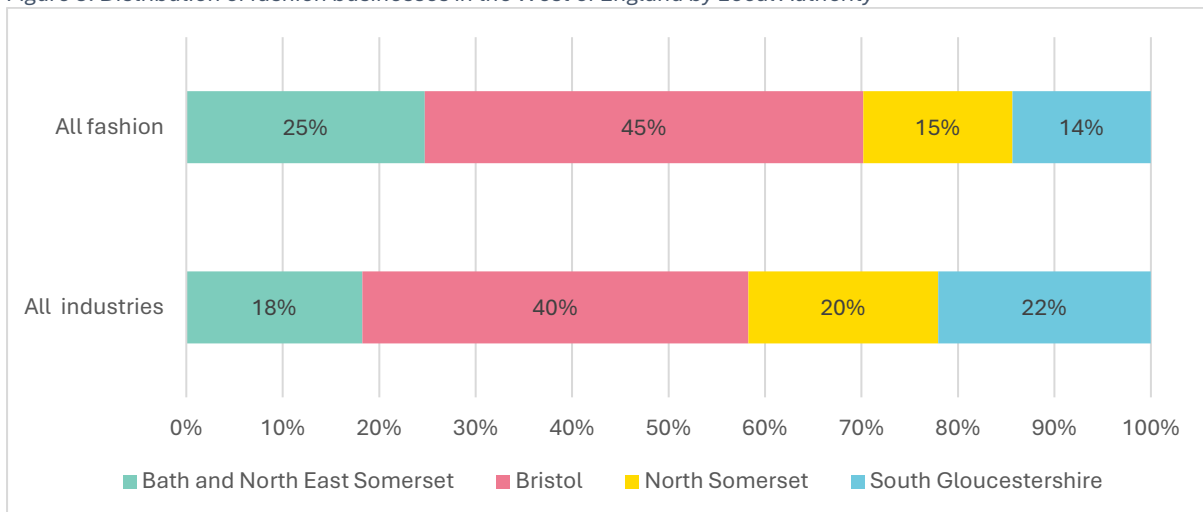


Source: UK Business: Activity, Size and Location via nomisweb

Geographical distribution of businesses

Figure Five shows that within the West of England, 45% of fashion businesses were located in Bristol, 25% in Bath and North East Somerset (B&NES), 15% in North Somerset and 14% in South Gloucestershire. When compared to the distribution of all industries across the area, the graph shows that there were more fashion businesses than expected given the size of the business base in Bristol and B&NES and less than expected in North Somerset and South Gloucestershire.

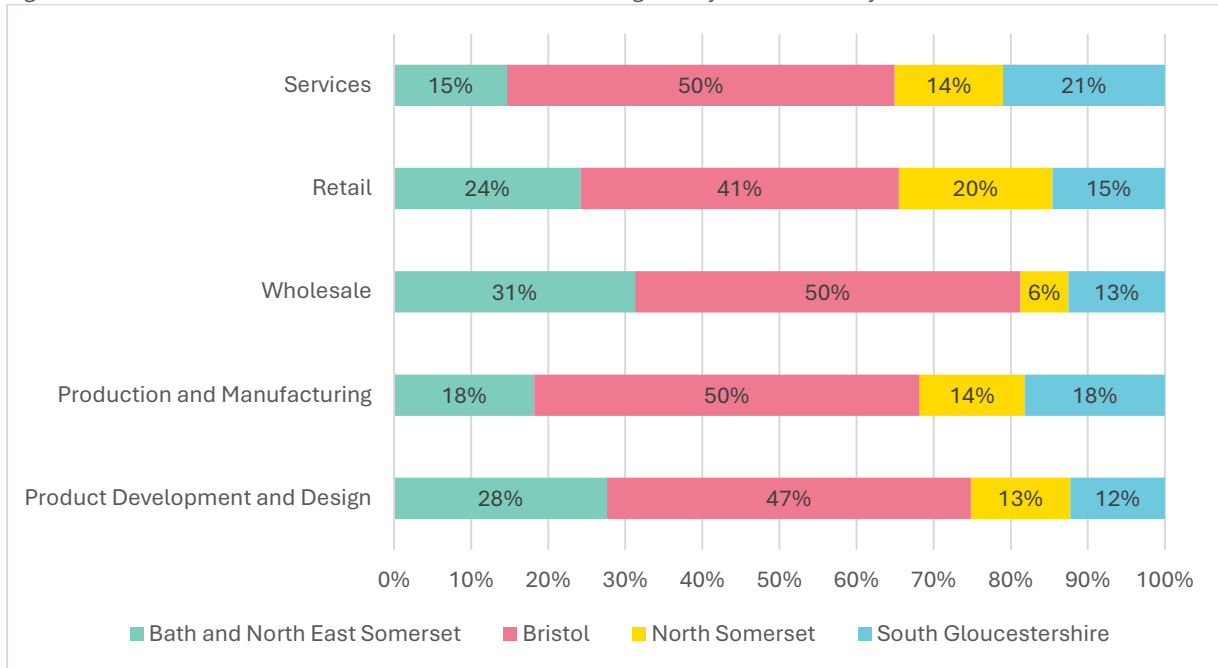
Figure 5: Distribution of fashion businesses in the West of England by Local Authority



Source: UK Business: Activity, Size and Location via nomisweb

Figure Six shows that the sub-sectors were distributed fairly evenly across the area, albeit with some variations. For instance, Bristol accounted for 50% of all ‘production and manufacturing’, ‘wholesale’ and ‘service’ businesses. Conversely, B&NES accounted for 31% of all ‘wholesale’ businesses and 28% of ‘product development and design’ businesses. Whilst North Somerset had just 15% of the fashion businesses in the West of England, it had 20% of the ‘retail’ businesses. Similarly, whilst South Gloucestershire had just 14% of all fashion businesses in the West of England it had 21% of the ‘service’ businesses.

Figure 6: Distribution of fashion sub-sectors in the West of England by Local Authority



Source: UK Business: Activity, Size and Location via nomisweb

3.2.2 Employment

The official source of employment statistics is the Business Register and Employment Survey. This uses two main definitions of employment status:

- **Employees** - An employee is anyone aged 16 years or over that an organisation directly pays from its payroll(s), in return for carrying out a full-time or part-time job or being on a training scheme. It excludes voluntary workers, self-employed, working owners who are not paid via PAYE.
- **Employment** - Includes employees plus the number of working owners. BRES therefore includes self-employed workers as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self-employed people not registered for these, along with HM Forces and Government Supported trainees are excluded. Working owners are typically sole traders, sole proprietors or partners who receive drawings or a share of the profits.

As per the methodology above, the data was adjusted to reflect the estimated proportion of businesses in the fashion sector for those SIC codes which extend beyond the sector.

Headline employment

Analysis of BRES data shows that in 2022, the fashion sector had:

- 10,800 employees
- A total employment of 10,890 people.

Distribution of employment by sub-sector

Figure Seven shows the distribution of employment and employees by sub-sector. This shows that approximately 75% of all employment is in the 'retail' sub-sector.

