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Unpicking the fashion city: Theoretical issues and ideal types
An empirical analysis of London

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Patrizia Casadei

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Supervisor – Prof. Luciana Lazzeretti

Doctoral Committee

– Prof. Andy Pratt

– Prof. Marco Musella

– Prof. Gilberto Antonelli

Abstract

Local governments, 'urban-booster' commentaries and some academic approaches have increasingly focused on the idea of the 'fashion city' as a strategic factor for the economic development, growth and regeneration of major and minor cities across the world. Nowadays, in addition to established fashion's world cities, there has been a proliferation of new fashion centres that have been termed as 'second-tier' cities of fashion. The growing and crucial importance of fashion in urban development strategies, together with the current diversity and variety of fashion centres, has created the need to broaden the knowledge of what constitutes a fashion city. To this day, either in academic or local policy field, little attention has been paid to defining the key elements that form a contemporary fashion centre. In light of these considerations, the aim of the present dissertation is to contribute to furthering the understanding of the actual meaning and significance of this concept and to possibly identifying distinctive models of fashion centres. Furthermore, the research seeks to explore the best suited methodologies to analyse the complexity and heterogeneity of contemporary fashion cities. The research is structured in four chapters, which address three main objectives.

The first objective is to systematize the existing body of cross-disciplinary academic literature on the topic into a precise theoretical framework. In this regard, Chapter 1 presents a state of the art of fashion's relation with cities by adopting a specific 'creative approach', which primarily focuses of fashion design as a cultural and creative industry (CCI) and on fashion designers as an example of the wider 'creative class'. This analysis directs attention to a particular example of fashion centre that has been termed as the 'creative fashion city'. The second objective is to develop an analytical framework to address the current heterogeneity of contemporary fashion centres. Chapter 2, drawing upon an extensive analysis of fashion's world cities and 'second-tier' cities of fashion, suggests a framework of analysis for thinking about the diverse nature of fashion's relation with the urban. It identifies multiple models of fashion's world cities, as well as contrasting patterns in the development of newer fashion centres. Most importantly, through the adoption of Weber's ideal type approach, it proposes three ideal types of fashion cities ('manufacturing', 'design fashion' and 'symbolic'), which function as heuristic device to address the distinctive characteristics of fashion centres and to discuss future development pathways. The final and third objective is to understand how 'real' fashion cities can be studied, analysed and plotted on the ideal type model. To meet this objective, Chapter 3 and Chapter 4 present two analyses of London from a 'supply'- and

'demand-side' perspective. The first one is based on the execution of 23 semi-structured interviews with key actors from London's fashion ecosystem, as well as statistics and policy documents, to analyse the 'material' elements that underlie the development, transformation and current nature of this fashion centre. The second one explores the meaning embedded in two samples of around 30,000 tweets, which were collected at different times, to highlight the 'symbolic' representation of London as a fashion city on the social media platform Twitter. Both the 'supply'- and 'demand-side' analyses draw a picture of London as a fashion centre that tends towards the ideal type of the 'symbolic fashion city'.

The present dissertation has implications either for the academic and local policy field. It contributes to investigating the importance of different kinds of position that fashion plays in urban economies, drawing attention to fashion's qualities as rather more than a conventional urban CCI. There emerges a growing emphasis on the symbolic economy as a tool for cementing the reputation of contemporary fashion centres, either specialised in manufacturing, fashion design or image-making activities. Furthermore, the ideal type approach complements and extends the now very familiar division between 'fashion's world cities' and 'second-tier cities' and shifts away from the simplistic 'tool-kit' approach that has sought to promote new fashion centres as developing versions of 'models' set by established fashion's world cities. In this respect, the accentuated ideal type of the 'symbolic fashion city' points to the risks of what can described as a 'hollowing-out' of the fashion city, which is detached not only from making and designing clothing but also from urban fashion cultures. Thus, what is important is not about fixed strategies for the development of a fashion centre, but the need for ad-hoc fashion policies specifically adapted to different historical and cultural local contexts.

Keywords: fashion city, ideal types, London, urban symbolism, text mining.

Table of Contents

List of Tables

List of Figures

APPENDIX B

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'La città è ridondante: si ripete
perché qualcosa arrivi a fissarsi nella mente. [...]
La memoria è ridondante: ripete i segni
perché la città cominci a esistere'

--- Italo Calvino, *Le città Invisibili*

The city is redundant: it repeats itself
so that something will stick in the mind. [...]
Memory is redundant: it repeats signs
so that the city can begin to exist.

--- Italo Calvino, *The Invisible Cities*

Introduction

In recent years, the idea of the 'fashion city' has emerged as a potential model for local economic development and as a strategic factor for the growth, revitalization, and competitiveness of major and minor cities across the world (Breward and Gilbert, 2006). Urban authorities, policy-makers and various academic approaches have devoted increased attention to this phenomenon. The concept of the fashion city has appeared in many strategic plans and promotional activities of local governments that have sought to reposition cities as attractive destinations for firms, human capital, investments, consumers, and tourism. Moreover, such a phenomenon has drawn the attention of academic research from different disciplinary fields, which have variously posited fashion's relation with cities as the subject of an increasing number of studies. As a consequence, nowadays, in addition to traditional 'fashion's world cities' (particularly New York, Milan, Paris and London), a rising number of cities in developed and developing countries have achieved the status of 'second-tier' cities of fashion (Larner et al., 2007). Antwerp, Amsterdam, Bangkok, Barcelona, Dakar, Hong Kong, Istanbul, Jaipur, Lagos, Lisbon, Melbourne, Moscow, Nairobi, Vienna and Warsaw are only a few examples of these alternative centres of fashion production, design, consumption, and culture.

Although these cities have very different economic and cultural contexts, they indicate the growing and crucial importance of fashion in urban development strategies. This creates the need to enhance the knowledge of what constitutes a fashion city. However, as it will be pointed out below, this concept is still weakly codified and can mean very different things in different contexts. To this day, both scholars and policy-makers have paid little attention to defining what characteristic elements form a fashion centre. Several recent attempts to promote fashion cities have drawn upon a simplistic 'tool-kit' approach, which regards these centres as mere developing version of 'models' set by established fashion's world cities. Perhaps, in the academic literature, the clearest analysis of the idea of the 'fashion city' comes in Scott's discussion of factors required to move Los Angeles to the front rank of 'world fashion centres', competing directly with 'New York, Paris, Milan and London' (Scott, 2002, p. 1304). The author suggests a number of requirements that include: a 'flexible manufacturing basis'; a dense cluster of specialist high-quality sub-contractors; major training and research institutes; regionally-based but internationally recognised promotional vehicles including fashion media and fashion shows; an evolving fashion and design tradition with

strong place-based specific elements; formal and informal connections between the fashion industry and other cultural product industries (particularly Hollywood).

