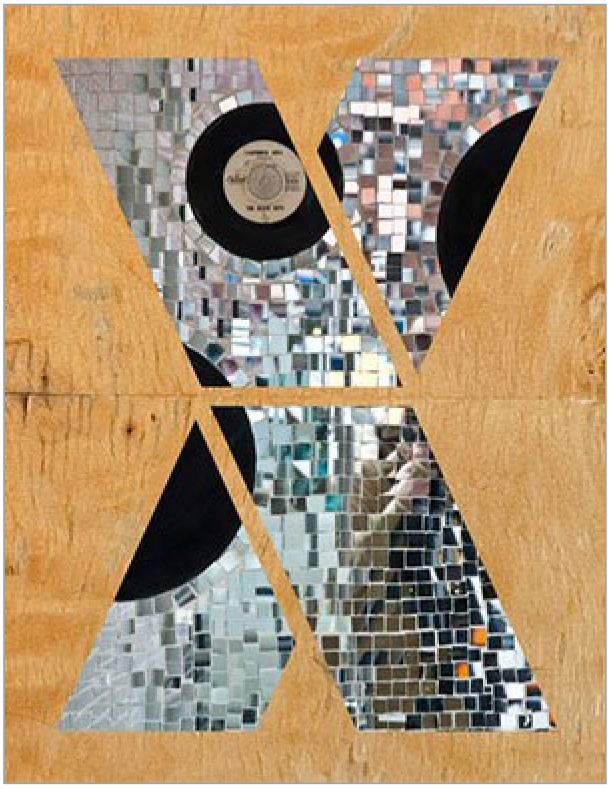

Data - May 2014

New York’s Design Economy

As New York City opens its second annual design week, this data analysis documents the continued economic importance of New York City’s design sector. It shows that New York has 65 percent more designers than any other metro area in the U.S., and that employment at city design firms increased by nearly 10 percent since the 2008 recession.

New York City’s second annual design week, NYCxDesign, will make its debut tomorrow, showcasing the city’s powerful assets in a range of design fields. With hundreds of exhibits, studio visits and talks taking place across the five boroughs between May 9th and May 20th, NYCxDesign aims to raise the profile of one of the city’s most important and underappreciated economic sectors.

Without a doubt, the architecture and design sector is a critical and growing part of New York City’s economy. As this analysis documents, in 2013 the New York City metro area was home to 40,340 full-time designers. That is far and away more designers than any other metro area in the U.S., with the next largest pool in Los Angeles, which has 24,460, followed by Chicago (16,100). The number of designers in New York is also up significantly from 2010, when there were 38,340 designers, and 2000, when there were 23,143. These designers work not only at architecture and design companies, but in a wide variety of industries, including the arts, media, advertising, healthcare, retail, manufacturing, real estate, and financial services.

New York City is also an international hub for design firms working in fashion, architecture, landscape architecture, interior design, industrial design, and graphic design. Overall, the city is home to 3,884 firms in these six subsectors, compared to 2,731 in Los Angeles and 2,358 in Chicago.

Although employment at design firms dipped in the wake of the 2008 financial crisis, the number of design sector jobs bounced back quickly after the economy started to pick up again. Between 2010 and 2012, the number of employees at city design firms increased by nearly 10 percent, going from a post-recession low of 22,015 in 2010 to 24,079 two years later. In the ten years between 2003 and 2012, employment in the city's design sector increased 23 percent.

Citywide, three different design fields saw increases of at least 20 percent in the number of firms between 2003 and 2012: fashion design (with a 38 percent increase in firms), landscape design (+32 percent) and architecture (+24 percent). The number of firms increased by smaller amounts in other design fields, including interior design (+12 percent), industrial design (+7 percent) and graphic design (+2 percent).