Figure 7: Employment and Employees in the West of England by sub-sector

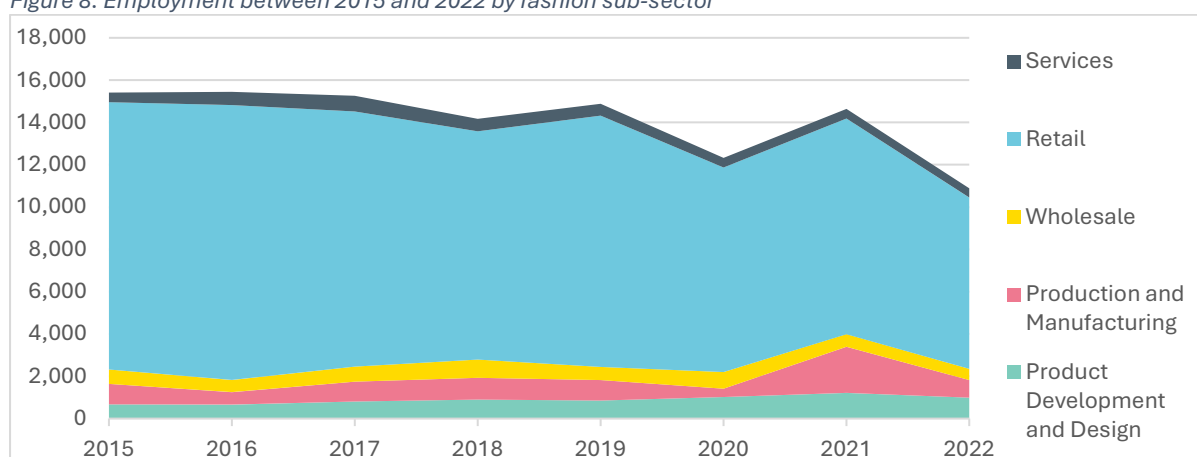
	Employment		Employees	
	Number	%	Number	%
Product Development and Design	990	9%	990	9%
Production and Manufacturing	830	8%	830	8%
Wholesale	535	5%	525	5%
Retail	8,100	74%	8,080	75%
Services	435	4%	380	4%
Total	10,890		10,800	

Source: Business Register and Employment Survey, 2022

Employment trends over time

Figure Eight below that overall employment in sector had decreased by approximately 4,500 people since 2015. This was driven by the ‘retail’ sub-sector and may reflect the impact of the pandemic. Conversely, the ‘product development and design’ sub-sector grew in size, albeit from a relatively small base. Whilst the ‘production and manufacturing’ sub-sector shows a significant uplift in employment between 2020 and 2021, this was not maintained into 2022. This may therefore be an anomaly, rather than a genuine change.²⁰

Figure 8: Employment between 2015 and 2022 by fashion sub-sector



Source: Business Register and Employment Survey, 2022

Geographical distribution of employment

Figure Nine shows an approximate distribution of employment and employees in the fashion sector by each local authority area. This shows that Bristol accounted for 40% of employment, followed by South Gloucestershire with 28%. This pattern differs from the geographical distribution of businesses shown in Figure Five. This may reflect the effect of ‘chain stores’. The business statistics presented above count the number of ‘enterprises’ in the area, which is likely to exclude ‘chain stores’ unless they are headquartered in the West of England. In

²⁰ The Business Register and Employment Survey (BRES) is an annual business survey, publishing employee and employment estimates at detailed geographical and industrial levels. The survey sample of approximately 87,000 businesses is weighted up to represent the Great Britain economy covering all sectors. It should be noted that BRES is a sample survey and produces estimated employment figures. These estimates are of a good quality at higher levels of geography (for example, region). The quality of the estimates deteriorates as the geographies get smaller and this should be considered when utilising the sub-national estimates.

contrast the BRES statistics present the number of people employed based on their location of employment. Therefore, the employment count will include people employed in chain stores.

Figure 9: Distribution of Employment and Employees in the Fashion Industry by Local Authority

	Employment		Employees	
	Number	%	Number	%
Bath and North East Somerset	2,225	20%	2,200	20%
Bristol	4,355	40%	4,310	40%
North Somerset	1,170	11%	1,140	11%
South Gloucestershire	3,090	28%	3,075	28%
Total	10,890		10,800	

Source: Business Register and Employment Survey, 2022

Relative Specialisation

When looking to understand a sector or part of the economy, it can also be useful to explore the extent to which a sector is unique to the area and specialised in the regional economy. One way to do this is through location quotients (LQ). The LQ explores the share of employment in an industry in an area with the national average. For instance, if fashion retailing accounts for 2.5% of all jobs in the West of England, but only 1% of jobs nationally, then the LQ is 2.5, which means that fashion retailing is 2.5 times more concentrated in the region than nationally. Conversely, if the LQ is less than 1 it demonstrates that the sector is less concentrated.

Figure Ten shows that overall, the fashion sector in the West of England has a Location Quotient of 0.72, which means that it has a lower-than-average proportion of employment. However, at a sub-sector level, the ‘product development and design’ sub-sector has an LQ above 1, demonstrating that there is a modest specialisation effect in this area.

Figure 10: Location Quotients for fashion sub-sectors in the West of England

	Location Quotient
Product Development and Design	1.10
Production and Manufacturing	0.40
Wholesale	0.36
Retail	0.77
Services	0.57
Total	0.72

Source: Business Register and Employment Survey, 2022

3.2.3 Turnover

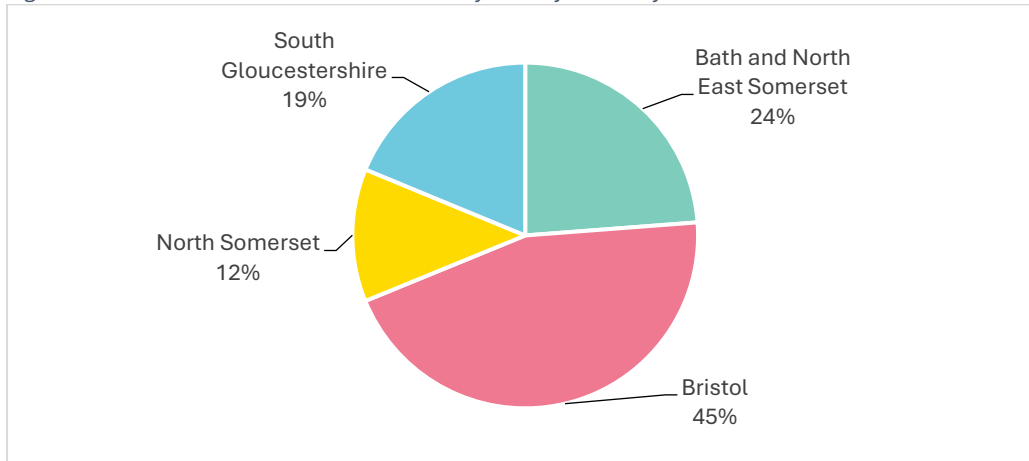
This report utilises the IDBR to estimate the turnover associated with the fashion sector in the West of England. As turnover data is not routinely published by ONS, the data was obtained via a bespoke request from the non-disclosive data analysis service.²¹ The data was then adjusted to account for SIC codes which extend beyond the fashion sector (see 3.1).

The IDBR analysis indicates that the total turnover in the fashion sector in the West of England is approximately £560m.

Figure Eleven shows that 45% of this turnover came from businesses based in Bristol, 24% from businesses in Bath and North East Somerset, 19% from South Gloucestershire and 12% from North Somerset.

²¹ [Unitary authorities in the South West LEP and the UK for 2023 - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

Figure 11: Estimated distribution of turnover by Unitary Authority area



Source: Analysis based on IDBR user requested data

Figure Twelve below shows that the largest sub-sector was ‘retail’, with almost £255.6m of turnover, followed by ‘product development and design’ with £103.5m.