However, even in 2002, this list seemed to look back towards the development of fashion's world cities of the twentieth century. Over time, there has been a diversification of the relationship between fashion and cities. While traditional fashion centres have evolved, newer fashion cities have developed only particular elements of this pathway (Gilbert, 2013). Since the early 1970s, economic globalization has profoundly altered the geographies of the fashion industry and has accentuated the separation between physical and symbolic production of fashion (Skov, 2011). Offshoring and the relocation of manufacturing to lower-cost cities, together with the development of 'fast fashion' production systems and the enhanced use of Information Technology (IT), have weakened the significance of local flexible production and craft skills. Fashion manufacturing has been relocated away from Europe and North America to India, China, Morocco, Turkey, Africa, South America, and Eastern Europe, and all of fashion's world cities have shifted towards more symbolic and design-intensive activities (Evans and Smith, 2006; Huang et al., 2016). Also because of changes in the 'symbolic economy' of media, promotional activities, and events, as well as developments in forms of retailing, shopping, and consumption, over time, 'symbolic production of fashion' has become more important than 'physical manufacturing of garments' in the revamping of established fashion centres and the development of new ones (Kawamura, 2006).

Before going any further, it is important to clarify the meaning of the terms 'fashion industry' and 'designer fashion industry' as interpreted in the present research. While the former is regarded as a broad sector that includes the whole range of fashion-related activities such as fashion manufacturing, design, education, retail, wholesale, media, marketing and also other creative industries, the latter refers only to the creative and design element of fashion production and to the activity of fashion designers. In this regard, the contemporary fashion industry combines a highly globalised manufacturing chain located predominantly in lower-cost cities, with a 'designer fashion industry' often concentrated in fashion's world cities and newer cities of fashion, together with a series of image-producing activities like fashion retail, media, and event-organization.

At first glance, in a world where many cities have suffered from a massive decline of traditional manufacturing and a pervasive process of de-industrialization, this phenomenon can be framed within the growing emphasis of forms of intangible production as 'instrumental' means of regenerating urban economies and positioning cities in the global value chain (Pratt,

2010; Scott, 2014). In particular, in the last two decades, the words 'creativity' and 'culture' have appeared in an increasing number of urban development strategies oriented towards the fostering of Cultural and Creative Industries (CCIs), creative clusters, cultural production, and creative people in cities (Hall, 2000; Florida, 2002; Lazzeretti, 2009). The designer fashion industry has received increased attention as a central element of the cultural economy and as a significant example of the CCIs (DCMS, 2001; Scott, 2004). Increasing awareness of its economic and cultural significance has led to its inclusion in many initiatives aimed at revamping urban economies through CCIs. Fashion design has also become an important identity-creator capable of building cultural capital of cities and of marking cities as 'creative places' (Potvin, 2009). Hence, a growing number of local governments outside fashion's world cities (e.g., Auckland, Copenhagen, Toronto) have paid growing attention to developing designer fashion industries as a means of promoting local creativity and cultural distinctiveness for competing in the globalised economy (Melchior, 2011; Leslie et al., 2014).

However, this approach that focuses solely on fashion design for the viability of a fashion city does not exhaust the variety of local strategies that have been recently adopted for the promotion and revamping of fashion centres. The review of the literature quickly reveals the current large heterogeneity of fashion cities that have developed through different mixings of design activities, symbolic economy, consumption, and also manufacturing elements. In addition to fashion design, image-making activities like fashion retail, media, and event-organization have played an important role in the development and regeneration of fashion centres (Jansson and Power, 2010). Moreover, there is also significant potential for cities that are associated with the geographies of fashion manufacturing. As an example, while the establishment of Antwerp as a fashion centre has primarily focused on a city-branding process that prioritised media, museum initiatives and cultural events (Martínez, 2007), Florence has been able to maintain its long-standing reputation in fashion thanks to a powerful manufacturing sector specialised in the production of leather goods (Lazzeretti et al., 2017). In short, there is now very significant diversity in the nature of fashion centres, where fashion is an important element of the local economy and wider reputation of cities. This has increased the need to further the understanding of the fashion city concept and clarify its meaning in the contemporary scenario.

Over time, fashion's relation with cities has generated a great deal of interest among international scholars from different disciplinary fields, which range from sociology, economic history and place branding, to creative and cultural studies, economic geography

and regional and urban studies. A substantial body of research has focused on the analysis of established and newer fashion cities from an economic, sociological, and cultural perspective. A number of studies have explored the historical development, economic structure, and more recent transformation of fashion's world cities from manufacturing hubs into more design-oriented fashion centres (Rantisi, 2004a; Evans and Smith, 2006; Williams and Currid-Halkett, 2011). Another stream of research has addressed the inclusion of fashion design within CCIs-oriented policies aimed at revamping cities by means of urban creativity (Larner et al., 2007; Hu and Chen, 2014; Pandolfi, 2015). Some scholars have investigated the role of fashion as a powerful image-creator capable of marking cities as new 'symbolic' places of fashion culture (Martínez, 2007; Chilese and Russo, 2008; Jansson and Power, 2010). Further research has focused on some distinctive characteristic elements of both traditional and emerging fashion centres like structure of the fashion industry, nature of the education system and fashion designers' behaviour (McRobbie, 1998; Leslie and Brail, 2011; Pratt et al., 2012).