Over this period, Brooklyn and Queens have both outpaced Manhattan in the growth of design firms. While the number of all design firms in Manhattan increased by just 6 percent during this time, Brooklyn experienced a 101 percent gain and Queens a 45 percent gain. Brooklyn experienced a significant spike in firms in nearly every design field, including architecture (149 percent increase), fashion design (+119 percent) and graphic design (+115 percent). Queens saw a 63 percent increase in architectural firms and a 61 percent increase in interior design firms. Over the same period, Manhattan experienced a 24 percent increase in fashion design firms, a 14 percent increase in architecture firms, and a 12 percent *decrease* in graphic design firms.

However, though the rate of growth is higher in Brooklyn and Queens, Manhattan is still very much the center of the city's design sector; the borough is home to 2,989 firms employing 21,684 people, compared to 532 firms employing 1,472 people in Brooklyn and 273 firms employing 785 people in Queens.

This report is a follow-up to several previous reports published by the Center for an Urban Future about the economic importance of New York's design industries, including Growth By Design (2011), Designing New York's Future (2012) and 8 Ways to Grow NYC's Design Sector (2013).

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/images/uploads/New-Yorks-Design-Economy-01-Professional-Desingers-Working-in-the-NY-

Source: Occupational Employment Survey (OES); Bureau of Labor Statistics (BLS), 2013. New York-White Plains-Wayne Metro Division. See Note 1.

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/images/uploads/New-Yorks-Design-Economy-02-Top-US-Metro-Areas-by-Number-of-Practic

Source: OES; BLS, 2013. Numbers represent Metro Division estimates. See Note 2.

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/images/uploads/New-Yorks-Design-Economy-03-Top-US-Cities-by-Number-of-Design-Firms

Source: Quarterly Census of Employment and Wages (QCEW); BLS, 2012. Numbers represent county level estimates. See Note 3.

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/images/uploads/New-Yorks-Design-Economy-04-Number-of-Employees-at-NYC-Design-Firm

Source: QCEW; BLS, 2003-2012.

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/images/uploads/New-Yorks-Design-Economy-05-Percent-Change-in-Number-of-NYC-Design

Source: QCEW; BLS, 2003-2012.

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Source: QCEW; BLS, 2003-2012.

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Source: QCEW; BLS, 2003-2012.

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Source: QCEW; BLS, 2003-2012.

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Source: QCEW; BLS, 2003-2012.

Growth of Design Firms in New York City: 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Graphic Design Firms	1000	973	958	981	1040	1083	1049	1032	1017	1018
Industrial Design Services	99	99	104	106	110	118	119	115	111	106
Interior Design Services	692	691	728	750	816	866	846	815	788	775
Total NYC Design Firms	3340	3366	3459	3578	3848	4058	3969	3911	3880	3884
Architectural Firms	1073	1095	1149	1224	1295	1342	1323	1315	1330	1333
Landscape Architectural Services	62	86	90	88	93	99	92	86	82	82
Fashion Design Firms	414	422	430	429	494	550	540	548	552	570

Source: QCEW; BLS, 2003-2012.

Growth of Design Firms in Brooklyn: 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Landscape Architectural Services	12	14	14	12	13	14	12	10	11	14
Interior Design Services	50	53	53	63	68	67	64	66	59	65
Industrial Design Services	16	17	17	18	23	26	26	29	30	27
Total Brooklyn Design Firms	265	283	282	315	373	430	430	457	491	532
Graphic Design Firms	85	90	90	102	115	141	139	154	168	183

Fashion Design Firms	37	38	38	38	50	60	63	69	73	81
Architectural Firms	65	71	70	82	104	122	126	129	150	162

Source: QCEW; BLS, 2003-2012.

Growth of Design Firms in Queens: 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Industrial Design Services	9	6	6	5	6	7	8	8	8	7
Landscape Architectural Services	12	12	13	13	11	10	10	11	11	12
Graphic Design Firms	53	52	50	53	54	58	60	58	64	65
Total Queens Design Firms	2077	196	213	230	252	271	269	258	264	273
Interior Design Services	38	39	44	49	64	70	71	62	58	61
Architectural Firms	63	69	82	90	94	100	96	95	96	103
Fashion Design Firms	13	18	18	20	23	26	24	24	27	25

Source: QCEW; BLS, 2003-2012.