Figure 12: Estimated distribution by sub-sector, £m

	Turnover - £m	Turnover - %
Product Development and Design	£103.5	18%
Production and Manufacturing	£70.5*	13%*
Wholesale	£89.6*	16%*
Retail	£255.6	46%*
Services	£15.1	3%
Total	£561.4	

*ONS disclosure rules mean that there are gaps in the data for some of the SIC codes within these sub-sectors. The figures presented in this table are therefore a minimum turnover. The value of the gap is £27m or 5% of the total turnover value.

3.2.4 GVA

GVA is the difference between the value of goods and services produced and the cost of raw materials and other inputs, which are used up in production. A simple way to explain GVA is to think of it in the context of the manufacturing process. During a manufacturing process goods, energy, and services are changed or consumed. The associated costs are termed ‘intermediate consumption’. At the end of the process the business has a product(s) (or “Output”) for sale or for its own use. For example, if Output comprises a wooden chair then:

- Intermediate Consumption includes the cost of wood, glue, screws, and other materials used in its manufacture, plus the cost of rental, utilities, transport, legal and business services, insurance, marketing, and other consumables.
- Selling the product (Output) generates revenue from which costs associated with the production of the product (Intermediate Consumption) can be met.
- The balance of Output less Intermediate Consumption is the firm’s GVA.

This is illustrated in Figure Thirteen below.

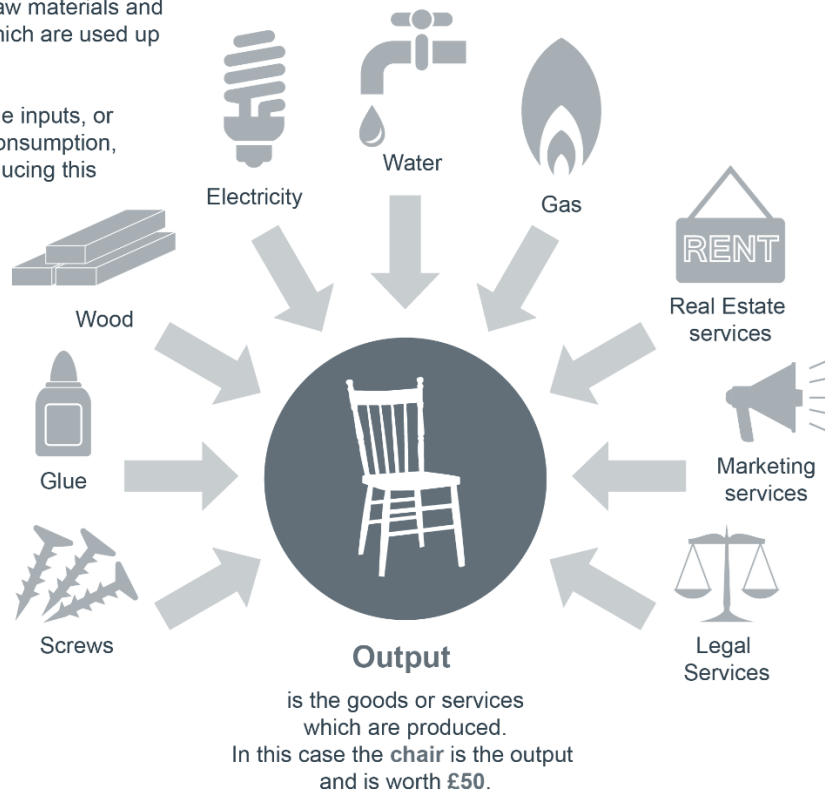
Figure 13: Illustration of GVA

Output – Intermediate consumption = GVA

Intermediate consumption

is the cost of raw materials and other inputs which are used up in production.

The value of the inputs, or intermediate consumption, going into producing this chair are £30.



This means that the GVA from this chair is:

$$\text{£50} - \text{£30} = \text{£20}$$

Source: A Guide to Gross Value Added (GVA) in Scotland

GVA was estimated for the fashion sector in the West of England using Turnover: GVA ratios. The Annual Business Survey²² estimates the annual turnover and approximate GVA for SIC codes in the UK’s non-financial business economy. This data can be converted into a Turnover: GVA ratio which can then be applied to the turnover associated with the fashion SIC codes in this report.

Figure Fourteen shows the results based on the IDBR turnover data. As there are some gaps in the turnover data for a small number of SIC codes, the total GVA reported of £205.1m is thought to underestimate the GVA by approximately 5%. Adjusting for this issue gives a GVA of £215.4m. This is equivalent to 0.5% of the region’s total annual GVA²³.

²²

<https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/bulletins/nonfinancialbusinesseseconomyukannualbusinesssurvey/2022results>

²³ ONS, Regional Gross Value Added (balance) by Industry: all Territorial Level regions, April 2024

Figure Fourteen shows that the retail sector had the highest overall GVA at 41%. This represents a smaller share than its turnover, because it has a relatively low turnover: GVA ratio. Conversely, the share of GVA associated with the ‘product development and design’ sub-sector was 27% which was higher than its share of turnover. This reflects its higher-than-average turnover: GVA ratio.

Figure 14: GVA by sub-sector

	Average Turnover to GVA ratio	GVA - £m	%
Product Development and Design	0.54	£56.1	27%
Production and Manufacturing	0.44	£31.0*	15%*
Wholesale	0.26	£23.4*	11%
Retail	0.25	£84.6	41%
Services	0.54	£10.1	5%
Total	0.338	£205.1*	

ONS disclosure rules mean that there are gaps in the data for some of the SIC codes within these sub-sectors. The figures presented in this table are therefore based on the minimum turnover in each sub-sector. It is estimated that the gaps are equivalent to 5% of the total GVA value.

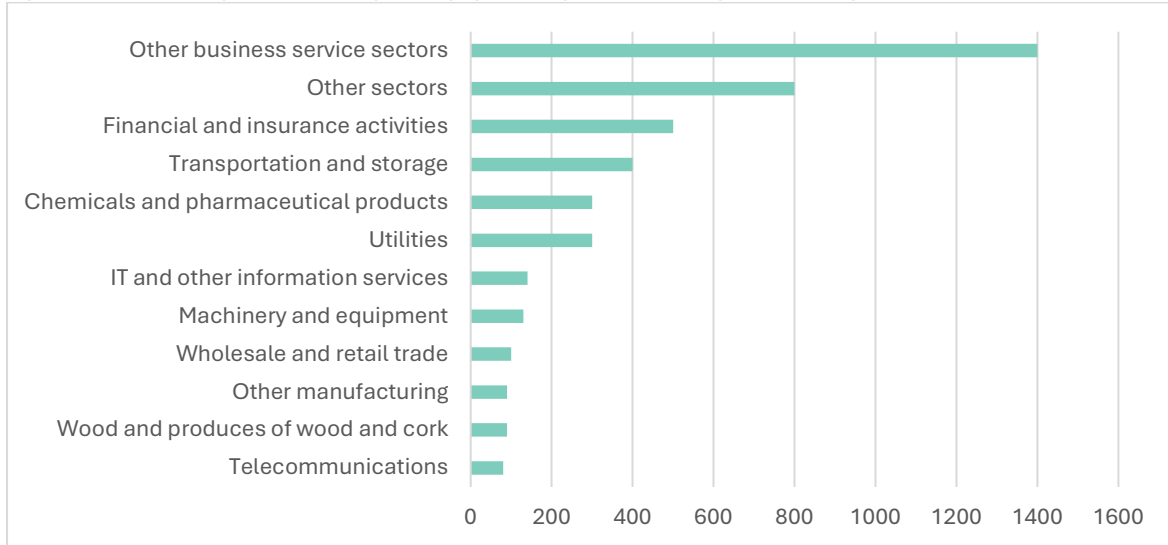
3.3 Indirect and induced economic impact

This part of the report explores the indirect and induced economic impact associated with the fashion industry. These are described as follows:

- The **indirect economic impact** is the economic activity sustained via the supply chain as a result of the fashion industry purchasing products and services from suppliers.
- The **induced economic impact** comprises the economic activity in the consumer economy stimulated by the expenditure of the wages of people directly employed in the UK fashion and textile industry and the wages that are supported along the industry’s supply chain.