However, these studies come from different disciplinary fields and have adopted diverse approaches to analyse fashion's relation with the urban. The idea of the fashion city has not yet been addressed from a unique perspective. Academic research on the topic is extensive, but not focused around a common theoretical groundwork that is needed for a real understanding of the phenomenon. To this day, it does not exist a structured definition of the topic, and very limited research has sought to develop a precise theory that might explain the significance, meaning, and nature of such a phenomenon. What is lacking is a clear theoretical framework that combines and sheds light on the main ideas and concepts that have been developed on the topic and frames these within broader existing theories. Moreover, there is very little work that has attempted to make systematic sense of the current heterogeneity and complexity of fashion cities. The large variety and diversity of fashion centres indicates the limitation of thinking about a single, undifferentiated and unchanging category of the fashion city. This argues for the need to address multiple and different typologies of fashion centres, analysing the main diversities and commonalities in established and more recent fashion cities.

In view of these considerations, the aim of the present dissertation is to contribute to enhancing the understanding of the actual meaning and significance of the concept of the fashion city in the contemporary scenario, and to shed light on possible distinctive typologies of fashion centres that consist of different mixings of key elements. In particular, the research seeks to answer the questions of what the term 'fashion city' means, and whether it is possible

4

to identify multiple models of fashion centres. Moreover, it also investigates how 'real' fashion cities might be analysed and framed within an analytical structure of fashion centres. More specifically, the entire research addresses three main objectives: the first one is to systematize the existing knowledge on the topic into a precise theoretical framework; the second one is to build a framework of analysis that might address the complexity and heterogeneity of contemporary fashion centres; the third one is to understand how 'real' fashion cities might be analysed according to the analytical framework discussed above. While the first two objectives are addressed in Chapter 1 and Chapter 2, which propose a theoretical and analytical framework for the fashion city idea, the third objective is pursued both in Chapter 3 and Chapter 4, which present two different methodologies for analysing a 'real' fashion city in light of the above analytical structure. The next section clarifies how these objectives are addressed in the present research by introducing the content of each chapter.

Chapter 1 provides a state of the art of the fashion city idea in an attempt to clarify its meaning and significance in the contemporary scenario. In order to simplify the variety of concepts originating from different academic disciplines, fashion's relation with cities is analysed through a specific 'creative approach', with a particular focus on the designer fashion industry as a CCI and fashion designers as an example of the wider 'creative class'. The fashion city is presented as a specific model of the 'creative city' paradigm. The chapter draws upon a broad review and systemization of academic literature on creative cities, cultural economy, CCIs, and fashion design's relation with the urban as primarily emerges from regional and urban studies. Firstly, the chapter addresses the increasing importance of symbolism, creativity, and culture in the post-industrial economy, focusing on the creative city idea and the vast array of definition and criticisms on this theme. Secondly, the analysis explains how the designer fashion industry has become a key component of the CCIs and of the cultural economy, with a focus on the recent transformation of the textile and apparel industry through a Global Value Chain (GVC) approach. Thirdly, causes, factors, and conditions that have affected the concentration of the designer fashion industry and fashion designers in cities are explored. From the analysis of fashion design clusters and their interconnection with CCIs, as well as of locational behaviour of fashion designers in cities, there emerges a theoretical framework that directs attention to a specific model of fashion city focused predominately on the designer fashion industry.

Chapter 2 moves towards an analytical framework for thinking about the diverse nature of fashion's relation with cities and the current heterogeneity of contemporary fashion centres. It argues that there is not a singular category of the fashion city and that treating this concept as a particular example of the creative city paradigm, which focuses solely on fashion design, underplays its wider diversity and complexity. The fashion industry, which includes other activities like fashion manufacturing, retailing, education, event organization, and journalism, plays also a significant role in urban economies associated with fashion. Thus, drawing upon an extensive analysis of studies on traditional and new alternative centres of fashion, the analytical framework looks firstly at models of fashion's world cities, and secondly at contrasting patterns for the development and promotion of so-called 'second-tier' cities of fashion. Opportunities for urban fashion formations associated with the geographies of manufacturing to develop into new fashion cities are also discussed. Thirdly, Weber's ideal type approach is used as methodological tool to replace a search for the characteristics of the fashion city with analytical models of fashion centres.

Weberian ideal types are described as mental constructs formed by 'one-side accentuation' of key elements into a 'unified analytical construct' (Weber, 1904 [1949], p. 90). Drawing upon the above discussion of both complexities of fashion's world cities and the diversity of experience of other fashion centres, it is possible to identify some key 'dimensions' of fashion city formations, which comprise 'economic structure', 'human capital', 'education system', 'institutional infrastructure', retail environment', and 'promotional media system'. Working with these and giving 'one-side accentuation' moves the analysis towards three ideal types of fashion centres. None of these ideal types correspond fully to any historic or existing fashion centre, but all examples discussed earlier have some elements of each model. However, they function as important heuristic devices to address the diversity of fashion cities and to speculate about future pathways. Such an analytical structure raises the fundamental question of what methodologies can be used to position 'real' fashion cities in the 'ideal-types' framework and to examine in depth the nature and main features of these centres. In particular, the complexity and diversity of urban fashion formations, which combine mixings of manufacturing, design, and symbolic elements, is fully reflected in the large variety of methodologies that can be used to analyse contemporary fashion centres.

Chapter 3 and Chapter 4 are intended as two different exploratory exercises to position a fashion centre in the analytical structure discussed above. The common objective is to explore how a 'real' fashion city may be positioned in the 'ideal-types' framework, and to suggest

two complementary methodologies to analyse contemporary fashion centres. It is important to clarify that the aim of this empirical part is not to validate the analytical framework presented in the first part of the dissertation, but rather to identify, propose and test a combined and comprehensive methodology that might analyse the complexity and heterogeneity of contemporary fashion centres. Due to time constraints, this research work has given priority to the definition of a specific analysis technique suited to such a multifaceted and varied subject of study. As a result, the empirical part presented in this work draws upon the study of a single fashion centre. Future research is required to replicate the empirical analysis in other typologies of fashion centres to provide a robust test of validity for the analytical framework of the ideal types.

These chapters present two different analyses of the same fashion city, which are carried out both from a 'supply'- and 'demand-side' perspective. To this day, most studies carried out on fashion centres have drawn upon methodologies that have analysed the main 'tangible' elements forming specific urban fashion formations, such as manufacturing bases, design industries or the education sector. However, as discussed in the theoretical framework, nowadays, the concept of the fashion city lies not only in tangible elements, but also in people's perception of cities as centres of fashion. Place-based symbols, images, and narratives originating from city's characteristic elements are spread throughout media and generate individual structures of mental and social representations, which in turn act as powerful image-creators of fashion centres (Jansson and Power, 2010, Skivko, 2016). Thus, to carry out a comprehensive study, the ideal types dimensions of the same fashion city are explored through two different methodologies that examine both the 'material' elements that form the fashion centre and its 'symbolic' representation.