Growth of Design Firms in Manhattan: 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Graphic Design Firms	856	819	805	811	852	866	830	801	766	752
Industrial Design Services	70	70	75	77	77	80	80	73	69	68

Landscape Architectural Services	50	53	55	57	63	67	62	59	55	51
Total Manhattan Design Firms	2833	2804	2873	2937	3119	3254	3166	3098	3029	2989
Interior Design Services	590	586	613	624	667	711	692	670	656	636
Architectural Firms	903	913	953	1001	1045	1074	1058	1051	1042	1029
Fashion Design Firms	364	363	372	367	415	456	444	444	441	453

Source: QCEW; BLS, 2003-2012.

Design Industry Employment by Borough

Brooklyn	2003	2010	2011	2012
Architectural Firms	299	387	506	551
Landscape Architectural Services	27	21	82	92
Interior Design Services	110	167	130	139
Industrial Design Services	18	67	88	88
Graphic Design Firms	128	285	335	425
Fashion Design Firms	100	124	141	177
Brooklyn Design Firms Employees	682	1051	1282	1472
Bronx	2003	2010	2011	2012
Architectural Firms	13	13	11	11
Landscape Architectural Services	ND	15	ND	ND
Interior Design Services	16	11	11	12
Industrial Design Services	ND	ND	ND	ND
Graphic Design Firms	4	9	14	13

Fashion Design Firms	ND	16	11	10
Bronx Design Firms Employees	33	64	47	46
Queens	2003	2010	2011	2012
Architectural Firms	230	297	287	323
Landscape Architectural Services	ND	16	14	21
Interior Design Services	116	129	138	178
Industrial Design Services	18	ND	ND	ND
Graphic Design Firms	136	132	135	195
Fashion Design Firms	44	48	74	68
Queens Design Firms Employees	544	622	648	785
Manhattan	2003	2010	2011	2012
Architectural Firms	9053	10396	10788	11406
Landscape Architectural Services	330	346	304	323
Interior Design Services	2134	2166	2255	2399
Industrial Design Services	253	350	252	264
Graphic Design Firms	4536	4260	4464	4317
Fashion Design Firms	1904	2663	2563	2975
Manhattan Design Firms Employees	18210	20181	20626	21684
Staten Island	2003	2010	2011	2012
Architectural Firms	113	72	74	75
Landscape Architectural Services	ND	ND	ND	ND
Interior Design Services	17	15	14	17
Industrial Design Services	16	ND	ND	ND

Graphic Design Firms	ND	10	ND	ND
Fashion Design Firms	ND	ND	9	ND
Staten Island Design Firms Employees	146	97	97	92

Source: QCEW; BLS, 2003-2012. See Note 4.

Notes

1. Because survey data was suppressed for select occupational categories in 2001, 2003, 2004 and 2011, an average of the year before and year after was used. For 2000, 2001, 2002 and 2003, an average of subsequent years was used for the 'Designers, All Other' category, since it was first introduced in 2004. Note also that the New York-White Plains-Wayne Metro Division definition changed slightly in 2005 to include three additional counties in New Jersey. Part of the increase between 2004 and 2005 should therefore be attributed to that change

2. Metro Division definitions are as follows: Boston (Boston-Quincy NECTA Division); Chicago (Chicago-Naperville-Joliet Metro Division); Dallas (Dallas-Plano-Irving Metro Division); Los Angeles (Los Angeles-Long Beach-Glendale Metro Division); Miami (Miami-Miami Beach-Kendall Metro Division); San Francisco (San Francisco-San Mateo-Redwood City Metro Division); Seattle (Seattle-Bellevue-Everett Metro Division).

3. County definitions are as follows: New York City (Bronx, Kings, Queens, New York, Richmond); Chicago (Cook); Dallas (Dallas); Los Angeles (Los Angeles); Miami (Miami-Dade); San Francisco (San Francisco); Seattle (King); Philadelphia (Philadelphia).

4. ND: Not Disclosable -- data did not meet BLS or State agency disclosure standards.

This data analysis was researched and written by David Giles and Xin Wang. Design by Ahmad Dowla.

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