Research by Oxford Economics shows that firms involved in creating and making activities across the UK fashion industry spent £4.3bn on inputs of products and services with a large variety of UK suppliers in 2021. Figure Fifteen overleaf shows that businesses offering services to other companies, including accounting, marketing and legal advice were the largest beneficiaries of the fashion and textile sector’s supply chain spending, receiving £1.4bn in 2021. That was followed by financial and insurance companies and providers of transport and storage services.

Figure 15: Estimated procurement spending by industry for the making and creating sub-sector, 2021



Source: Oxford Economics, 2021

Figure Sixteen below shows the direct, indirect and induced impact of the UK fashion and textile industry in 2021. This shows that total employment (including direct, indirect and induced jobs) was approximately 1.8 times higher than the direct employment alone and the total GVA was almost 2.5 times higher.

Figure 16: Summary of indirect and induced economic impacts from the fashion sector at the UK level

	Jobs '000	GVA £bn
Direct contribution	710	26
Indirect contribution	290	16
Induced contribution	270	20
Total contribution	1,300	62
Direct/Total multiplier	1.8	2.4

Source: Oxford Economics, 2021

However, national multipliers should not simply be applied to a regional context, because businesses in the West of England buy from a range of suppliers. Whilst some will be local to the West of England, others will be based outside the region or even outside of the UK.

Research prepared by Strategic Economics for the Combined Authority in 2016 provided high level sector multipliers (covering both indirect and induced effects) for both employment and output benefits at the West of England level.²⁴ Figure Seventeen below shows these multipliers for the broad sector groups that include fashion SIC codes. These show that relevant employment multipliers range from 1.3 to 1.5 and output multipliers range from 1.5 to 1.8. Bearing in mind the relative distribution of the employment and GVA within the fashion sub-sectors, it would be reasonable to assume an employment multiplier of 1.35 and an output multiplier of 1.55.

²⁴ West of England LEP – One Front Door Programme – Support Manual, May 2016

Figure 17: Sector multipliers for the West of England

	Employment multiplier (WoE level)	Output multiplier (WoE level)
Manufacturing	1.5	1.8
Wholesale and retail	1.3	1.5
Professional, scientific & technical	1.5	1.5
Arts, entertainment & recreation	1.4	1.6

Source: Strategic Economics, 2016

On this basis, the economic impact of the fashion sector in the West of England (including direct, indirect and induced effects) is approximately:

- 14,700 jobs (employment).
- £334m GVA.

However, this may be an under-estimate given the limitations of the data sources.

Section Four: Employment and skills in the West of England fashion ecosystem

Summary: Employment and skills

The demographics of fashion

National data shows that almost **62% of people working in the fashion sector were women**, but this is driven by the retail sub-sector, where 67% of jobs were taken by women. Similarly, the fashion sector has **a younger age profile** than the rest of the economy, providing a vital stepping stone into the world of work for many. These findings highlight the role that fashion can play in supporting **inclusive growth**.

Occupational Profile

There were 104 occupations that employ more than 10 people in the fashion sector in the West of England. These **occupations fall across all occupational groups** and whilst the majority of jobs were in lower skilled occupations such as sales and customer service, **32% of jobs were in the top three occupational groups which require higher level skills**. The diversity of roles in the sector again means that it can play an important role in supporting the inclusive growth agenda.

Skills Provision

Data from the Higher Education Statistics Agency shows that in 2021/22, higher education providers in the **West of England had 6,200 students enrolled in design, creative and performing arts courses**. The strong presence of students studying creative subjects helps to create a cultural environment that supports the development of the creative cluster in the West of England. Within this, Bath Spa University offers courses in both fashion design and textile design at an undergraduate and postgraduate level.

The HESA data also shows that in 2022/23 the region had 5,680 students enrolled in **computing** courses and 9,080 students enrolled in **engineering and technology** courses. Given the importance of digital technologies in the world of fashion this wider talent pool could be important to sector development.

This part of the report explores the nature of employment in the fashion industry in the West of England, including:

- **Demographic profile** – the gender and age profile of people working in the industry.
- **Occupational profile** – the main occupations associated with the industry and wages and skills levels associated with these.
- **Skills provision** – the number of students studying relevant content to support the sector.

It draws heavily from Lightcast data²⁵ which brings together a combination of labour market information, jobs postings, global data, skills data, compensation data and online profiles.

²⁵ <https://lightcast.io/uk>

4.1 Demographic profile

Figure Eighteen shows the gender distribution at a national level for the fashion sub-sectors analysed in this report. The table shows that 61.4% of jobs in the fashion industry in the UK were taken by women, which was higher than the average across all industries (49.1%). However, this pattern was driven primarily by the retail sub-sector where 67.2% of jobs were taken by women. This is significant, because the majority of fashion employment in the West of England is within the retail sub-sector. Conversely, 56.6% of jobs in the wholesale sub-sector were taken by men, but this was a much smaller sub-sector.

Figure 18: National Gender Profile by sub-sector, 2021

Fashion sub-sectors	Male	Female
Product development and design	48.5%*	51.5%
Production and manufacturing	49.5%	50.5%
Wholesale	56.6%	43.4%
Retail	32.8%	67.2%
Services	52.7%	47.3%
Disposal and recycling	No data	No data
All Fashion	38.6%	61.4%
All Industries	50.9%	49.1%

Source: Lightcast *should be interpreted with caution as this sub-sector also includes non fashion related design and artistic creation

Figure Nineteen shows the age distribution at a national level for the fashion sub-sectors analysed in this report. This shows that the fashion sector had a younger age profile than the rest of the economy, with 24.1% of jobs taken by 16–24-year-olds, compared to 13.1% across all industries. Again, this was driven by the retail sector, where 30% of jobs were taken by young people. This highlights the sector’s important role in providing a stepping stone into the world of work for many young people.

Figure 19: National Age Profile by sub-sector, 2021

	16-24	25-34	35-44	45-54	55-64	65+
Product development and design	14.8%	22.6%	26.3%	19.8%	14.3%	2.0%
Production and manufacturing	10.9%	22.7%	17.8%	25.0%	19.4%	4.1%
Wholesale	5%	27.8%	25.5%	24.6%	14.7%	2.3%
Retail	30.0%	26.3%	15.3%	14.7%	10.8%	3.0%
Services	14.1%	23.5%	18.9%	19.8%	19.8%	3.8%
Disposal and recycling	No data	No data	No data	No data	No data	No data
All Fashion	24.1%	25.5%	17.5%	17.1%	12.8%	3.0%
All Industries	13.1%	24.2%	21.8%	21.6%	16.0%	3.4%

Source: Lightcast

4.2 Occupational profile

Lightcast also shows the occupational make-up of an industry in percentages according to standard occupational classifications (SOC)²⁶. For example, a (simplified) staffing pattern for the industry “Hospitals” might show that 10% of jobs in the hospitals industry are occupied by surgeons, 15% by general practitioners, 20% by nurses, 5% by information technology support staff, 5% by janitors, 1% by chief executives, and so on. The SOC codes can be broken down into 9 major groups as described in Figure Twenty.