The two chapters focus on London as unit of analysis. This city is regarded as a distinctive example of major fashion centre in the world, which has undergone a unique and complex development and transformation, and is extremely diversified in its economic, cultural, and social elements. It is particularly endowed with a rich cultural and creative sector that generates both strong economic and symbolic value. Because of the different mixings of elements that characterize this fashion centre, London is regarded as a suitable unit of analysis for carrying out a comprehensive study of a fashion city, which analyses together all the components that lie behind its development, transformation, current nature, and perception. Moreover, to this day, existing studies have primarily addressed single aspects of this fashion centre, and little research has focused on the relationship between fashion and London as a

whole. The chapters draw two different pictures of this fashion city, which are based on an analysis of the dimensions of 'economic structure', 'human capital', 'education system', 'institutional infrastructure', retail environment' and 'promotional media system' both from a 'supply'- and 'demand-side' perspective. Results shed light on the ideal type towards which London tends, and enable comparisons between the 'material' structure of a fashion centre and its 'symbolic' perceived image.

Chapter 3 presents a descriptive study of London from a 'supply-side' perspective, which carries out a qualitative and quantitative analysis of the dimensions, based on the execution of 23 semi-structured interviews with key actors from the local fashion ecosystem, as well as on significant statistics and policy documents from local governments, specialist institutions, and research centres. Interviews were conducted with major representatives of the dimensions under investigation. These included heads of leading fashion design schools, independent fashion designers, and representatives of the fashion manufacturing base, retail and media industry, support institutions and local museums, in addition to scholars engaged in studies concerning London and fashion. The interview process was further supported by a quantitative analysis on the fashion industry, particularly focused on fashion manufacturing, fashion design, fashion education, and fashion retail through the collection of published and unpublished statistics from the Office of National Statistics (ONS), Greater London Authority (GLA), British Fashion Council (BFC), UK Fashion and Textile Association (UKFT) and Higher Education Statistics Agency (HESA). This study highlights the main dimensions that underlie the 'material' development, transformation, and current nature of London as a fashion centre.

Chapter 4 presents an analysis of London from a 'demand-side' perspective, which explores the dominant discourse of this fashion centre on the social media platform Twitter. As compared to other social media platforms like Facebook or Instagram, Twitter is primarily used to express opinion, thoughts, and feelings about a variety of topics, and this enables a better reconstruction of the discourse of London as a fashion city. Moreover, it can be regarded as an important platform where symbols, images, and narratives about places are continuously created and disseminated through people's messages (i.e., tweets) (Sevin, 2013). This leads to the creation of mental place-based associations and to the strengthening of the status of the fashion city. To execute the analysis, a sample of 30,362 tweets including both the words 'London' and 'fashion' was collected over a period of three weeks in June 2017. Tweets were then cleaned and analysed through different selected techniques concerning

statistical associations among words: 'Multidimensional Scaling Analysis', 'Semantic Network Analysis', 'Thematic Analysis of Elementary Contexts', and 'Word Associations Analysis'. Each of these analyses differently contributes to exploring meanings embedded in textual data and to shedding light on the most important thematic areas addressed in the discussion on London and fashion. The combination of the results arising from these different techniques helps highlight the narrative about London and fashion that lies in people's minds. The chapter can also be interpreted as an attempt to measure forms of symbolism that are connected to fashion in contemporary urban environments. In this regard, the final section of the chapter proposes a first explorative study that draws upon Twitter data to compare fashion's world cities. To carry out this analysis, data were collected over a one-month period in February and March 2018. The 'Multidimensional Scaling Analysis' was used to extrapolate the main concepts embedded in tweets about New York, London, Milan, and Paris and their relationship with fashion. The main objective of this additional work is to assess the validity of the Twitter methodology as a means of analysing the symbolic representation of contemporary fashion centres and to provide a first comparative analysis between different typologies of fashion cities.

The present dissertation contributes to broadening the understanding of the meaning and significance of the concept of the fashion city in the contemporary scenario, with implications both for the academic and local-policy field. Firstly, it provides a theoretical tool for organizing the extensive body of cross-disciplinary academic literature on the topic, drawing upon a specific 'creative approach'. Secondly, it proposes a first analytical tool for addressing the current heterogeneity of fashion centres, either identifying 'ideal-types' of fashion cities or suggesting alternative methodologies to analyse these. In particular, it investigates the significance of different kinds of position that fashion plays in urban economies, which now extend beyond traditional manufacturing systems and the more recent paradigm of the creative fashion design industry. The research stimulates critical reflection on the evolving fashion's relations with cities, with a particular emphasis on the actual significance of forms of urban symbolism in the revamping and development of fashion centres. Moreover, the ideal type approach complements and extends the now very familiar division between 'fashion's world cities' and 'second-tier cities' and shifts away from the simplistic 'tool-kit' approaches that have sought to promote fashion centres based on 'models' set by traditional fashion's world cities.

Chapter 1

Analysing the fashion city through a 'creative' approach: A theoretical framework

ABSTRACT

The idea of the 'fashion city' has recently emerged as a new paradigm for local economic development and as a strategic factor for regenerating major and minor cities in the world. Local governments have devoted rising attention to this phenomenon and have sought to make cities identifiable as new centres of fashion culture. In particular, the 'designer fashion industry', which has been acknowledged as a key component of the Cultural and Creative Industries (CCIs) and of the cultural economy, has been targeted by a growing number of urban development policies aimed at making cities identifiable as 'creative'. However, despite the increased attention to the topic, to this day, very limited research has sought to define this phenomenon and to build a precise theory. The aim of the chapter is to provide a theoretical framework for the fashion city concept in an attempt to further the understanding of its meaning and significance in the contemporary scenario. The fashion city idea is analysed through a 'creative approach', with a focus on the designer fashion industry and the creative class of fashion designers. Causes, factors and conditions that have affected the concentration of the designer fashion industry and of the creative class of fashion designers in cities are explored in an attempt to provide a theoretical framework and definition of the concept. As a result of the analysis, the 'creative fashion city', thought of as a specific model of the creative city, is defined as a local creative ecosystem centred on cultural and creative industries, a designer fashion industry, and a creative class of fashion designers.