²⁶ <https://www.ons.gov.uk/methodology/classificationsandstandards/standardoccupationalclassificationsoc>

Figure 20: Major Occupational Groups

Group	Description
1 Managers, directors and senior officials	A significant amount of knowledge and experience of the production processes and service requirements associated with the efficient functioning of organisations and businesses.
2 Professional occupations	A degree or equivalent qualification, with some occupations requiring postgraduate qualifications and/or a formal period of experience-related training.
3 Associate professional occupations	An associated high-level vocational qualification, often involving a substantial period of full-time training or further study. Some additional task-related training is usually provided through a formal period of induction.
4 Administrative and secretarial occupations	A good standard of general education. Certain occupations will require further additional vocational training to a well-defined standard (e.g. office skills).
5 Skilled trades occupations	A substantial period of training, often provided by means of a work based training programme.
6 Caring, leisure and other service occupations	A good standard of general education. Certain occupations will require further additional vocational training, often provided by means of a work-based training programme.
7 Sales and customer service occupations	A general education and a programme of work-based training related to sales procedures. Some occupations require additional specific technical knowledge but are included in this major group because the primary task involves selling.
8 Process, plant and machine operatives	The knowledge and experience necessary to operate vehicles and other mobile and stationary machinery, to operate and monitor industrial plant and equipment, to assemble products from component parts according to strict rules and procedures and subject assembled parts to routine tests. Most occupations in this major group will specify a minimum standard of competence for associated tasks and will have a related period of formal training.
9 Elementary occupations	Occupations classified at this level will usually require a minimum general level of education (i.e. that which is acquired by the end of the period of compulsory education). Some occupations at this level will also have short periods of work-related training in areas such as health and safety, food hygiene, and customer service requirements.

The lightcast data (Figure Twenty One) shows that there were 104 occupations that employed more than 10 people in the fashion sector in the West of England. This shows that the sector offers opportunities across all occupational groups. Whilst the majority of jobs were in lower skilled occupations such as sales and customer service, 32% of jobs were in the top three occupational groups which require higher level skills.

Figure 21: Occupational profile for product development and design sub-sector, 2021

Major group	% of jobs	No. of occupations	Average ²⁷ of median hourly wage
1	12%	14	£20.24
2	11%	13	£21.28
3	9%	20	£16.20
4	6%	10	£13.90
5	6%	13	£13.49
6	0%	2	£12.01
7	46%	11	£12.10
8	4%	11	£12.55
9	6%	10	£11.26

Source: Lightcast

²⁷ The mean of median average hourly wage across the occupations included in each group

Figure Twenty Two below shows the top 20 occupations (by number employed). Again, this shows a wide range of occupations.

Figure 22: Top 10 occupations for product development and design sub-sector, 2021

Major Group	Occupation	No. employed	Median Hourly wages	Education level
7	Sales and Retail Assistants	3,450	£11.00	Level 2 NVQ; GCSE at grades A*-C
1	Managers and Directors in Retail and Wholesale	655	£16.60	Level 2 NVQ; GCSE at grades A*-C
2	Graphic and Multimedia Designers	590	£13.22	Honours, Bachelor's degree
7	Sales Supervisors - Retail and Wholesale	480	£12.38	Level 2 NVQ; GCSE at grades A*-C
4	Other Administrative Occupations n.e.c.	285	£12.75	Level 2 NVQ; GCSE at grades A*-C
9	Warehouse Operatives	225	£12.25	Level 1 NVQ; GCSE at grades D-G
8	Sewing Machinists	160	£10.80	Level 2 NVQ; GCSE at grades A*-C
7	Retail Cashiers and Check-out Operators	135	£10.53	Level 2 NVQ; GCSE at grades A*-C
1	Production Managers and Directors in Manufacturing	110	£25.01	Honours, Bachelor's degree
2	Newspaper and Periodical Broadcast Journalists and Reporters	105	£18.73	Honours, Bachelor's degree
7	Customer Service Occupations n.e.c.	100	£12.26	Level 2 NVQ; GCSE at grades A*-C
3	Design Occupations n.e.c.	100	£16.40	Level 3 NVQ; A Levels
3	Clothing, Fashion and Accessories Designers	100	£14.11	Honours, Bachelor's degree
9	Launderers, Dry Cleaners and Pressers	95	£10.85	Level 1 NVQ; GCSE at grades D-G
3	Advertising and Marketing Associate Professionals	95	£15.67	Honours, Bachelor's degree
7	Shopkeepers and Owners - Retail and Wholesale	95	£12.87	Level 3 NVQ; A Levels
4	Stock Control Clerks and Assistants	90	£13.69	Level 2 NVQ; GCSE at grades A*-C
3	Merchandisers	85	£11.61	Level 2 NVQ; GCSE at grades A*-C
5	Tailors and Dressmakers	80	£12.09	Level 3 NVQ; A Levels
3	Sales Accounts and Business Development Managers	80	£25.17	Honours, Bachelor's degree

Source: Lightcast

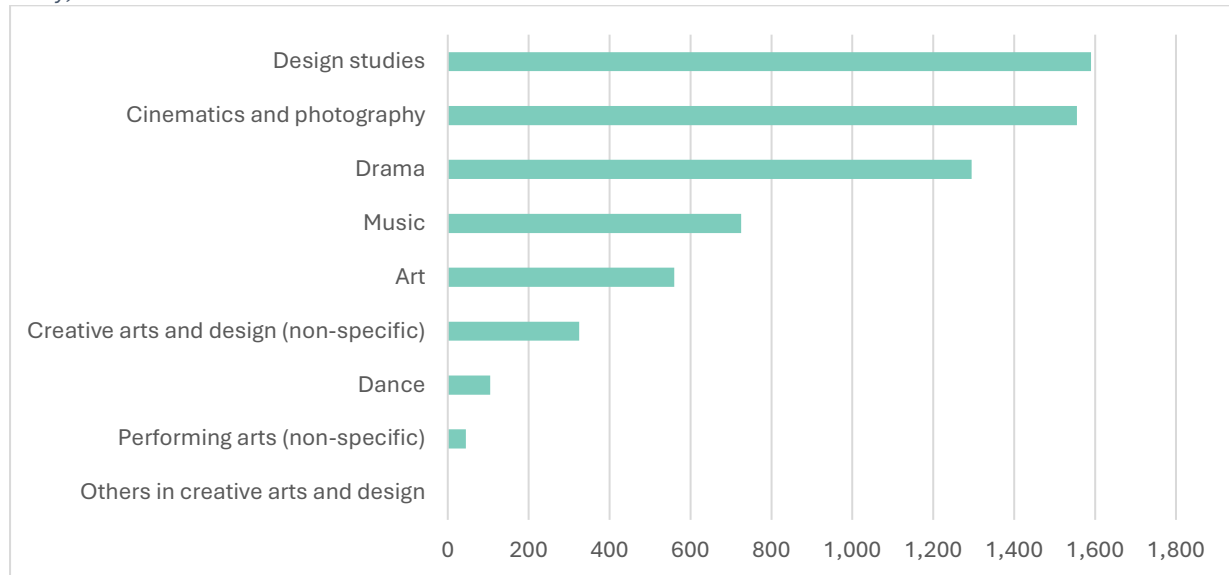
4.3 Skills provision

4.3.1 Design, creative and performing arts provision

Data from the Higher Education Statistics Agency shows that in 2021/22, higher education providers in the West of England had 6,200 students enrolled in design, creative and performing arts courses. 49% of these were enrolled at the University of the West of England, 38% at Bath Spa University and 13% at the University of Bristol (note, the University of Bath did not have any students enrolled in these courses).

Figure Twenty Three shows that the highest number of enrolments were in design studies, with almost 1,600 students, followed by cinematics and photography. Whilst some of these creative subjects may have a closer alignment with the fashion industry than others, the presence of students studying these subjects, helps to create a cultural environment that supports the development of the creative cluster in the West of England.

Figure 23: Number of students enrolled in design, creative and performing arts in the West of England by subject of study, 2022/23



Source: HESA

4.3.2 Fashion courses

Research commissioned by Bath Spa University²⁸ found that at undergraduate level in the UK in 2023, there were 1,990 acceptances onto courses that contained the term ‘Design’ and ‘Fashion’ and 635 acceptances onto courses containing the terms ‘Design’ and ‘Textiles’.

Whilst the numbers of acceptances onto undergraduate fashion design courses appear to have increased by 16% since 2019, this appears to be driven by expansion of the offer by the University of the Arts London from 3 courses to 8. Conversely, the number of acceptances onto textile design courses appears to have been decreasing year on year, with an overall reduction of around 40% between 2019 and 2023. This appears to be due to a general reduction across this group, rather than a reduction in the number of courses offered.

Bath Spa University offers courses in both fashion design and textile design at an undergraduate and postgraduate level. The number of enrolments on these courses appears to be quite variable. For instance, in 2022/23, there were 48 people enrolled in fashion design, but in 2023/24 there were only 15. Similarly, the numbers enrolled in textile design have ranged from 21 to 35 in recent years. The report does not include any data on post graduate enrolments.

Whilst the numbers of fashion students in the West of England are relatively modest, as graduates they nonetheless represent a pool of potential talent that could support the sector to grow.

²⁸ Undergraduate and taught postgraduate provision of design courses, October 2024, Data and Insights Service, Bath Spa University

4.3.3 Aligned provision

The HESA data also shows that in 2022/23 the region had 5,680 students enrolled in computing courses and 9,080 students enrolled in engineering and technology courses. Given the importance of digital technologies in the world of fashion this wider talent pool could be important to sector development.

Section Five: West of England brands and fashion culture

Summary: West of England brands and fashion culture

The fashion culture in the West of England benefits from a **small number of high profile brands**. As well as providing a wide range of employment opportunities, larger brands can provide junior positions which can help young people gain experience in the world of fashion and retain graduates in the region. They could also provide a vital **anchor role** in helping to establish the region as a fashion cluster and attract other international brands.

The area is also a host to a plethora of **small independent designers, makers and brands**. Many of these draw inspiration from the **art and culture of the countryside** as well as the area's **urban heritage**. Many of these producers sell online as well as in market venues such as the award winning **Frome Market** (just outside the West of England area). They also benefit from studio spaces, such as the [Bristol Textile Quarter](#), which offers textile students, graduates, designer-makers and start-ups alike access to affordable co-work space and equipment. However, additional workspace, studio space and showcasing space is a requirement by the sector. Alongside Frome Market, the **city of Bath**, with its cultural assets, international visitors and 5-star hotels is able to support **luxury brands and shopping**.

Sustainability appears to be an important feature for many designers and brands operating from the West of England with a significant number of them operating schemes to repair or resell unwanted clothing or to minimise the impact of their production processes. Indeed, several West of England brands have adopted '**slow**' fashion or '**circular**' approaches as a counterpoint to fast fashion. The sustainable fashion sector is supported by several retail outlets that specialise in providing space for eco-conscious businesses.

Whilst many designers and brands are grounded in artisanal and craft techniques, many are also experimenting with **digital technologies**, such as interactive tech products. Linked to this, the area is home to several researchers who are working at the cross-roads between **fashion and health innovation**. The area's innovation strengths in robotics, advanced materials and health sciences could, when linked to expertise in the fashion sector, provide new opportunities for the region.

As well as designers and brands, the area also has a number of businesses offering **sewing and dressmaking courses** which provide a vital role in helping to upskill people who want to work in the sector as well as supporting a thriving sewing community. These also sit alongside various community projects which aim to use sewing to reduce loneliness and isolation amongst disadvantaged communities.

As well as contemporary fashion, the West of England also supports several businesses operating in the 'workwear' market.

This section provides a short qualitative exploration of fashion culture in the West of England including, leading brands, supporting institutions and other assets that benefit the sector. It also explores potential opportunities for the sector to grow within the context of the wider West of England economy and innovation ecosystem. This part of the report was informed by conversations with two fashion businesses in the West of England as well as wider desk research.

5.1 A small number of high-profile businesses

The West of England and wider South West area is associated with a small number of high profile brands, including Mulberry, Super Dry and Goose and Gander. Larger brands provide a **wide range of opportunities and as well as junior positions** which can help young people gain experience in the world of fashion and retain graduates in the region. They could also provide a vital anchor role in helping to establish the region as a fashion cluster and attract other international brands, building on the area's talent base and close proximity to London, which is considered one of the world's most influential fashion capitals.

Mulberry is a British lifestyle brand which was established in 1971 and is internationally acclaimed for quality and design. Based **just outside Bath**, the company produces iconic handbags and leatherwear that are designed to last. It now employs over 1,400 people globally, with **two factories in Somerset**, a head office in London and five international offices in Paris, New York, Hong Kong, Tokyo and Seoul. Its **design inspiration is drawn from the mix of town and country**, combining authentic, age-honoured craft with an innovative fashion character. It is a signatory of the UN Fashion Industry Charter for Climate Action and is a Certified B-Corp. As such, it's services now include repairs and the Mulberry exchange.

Located in **Cheltenham in Gloucestershire**, **SuperDry** have been making world class products for 15 years and are on a mission to be a global brand. In 2020 it reportedly employed approximately 700 people at its head office in Cheltenham, which is both the creative and administrative hub for the company.

Goose and Gander is a small clothing brand located in South Gloucestershire, providing unisex clothing including tees, sweats, hoods, fleeces and more. They design all their logos in house and give them life through embroidery, DTG printing and vinyl. Founded by Maz and Olly in 2013 with a small shop, it has since grown rapidly. In 2018 they upgraded to a 5,300 sqft workspace and in 2019 they found a creative space to house the studio, marketing team and customer service.

5.2 A plethora of independent designers, makers and small brands

The area is host to a plethora of small independent designers, makers and brands. Many of these draw inspiration from the **art and culture of the countryside**, with mystical, earthy and folklore influences. For instance:

- **Rabbit** - a whimsical womenswear brand established by Sophie Spratley in 2021, which draws on a network of UK-based freelancers to produce knitwear and clothing that champion the art of handcraft.
- **Musee Roo** – designer and maker of jewellery and charms, with an online shop and sales through craft markets.
- **Tapuh** - A slow fashion clothing and art brand created by Claudia Naen to promote a seasonless wardrobe and inclusive clothing that stands against fast fashion. Tapuh

was created by Claudia in October 2020 and runs on a primarily made-to-order basis keeping the supply chain as sustainable as possible through fair working ethics and sustainable material sourcing. Current collections include 'earthbound' and 'folkwear'.