Keywords: creative city, designer fashion industry, CCIs, fashion designers, creative fashion city.

1.1. Introduction

In the post-industrial economy, particularly as a result of the decline of traditional manufacturing-based industries, creativity has gradually replaced natural resources, location, and market access in determining the growth, competitiveness, and dynamism of urban areas. Most importantly, forms of immaterial and symbolic production, which have been described as goods and services with strong emotional content capable of communicating important cultural meanings, have become increasingly crucial in an economy based on what has been termed as the 'cognitive-cultural capitalism' (Scott, 2014). Nowadays, creativity, culture, and economy are growingly intertwined and have given rise to concepts such as those of the 'creative economy' and 'cultural economy' (Scott, 2000; UNCTAD, 2008). Cities have received a great deal of attention as focal centres for cultural production and as 'loci' capable of generating culture, knowledge and innovation, as well as of stimulating economic growth (Scott, 1997).

In this context, the 'creative city' has become a widespread paradigm for local economic development and has been the subject of a wide and heated debate among international political agenda and cross-disciplinary academic research. In particular, the main conceptual areas of this idea have focused on the significance of creativity and culture, particularly in terms of presence of cultural and creative industries and highly creative people in cities, as factors able to foster urban growth and vitality (Landry, 2000; DCMS, 2001; Florida, 2002). The notion of creativity in the field of urban and regional policy is still flawed, extremely vague, and poorly defined. However, in the last decades, an increasing number of local governments from all over the world have sought to encourage highly creative environments and to make cities identifiable as 'creative' in order to attract human capital, firms, investments and tourism (Vicari, 2010).

Fashion is highly dependent on creativity, both in terms of products and processes, and notably as a direct expression of the work of creative fashion designers. Recent trends of globalization have thoroughly affected the fashion industry, which has gradually evolved from a manufacturing-based into a creativity- and design-oriented industry that generates high levels of symbolism. This has led to define the 'designer fashion industry' as a key component of the Cultural and Creative Industries (CCIs) and of the cultural economy (Scott, 2000; DCMS, 2001; European Commission, 2010; Hu and Chen, 2014; Lazzeretti et al., 2017). Due to its economic and cultural significance, a growing number of urban

11

development policies aimed at regenerating economies through CCIs and at promoting the paradigm of the creative city have included the development of a flourishing designer fashion industry in their local strategies (Crewe and Goodrum, 2000; Melchior, 2011; Rantisi, 2011). Fashion design has become an important identity-creator for building the cultural capital of cities and for making urban centres identifiable as 'creative places'. At the same time, the idea of the 'fashion city' has emerged as a new paradigm for local economic development and as a strategic factor for regenerating major and minor cities in the world. Local governments and 'urban-booster' commentaries have devoted rising attention to this phenomenon and have increasingly sought to promote cities as new centres of fashion culture (Breward and Gilbert, 2006).

This idea has generated a great deal of interest among international scholars. There exists a vast array of studies from cross-disciplinary academic fields (e.g., Urban Planning, Urban Sociology, Economic Geography, Regional Studies, Place Branding, Economic History) that have addressed different aspects of the symbiotic relationship between fashion and cities. A number of studies have analysed the historical formation, economic structure, and more recent evolution of traditional fashion centres like New York, Milan, Paris, and London (Evans and Smith, 2006; Merlo and Polese, 2006; Rocamora, 2009). Another stream of research has focused on the significance of fashion design as a tool capable of revamping cities, as well as on the analysis of more recent and alternative centres of fashion culture (Williams and Currid-Halkett, 2011; Vanichbuncha, 2012; Leslie et al., 2014; Boontharm, 2015). Further research has addressed more closely the relationship between fashion, cities and economy, particularly through the analysis of elements, factors and conditions that are integral part of traditional and newer fashion centres (Leslie and Brail, 2011; Wenting et al., 2011; Pratt et al., 2012; Hu and Chen, 2014).

However, despite the increased attention to the topic and the vast array of studies dedicated to this phenomenon, to this day, it is not easy to identify a well-defined theoretical framework to understand the fashion city idea. Over time, scholars from different disciplinary fields have used various and indefinite approaches to explore the relationship between fashion and the urban. The 'fashion city' idea as a whole has been marginal in existing studies, and the topic has not yet been addressed from a clear and unique perspective. It does not exist a structured definition of the topic and very limited research has sought to build a precise theory. Thus, from the review of the existing literature the key questions arise of what the term 'fashion city' means and whether it may be framed within existing theories.

The aim of the chapter is to provide a theoretical framework for the fashion city concept in an attempt to further the understanding of it meaning and significance in the contemporary scenario. In particular, the fashion city idea is analysed through a 'creative approach', with a particular focus on the designer fashion industry as a particular CCI and fashion designers as an example of the wider 'creative class'. It relies upon an extensive review and systematization of exiting literature on the topic from different academic disciplines. Firstly, the analysis addresses how the designer fashion industry has become a key component of the paradigm of the CCIs and of the cultural economy, contributing to the rise of the idea of the fashion city. Secondly, drawing upon the creative city theory, attention is given to the analysis of the relationship between fashion and the city. Causes, factors and conditions that have affected the concentration of the designer fashion industry and of the creative class of fashion designers in cities are broadly explored in an attempt to provide a theoretical framework and a definition of the concept. As a result of the analysis, the fashion city is defined through a 'creative approach', which addresses the idea of the fashion city as a specific model of the creative city paradigm termed the 'creative fashion city'.

The chapter is structured as follows. The first section addresses the creative city concept. It analyses the vast array of definitions, criticisms, and practical applications that have been adopted over time in order to clarify the meaning of this paradigm in the contemporary scenario. The second and third sections analyse the main transformations of the textile and apparel industry in terms of nature, characteristics and geography, by adopting a 'global value chain' (GVC) approach. The fourth section is dedicated to the recent inclusion of the designer fashion industry in the CCIs and cultural economy paradigms. The fifth section introduces the concept of the fashion city as a new model for local economic development and sheds light on the limited existing research on the topic. The subsequent three sections attempt to draw a picture of the relationship between fashion and the urban by exploring the causes, factors and conditions that have affected the concentration of designer fashion industries and of fashion designers in cities. The last section proposes a theoretical framework and definition of the fashion city drawing upon a 'creative approach'. Conclusions summarise the main results and discuss the limitations of the proposed framework.