- [Jess Rose Draws](#) – a self-taught illustrator and pattern designers inspired by nature, travel, animals, antique fabric, vintage packaging and things with unusual textures.

Many of these small, independent, craft-based producers sell online as well as in **market venues** such as [Frome Market](#) (just outside the West of England), an award winning, destination street-market that takes place on the first Sunday of each month. It aims to showcase the best independent craftspeople, designers, makers, food producers and vintage traders in the South West. The market provides a vital opportunity for small designers to showcase and sell their products. They also benefit from studio spaces, such as the [Bristol Textile Quarter](#), which offers textile students, graduates, designer-makers, start-ups and 'dabblers' alike access to affordable co-work space and equipment. However, additional workspace, studio space and showcasing space is a requirement of the sector.

Alongside Frome Market, the city of Bath, with its cultural assets, international visitors and 5-star hotels is able to support **luxury brands and shopping**.

The region's designers are also **inspired the area's urban heritage**, which is influenced by urban sports such as skating as well as music. A key brand in this space is [Natra Studios](#), which mix casual wear and sportswear. It has two ranges to offer for complete transparency on the manufacturing process. The Studio range is handmade in Bristol, and all fabrics and trims are sourced locally and often made from deadstock fabrics. The Natra range is built for the community - these products are manufactured by their ethical factory in Pakistan who use only the best quality and most sustainable fabrics and trims.

Sustainability appears to be an important feature for many designers and brands operating from the West of England with a significant number of them operating schemes to repair or resell unwanted clothing or to minimise the impact of their production processes. Several West of England brands have adopted '**slow**' fashion or '**circular**' approaches as a counterpoint to fast fashion, including:

- [Ottowin Footwear](#) – which was founded by Lucy Lloyd and Oliver Cross in 2016. The company uses traditional techniques and the highest quality leather to make less than 200 pairs of 'made to order' shoes each year. With a 6-week minimum lead time, they aim to slow down fashion and re-shape customers' expectations of fashion retail.
- [Public Footpath](#) – aims to give life back to forgotten and unwanted textiles by creating unique new pieces from foraged fabrics using traditional techniques to repair, remake and regain them.
- [CoutureToYourDoor](#) is part of the WearMyWardrobeOut Collective which offer a collective of fully circular, sustainable and zero waste fashion services. CTYD has a mission to turn discarded textiles and remnants into one-of-a-kind fully customisable Couture garments and accessorise. The business uses a range of **digital technologies** to enable end-to-end customisation on products, including a digital measuring app.

The sustainable fashion sector is supported by several retail outlets that specialise in providing space for eco-conscious businesses such as [Prior](#), an independent non-profit creative arts hub, retail space, workshop and gallery and [Sparks Bristol](#), is a department store with a difference, co-created by Global Goals Centre and Artspace Lifespace.

Whilst many designers and brands are grounded in artisanal and craft techniques, many are also experimenting with **digital technologies** such as:

- [Soothe](#), which designs and makes quality sensory textiles and interactive tech products to support and comfort people living with anxiety and stress.
- [Jackey Puzey](#), an artist, designer and embroider, who creates stunning fashion and interior pieces by fusing traditional craftsmanship with digital technology such as laser cutting and digital embroidery).

As the West of England's is known for its **immersive creative technologies**²⁹, the application of digital technologies to the fashion sector may provide an exciting opportunity for sector development.

5.3 Links to health innovation

The area is also home to researchers who are working at the cross-roads between fashion and health innovation. For instance:

- Researchers from [University of Bristol and Bath](#) are developing everyday clothing that may soon be able to capture and record body movements with the use of **low voltage conductive threads** which are stitched into garment seams to create electrical circuits. Their resistance changes with the movement of the wearer's body and the work opens up new possibilities to make digital clothing which senses and captures movements much more accurately than is possible using current phones and smart watches.
- A University of the West of England (UWE Bristol) academic has been awarded £429,000 to further develop **wearable sustainable e-textiles to monitor heart patients** – a project which has the potential to save the NHS billions of pounds. The [New Investigator Award](#) (NIA) from the Engineers and Physical Sciences Research Council (EPSRC) will enable Senior Research Fellow, Dr Shaila Afroj, along with the co-investigator from the Bristol Heart Institute (BHI), to focus on developing sustainable wearable e-textiles which are biodegradable or can be recycled.
- Bristol-based [Milbotix](#) has been working on revolutionary 'Smart socks' that track rising distress in the wearer to improve the wellbeing of millions of people living with dementia, non-verbal autism and other conditions that affect communication. Milbotix's smart socks track heart rate, sweat levels and motion to give insights into the wearer's wellbeing – most importantly how anxious the person is feeling. The product joins the list of tech for good initiatives happening across the city.

As with digital technologies, the area's innovation strengths in robotics, advanced materials and health sciences could, when linked to expertise in the fashion sector, provide new opportunities for the region.

²⁹ <https://www.westofengland-ca.gov.uk/about-us/our-strategy/innovation-plan/>

5.4 A burgeoning sewing community

As well as designers and brands, the area also has a number of businesses offering sewing and dressmaking courses, including MadeMyWardrobe (see case study), Bristol School of Sewing and Textiles, CafeSewciety, Creative Space Bristo, Flow Jo Fabrics, Sew Easy and many others. These provide a vital role in helping to upskill people who want to work in the sector, as well as supporting a thriving sewing community. These sit alongside community projects such as [‘Stitching Together’](#) which aims to reduce loneliness and isolation by bringing together local volunteers and refugee and asylum seeking women of all ages and nationalities, to share sewing skills, practice English and build friendships.

CASE STUDY: Made my Wardrobe

Disillusioned with the high street and fast fashion, on the 1st January 2016 Lydia Higginson, a trained Costume Maker and Designer for theatre, decided to start making her entire wardrobe from scratch. By the end of that year, she had made over 60 garments and given away all the clothes that she had ever bought from shops. Along the way, she learned a vast range of skills and built a small community of online followers who were interested in sewing and wanted to learn how.

Responding to this interest, she started teaching workshops and built her confidence as a teacher with simple designs. 8 years on, [Made My Wardrobe](#) has grown organically into a business with a team of 6 freelance fashion practitioners operating from a textile studio in central Bristol. The business currently:

- Teaches a wide range of sewing workshops from quilts and embroidery to pattern cutting and garment construction.
- Designs and makes sewing patterns so that anybody, no matter where they are in the world, can learn to make the clothes they dream of wearing.
- Imports sustainable (Ecotec certified) fabrics and sell the best PFAFF sewing machines.’

As well as regular workshops, the company also invites guest speakers to deliver specialist sessions in more niche areas such as screen printing, natural dyes and bra making to name but a few. Whilst Lydia moved back to Bristol for family reasons, it has proved to be an excellent place to start her business. In Lydia’s words:

“Bristol is a big enough city, with enough people that share a passion or interest in sewing. It also has a real DIY spirit and a community of other artists and makers who are up for collaboration and supporting things. As the business has grown and people have come from further afield to attend our workshops (including from abroad) its connectivity has also been useful”

Whilst Made My Wardrobe imports most of its fabrics, they work closely with other artists, makers and creative organisations in the region to deliver collaborative projects and support each other to grow. Starting out in the [Bristol Textile Quarter](#), Lydia is still close to the contacts that she made there and there are two other fashion businesses operating out of their current building.