1.2. Cities, creativity and economic development: The 'creative city'

Over time, trends of globalization, such as the international fragmentation of production or the rising significance of intangible business activities, have led cities to play an increasingly

important role and to become an essential resource in economic development processes (Florida, 2002; Martinotti et al., 2009; Vicari, 2010). Cities have long been seen as central places of intense cultural and economic activity, capable of stimulating economic growth and of generating high levels of creativity, culture, knowledge, and innovation, which have been regarded as key elements in the post-industrial economy (Scott, 1997; Florida, 2003). In particular, these factors have benefited from the physical proximity and the diversity the urban environment can offer. In fact, nowadays, the proximity to a large variety of forms of knowledge, information, and ideas, in addition to an international, high-skilled, and heterogeneous labour force, has become fundamental to economic development, growth, and regeneration processes. These elements, together with a dense concentration of specialised advance services, institutions, associations, universities and research centres are usually located and easily accessible in urban areas (Costa, 2008; Martinotti et al., 2009). In addition, a huge variety and diversity[1] of cultures, people, economic and social activities, which is usually found in cities, encourages the continuous exchange and dissemination of ideas, innovation and creativity, as well as stimulating economic development (Rantisi, 2004a; Lazzeretti, 2009).

Over time, cities have been subject to a significant change in their economic nature. In this respect, Scott (2014) discusses the emergence of a third wave of urbanization based on the 'cognitive-cultural capitalism', which has replaced the factory and workshop system of the nineteenth century, and the Fordist mass production of goods and services of the twentieth century. In this context, the 'post-Fordist city' has become a vital source of economic advantage and a major centre for image-making business activities, which are engaged in the commercialization of goods and services that communicate cultural and social meanings (Scott, 1996; Jansson and Power, 2010). Cities have evolved from manufacturing centres of durable goods into centres of production of advance services (e.g., finance, insurance, banking, management consulting), as well as into significant places for the exchange of knowledge, ideas, and information (Pratt, 2009). More specifically, nations and cities have shifted from a manufacturing economy to an informational economy, and then from an informational economy to a cultural economy (Hall, 2000).

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[1] The concept of diversity has been defined in terms of heterogeneity of various forms, such as people, talent, industry, and firms. More specifically, the stream of research of cultural economy emphasizes the fundamental role of diversity in terms of people and talent, whereas urban economists and geographers in terms of sectors and firms (Lazzeretti, 2009).

'Sectors like technology-intensive production, financial and business operations, fashion-oriented manufacturing, cultural industries, personal services and so on…play an important role in the great urban resurgence that has occurred over the last two decades all across the globe' (Scott, 2008, p. vii). Declining industrial warehouses have been transformed into art centres, shopping facilities, music venues, as well as design, media, fashion firms and so forth (Scott, 2014). Most importantly, forms of immaterial and symbolic production, which are described as goods and services with strong emotional and intellectual content, have become highly crucial and extremely strategic in the new local economic development paradigm (Scott, 2001). In this context, the developing of cultural capital, which is defined as a set of cultural meanings, symbols, and aesthetics, has become a key activity for positioning cities in the global value chain and for fostering the growth of creative industries in the globalised economy (Jansson and Power, 2010; Pasquinelli, 2013).

In this context, creativity has become an important urban phenomenon and a powerful engine for the development and renaissance of cities (Lazzeretti et al., 2008). Creativity is a highly difficult word whose meaning varies according to the opinion of different people. Moreover, the notion of creativity in urban and regional policy is still extremely vague, flawed, and unclear. The definition of creativity as a social phenomenon characterised by an intense network of social relationships that affect its substance and form allows understanding why geography and, more specifically, places matter. Cities function as a means of determining variation in creative energies, where the 'creative field of the city' can be defined as 'a system of cues and resources providing materials for imaginative appropriation by individuals and groups as they pursue the business of work and life in urban space' (Scott, 2010, p. 121).

With the decline of traditional manufacturing-based industries, creativity has gradually replaced natural resources, location, and market access in determining the growth, competitiveness, and dynamism of urban areas. Starting from the mid-1990s, this element has drawn the increased attention of a large number of scholars from cross-disciplinary fields such as economic geography, cultural economics, urban planning, and sociology. Several studies have defined creativity as the new pillar of the whole economic system, an essential source of competitive advantage in the contemporary economy, and a fundamental goal for local development policies (Florida, 2002; Power and Scott, 2004; Landry, 2006; Lazzeretti et al, 2008). Creativity, culture, and economy are growingly intertwined and have given rise to concepts such as those of the 'creative economy' and 'cultural economy' (UNCTAD, 2008). By the same token, cities have received a great deal of attention as focal centres for cultural

production and as significant workshops of creativity, culture, and innovation.

As a result, the notion of the 'creative city' has been regarded as a powerful paradigm for local economic development and has been subject to a wide and fierce discussion in the academic world. It has generated high interest and lively debates across political agenda in several countries and contemporary academic research from various disciplinary fields such as economic geography, urban planning, urban geography, cultural studies, architecture and sociology (Costa, 2008; UNCTAD, 2008; Vicari, 2010). Thus, it becomes important to understand why such a concept has become so broadly widespread in the world, and how it is possible to define its meaning, nature, and content. In the past, creative cities were defined ex-post, drawing upon not only historical, cultural, and artistic traditions, but also social and economic factors, together with a universally acknowledged level of creativity, as in the case of the 'Renaissance Florence' or 'Victorian London'. In more recent years, the analysis of creative cities has relied upon a series of elements, which have been defined as essential to broader conditions of creativity. In fact, not only excellent outputs but also activities and investments ex-ante, including the presence of research centres, innovative fabrics and cutting-edge Information and Communication Technologies (ICTs) may lead to the acknowledgment of urban creative potential (Martinotti et al., 2009). Moreover, more recently, cultural economics and the economics of creativity have extended the concept of the creative city not only to metropolitan areas, but also to urban peripheries and smaller cities (Lazzeretti, 2012). The next sub-paragraph is dedicated to exploring the main theoretical ideas that underpin the creative city concept, in an attempt to provide a clearer analysis and explanation of this idea.