Looking to the future potential of the sector, Lydia felt the region could support fabric and fashion production with dedicated production spaces (recognising that textiles and fashion production require more space than office related activities), exhibition space and technical/vocational training opportunities.

5.5 As well as established providers of workwear

As well as contemporary fashion, the West of England also supports several businesses operating in the 'workwear' market such as:

- **Bristol Uniforms Ltd** - a leading designer and manufacturer of protective clothing for emergency services in the U.K. and across the globe. Founded in 1801 as a clothing manufacturer in Bristol, the company has been a pioneer in the development of specialist firefighter PPE and protective workwear for the utility industry for more than 60 years. Today, Bristol Uniforms employs approximately 200 people. Its garments are sold via a network of approximately 70 experienced distributors. In 2021 it was acquired by global safety manufacturer MSA Safety Incorporated in an all-cash transaction valued at approximately \$60m
- **Mathias** - Established in 1952 and based in Avonmouth, Matthias supply innovative PPE and workwear solutions to a range of industries and businesses across the UK, including Sky, Virgin Media, Kuene+Nagel, Longleat, utilita, EDF energy and many more. Following considerable capital investment over the last 20 years into the company's infrastructure, it now employs 40FTE.

Section Six: Conclusions and Recommendations

Why fashion?

The research has shown that the fashion sector **makes an important contribution to the West of England economy**. With at least 1,145 businesses operating in the sector, it directly employs approximately 10,890 people and contributes £215.4m in the way of GVA to the economy – equivalent to 0.5% of the region's GVA. When indirect (supply chain) and induced (spending of wages) effects are taken into account, the economic value of the sector in the West of England is estimated to be **14,700 jobs and £334m GVA**. However, this is likely to be an under-estimate, as many 'businesses' operating in the sector are run on a self-employed basis or fall below the thresholds required to be picked up in official registers.

The sector can also make a significant contribution to the region's **inclusive growth agenda**. The research found that the sector employs a higher proportion of **women and younger people** than the rest of the economy. Whilst this may, in part reflect the composition of the retail sector (which accounts for the majority of known employment) it can also be observed in the ownership of the various small independent brands highlighted in the final chapter of this report. Women play a vital role in this sector in the West of England and therefore, fashion could provide a useful counter-point to many of the somewhat male dominated sectors that have been prioritised in the West of England in recent years. The sector also offers opportunities across a **wide spectrum of occupations and skills levels**, making it accessible to a wide range of people.

The sector has **strong overlaps with wider creative, digital and technology sectors** through both supply chains, collaborative projects and businesses which span more than one sector. It therefore has the potential to **add value to these sectors** through economic spill-over effects.

Opportunities for growth

The West of England has **many of the ingredients necessary to grow its fashion sector**. It is **close enough to London** to benefit from the capital's leading role in the fashion industry, whilst being far enough away to offer more affordable housing. It has a **strong creative talent base** and culture which is attractive to creative people. At the same time, the region benefits from a broader **digital and technological skills base**, which is now an important part of the fashion industry, with many jobs in the fashion sector, being 'digital jobs'. The intersection between the world of fashion and digital may be an interesting angle for partners in the West of England to explore further in the next stage of this research. In particular, how digital technologies may help to overcome some of the challenges facing the industry or conversely how digital fashion can help address other societal challenges (e.g. health).

It may be useful in the next stage of the research to explore with industry stakeholders whether the region would benefit from **attracting a large fashion brand** in order to provide progression opportunities (e.g. junior positions) for young people wanting to work in the world of fashion.

The research also found evidence of a strong groundswell of businesses and independent brands that have a strong focus on delivering **sustainable fashion solutions**. It may be useful in the next stage of research to try and better understand the needs of this group and how they could be supported further.

Appendix One: Existing definitions

SIC Code	Description	ONS	Oxford Economics
Production and Manufacturing			
0116	Growing of fibre crops		Yes
1310	Preparation and spinning of textile fibres	Yes	Yes
1320	Weaving of textiles	Yes	Yes
1330	Finishing of textiles	Yes	Yes
1391	Manufacture of knitted and crocheted fabrics	Yes	Yes
13921	Manufacture of soft furnishings	Yes	Yes
13922	Manufacture of canvas goods, sacks, etc.	Yes	Yes
13923	Manufacture of household textiles	Yes	Yes
13931	Manufacture of woven or tufted carpets and rug	Yes	Yes
13939	Manufacture of other carpets and rugs	Yes	Yes
1394	Manufacture of cordage, rope, twine and netting	Yes	Yes
1395	Manufacture of non-wovens and articles made from non-wovens, except apparel	Yes	Yes
1396	Manufacture of other technical and industrial textiles	Yes	Yes
1399	Manufacture of other textiles n.e.c.	Yes	Yes
1411	Manufacture of leather clothes	Yes	Yes
1412	Manufacture of workwear	Yes	Yes
14131	Manufacture of other men's outerwear	Yes	Yes
14132	Manufacture of other women's outerwear	Yes	Yes
14141	Manufacture of men's underwear	Yes	Yes
14142	Manufacture of women's underwear	Yes	Yes
1419	Manufacture of other wearing apparel and accessories n.e.c.	Yes	Yes
1420	Manufacture of articles of fur	Yes	Yes
1431	Manufacture of knitted and crocheted hosiery	Yes	Yes
1439	Manufacture of other knitted and crocheted apparel	Yes	Yes
1511	Tanning and dressing of leather; dressing and dyeing of fur	Yes	Yes
1512	Manufacture of luggage, handbags and the like, saddlery and harness	Yes	Yes
1520	Manufacture of footwear	Yes	Yes
2060	Manufacture of man-made fibres		Yes
2314	Manufacture of glass fibres		Yes
2894	Manufacture of machinery for textile, apparel and leather production		Yes
3103	Manufacture of mattresses		Yes
3212	Manufacture of jewellery and related articles	Yes	
3213	Manufacture of imitation jewellery and related articles	Yes	
4664	Wholesale of machinery for the textile industry and of sewing and knitting machines	Yes	Yes
Wholesale			
4616	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods	Yes	Yes
4624	Wholesale of hides, skins and leather	Yes	Yes
4641	Wholesale of textiles	Yes	Yes
4642	Wholesale of clothing and footwear	Yes	Yes
4648	Wholesale of watches and jewellery	Yes	
Retail			
4719	Other retail sale in non-specialised stores		Yes (33%)
4751	Retail sale of textiles in specialised stores	Yes	Yes
4753	Retail sale of carpets, rugs, wall and floor coverings in specialised stores	Yes	Yes

4764	Retail sale of sports goods, fishing gear, camping goods, boats and bicycles		Yes (33%)
4771	Retail sale of clothing in specialised stores	Yes	Yes
47721	Retail sale of footwear in specialised stores	Yes	Yes
47722	Retail sale of leather goods in specialised stores	Yes	Yes
4777	Retail sale of watches and jewellery in specialised stores	Yes	
47782	Retail sale by opticians	Yes	
47820	Retail sale via stalls and markets of textiles, clothing and footwear	Yes	Yes
Services			
7410	Specialised design activities		Yes (50%)
9003	Artistic creation	Yes	
9523	Repair of footwear and leather goods	Yes	Yes
9524	Repair of furniture and home furnishings	Yes	Yes
9525	Repair of watches, clocks and jewellery	Yes	
9601	Washing and (dry-)cleaning of textile and fur products	Yes	Yes
77299	Renting and leasing of other personal and household goods		Yes (9%)
Not listed	Fashion and textile education		Yes