1.2.1. Conceptualizing the creative city: Creativity, culture and the creative class

The concept of the creative city began to emerge in the late 1980s[2], but the notion was formally introduced in the early 1990s. The original idea was that 'there is always more potential in any place than any of us would think at first sight, even though very few cities, perhaps London, New York or Amsterdam are comprehensively creative' (Landry, 2006, p. 2; UNCTAD, 2008). Thus, according to this perspective, every city can become more creative than it currently is. The creative city includes not only artists and people defined as creative,

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[2] Throughout the history, psychologists have long been interested in individual creativity. However, it was Jane Jacobs (1984) who firstly referred to the concept of the creative city as part of a discussion on small-sized craft industries (Scott, 2014).

but also all individuals who address issues in an original way (e.g., scientist, business people). Moreover, it requires a culture of creativity that needs to be strongly embedded in the urban environment through hard and soft infrastructures, as well as through the generation of a creative milieu able to stimulate ideas and inventions (Landry, 2006).

In the last decades, a large number of scholars have addressed the meaning, significance, and nature of the creative city, giving rise to a huge variety of definitions. Over time, academics have adopted different approaches to define the creative city and, as a consequence, policy makers have relied upon various concepts and objectives. To this day, it is not easy to identify a common conceptual ground, which merges all the methods, practical applications, and meanings developed for this concept. However, what clearly emerges is a common and widespread ambition of an increasing number of local governments from all over the world to make their cities as 'creative' as possible. In order to summarize these diverse interpretations and provide a clear framework of the topic, it is possible to identify three broad conceptual areas related to the definition of the creative city (Costa, 2008; UNCTAD, 2008). The first one focuses on the creative economy and on the use of cultural and creative industries as drivers of urban growth and development. The second one is primarily centred on the idea of creativity as a device for urban development. Lastly, the third one is associated with the idea of attracting, nurturing and retaining talented and creative people to cities in order to spur innovation, creativity and growth (Table 1.1). It is important to highlight that this distinction is only a theoretical construction for specific expositive purposes and the same theory can belong to more than one conceptual area (Costa, 2008).

A first set of academic research (Hall, 2000; DCMS, 2001; Pratt, 2008b) places the creative city concept in the creative economy and cultural and creative industries research area, where creativity underpins the generation of cultural products, service, and related activities as fundamental means of developing economies. In this context, CCIs, which have an intense symbolic and aesthetic nature, have been included as core activities of the aforementioned 'cognitive-cultural capitalism', functioning as engines for urban regeneration and catalysers for innovation, job creation and growth in contemporary cities (DCMS, 2001; Scott, 2008; Pratt, 2009). Over time, these industries have been posited at the centre of a fervent international debate among politicians, media, and scholars from different research fields (Hall, 2000; Scott, 2000; Power and Scott, 2004; Lazzeretti et al., 2008). More specifically, on the one hand, 'cultural industries', which are growingly widespread in the world, have been regarded as forms of cultural production and consumption endowed with strong

symbolic content (Pratt, 2008b; UNCTAD 2008). In the 1980s and 1990s, several industrial cities such as Liverpool, Sheffield, Manchester, and Birmingham began to develop cultural industries strategies as a device for urban economic growth and revitalisation (Landry, 2006). On the other hand, the Department of Media, Culture and Sports (DCMS) in the UK defined the 'creative industries' as 'those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property' (DCMS, 2001, p. 5). More recently, other contributions have relied upon broader approaches of classification or have expanded the creative sector to a broader range of activities like tourism, events, and the experience economy (European Commission, 2010; Lazzeretti, 2012).

The creative city has also been defined as a place strongly associated with the production of culture, which primarily focuses on the generation of new culturally significant ideas in a dynamic ecosystem of creative industries, activities and people (Pratt, 2008a). The majority of scholars addressing the topic of the creative city agree about the significance of culture, in all its forms, as a central element of the creative city. In particular, in recent years, there has been a shift of focus from the mere preservation of culture to its capability of fostering innovation, growth, and economic development in the wider economy. In this respect, a growing number of academic and policy communities have acknowledged the high economic value of this resource, which is endowed with both material and immaterial assets (Scott, 1997; 2000; Pratt, 2008b; Lazzeretti, 2009; 2013). For example, the concept of the CCC (Creative Capacity of Culture) suggests the idea of culture as a significant source for innovation, creativity, renewal, and economic development through the creation of new ideas, cross-fertilization, and serendipity (Lazzeretti, 2009).

Culture has been regarded as an important means of revamping declining industrial areas and of transforming traditional manufacturing centres into renowned tourist destinations (Scott, 2004; Pratt, 2009). In this regard, culture has been defined as 'the magic substitute for all the lost factories and warehouses, and as a device that will create a new urban image, making the city more attractive to mobile capital and mobile professional workers' (Hall, 2000, p. 640). As a consequence, urban governments have growingly integrated culture within their economic strategies aimed at promoting cities as centres of creativity in order to generate economic value. The promotion of a cultural milieu and of cultural activities has been included within policy actions aimed at encouraging regional and urban development, fostering the competitive advantage of cities and enhancing the prestige and image of urban

areas (Costa, 2008). In this sense, a cultural milieu, which is endowed with amenities positively evaluated by creative individuals, may generate new ideas and attract tourism, creative talent, and new businesses (Hall, 2000; Evans, 2003; Costa, 2008; Lazzeretti, 2009; 2013; Scott, 2010).

From the perspective of urban planning, the second group of academic contributions derives from the Charles Landry's (2000) work 'The Creative City: A Toolkit for Urban Innovators'. He defines creativity as 'a new method of strategic urban planning' (Landry, 2000, p. xii), considering this factor as a crucial and strategic resource that should underpin every aspect in urban life. Landry (2000) addresses the idea of the 'creative city' through the concept of the 'creative milieu', which he defines as 'a physical setting where a critical mass of creative people, entrepreneurs, intellectuals, social activists, artists, administrators, power brokers or students can operate in an open-minded and cosmopolitan context and where face-to-face interactions create new ideas, artefacts, products, services and institutions. That, as a consequence, contributes to economic success' (Landry, 2000, p. 133). Here, creativity is regarded as a fundamental means of urban development and of innovating cities, where the 'creative milieu' powerfully contributes to economic success. A 'creative' response is needed to solve contemporary urban problems such as the decline of traditional industries or challenges arising from globalization. Moreover, the author proposes several indicators to assess the vitality of the creative city: critical mass, diversity, accessibility, safety and security, identity and distinctiveness, innovativeness, linkage and synergy, competitiveness, and organizational capacity. This strand of research has generated huge interest among urban planners, city officials, and policy makers, which have growingly sought to promote creative energies and intense cultural life in contemporary cities (Scott, 2014).

A third academic approach focuses on the significant contribution of the Richard Florida's work (2002) 'The Rise of the Creative Class', which has signed a major turning point in the lively debate on the creative city. The creativity city, which was originally associated with CCIs, is now defined as a place where talented and creative people concentrate. According to Florida (2002), the capability of attracting, nurturing, and retaining creative individuals in cities contributes to urban vitality, competitiveness, and growth. In particular, he defines the 'creative class' as talented people involved in non-standardised and knowledge-intensive business activities (e.g., artists, architects, designers, poets, scientists, analysts, university professors, business managers, opinion makers), who tend to concentrate in creative cities, attracting firms and investors, as well as generating economic value through their creativity.

'The distinguishing characteristic of the creative class is that its members engage in work whose function is to create meaningful forms' (Florida, 2003, p. 8). This theory has contributed to shifting the focus from cultural and creative industries to human capital and its creative habitat, which have been regarded as fundamental means of spurring economic growth and of revitalising contemporary urban centres (Florida, 2002; Lazzeretti et al., 2008). Such a thesis has generated new challenges for policy makers, economic developers and academic researchers, who have investigated which factors may contribute to the attraction and retention of creative people in certain cities. More specifically, several attempts have been made to answer the question of what makes cities 'creative'.

In this regard, a first strand of research advocates for openness to creativity, diversity, and tolerance as the main factors that function as drivers for attracting the creative class to cities. In this regard, Florida (2003) contends that the creative class has the tendency to concentrate in places with the simultaneous presence of the 3Ts: Tolerance (e.g., openness and diversity to different ethnicities), Talent (e.g., people with a bachelor's degree and above), and Technology (e.g., function of innovation and high-technology concentrations in cities). According to this idea, the 3Ts together contribute to promoting labour and occupations, as well as innovation and economic growth. More generally, quality of place, quality of life and high-order amenities have been posited as main elements of attraction of creativity, cultural industries and, in turn, of a mobile creative class. These elements include a tolerant social atmosphere, open to newcomers and ethnic diversity, as well as cultural activities, public spaces, entertainment facilities, lifestyle issues and infrastructures (e.g., parks, museums, art galleries, nightlife, mega-events), which are typically located in large cities. Of particular importance is the presence of urban cultural diversity, which is measured in terms of the proportion of bohemians, a sizeable gay community, a foreign-born population and a tolerant milieu, which contributes to facilitating the diffusion and acceptance of new ideas and to fostering creative climates (Florida, 2002; Leslie and Brail, 2011).

On the other hand, Storper and Manville (2006) focus on employment opportunities and access to jobs associated with specific clusters, endowed with a massive number of highly skilled workers, as the main elements that encourage creative people to concentrate in particular cities. 'People generally locate where they can maximise their access to jobs' (Storper and Manville, 2006, p. 1254). This, in turn, leads to the presence of amenities, tolerance and diversity that are capable of retaining a creative class in urban centres. In a similar vein, Storper and Scott (2009) contend that creative individuals choose where to locate

according to job-generating capacities and to a structured association between their 'talents, forms of economic specialization and labour demand'.

Moreover, according to the idea of the 'artistic gravitation', successful agglomerations of cultural and creative industries are able to generate powerful gravitational forces, which draw talented individuals to cities (Power and Scott, 2004). In this regard, Wenting (2008) states that the performance of designer fashion firms clustered in particular cities may contribute to the attraction of new creative talented individuals. In addition, Molotch (2002) suggests that issues linked to religion, ethnicity, sexuality, or other forms of identity can be posited as means of drawing the attention of creative talent. Furthermore, according to Markusen and Schrock (2006), artists (i.e., performing artists, musicians, writers, visual artists) tend to concentrate in traditional large and mature cities due to their size, higher interest in art consumption and a larger source of demand and income, as well as synergies among different typologies of creative activities. Moreover, a large number of cultural institutions, together with diversity and innovativeness, contribute to the concentration of artists in large cities. However, higher costs of living, the presence of less congested private spaces for doing arts together with the rise of the Internet, which allows artists to sell artworks from remote locations, may also drive artists in second-tier and smaller cities.

Table 1.1. Conceptual frameworks for the definition of the creative city

Area of research	Definition and main aspects	Policy interventions
Cultural and creative industries and activities (Hall, 2000; DCMS, 2001; Pratt, 2008b)	*The creative city is defined as a place associated with the production of culture within a dynamic ecosystem of creative industries, activities, and people.* • CCIs and culture function as catalysers for job creation, innovation, and creativity in contemporary cities.	• Urban governments have integrated the cultural and creative sector in economic strategies aimed at promoting cities as centres of creativity; • Policy actions have focused on the promotion of cultural activities and milieus to attract tourism, talent, and new businesses.
Urban planning (Landry, 2000)	*The creative city as a place associated with the 'creative milieu', which is regarded as a physical setting where people can operate in an open-minded and cosmopolitan context and where face-to-face interactions create new ideas, products, services and institutions.* • Creativity as a toolkit of urban development; • Generating a creative milieu is key to economic success and is a means of strategic urban planning and innovating cities.	• Urban planners, city officials, and policy makers have sought to promote creative energies and intense cultural life; • A 'creative' response is needed to solve and find new solutions to quotidian urban problems.
Creative class (Florida, 2002)	*The creative city is defined as a place where creative and talented people concentrate, attracting firms and investors, as well as generating economic value through creativity.* • Human capital as a means of spurring economic growth and revitalising cities; • The creative class includes talented people involved in non-standardised and knowledge-intensive business activities.	• Policy makers and economic developers have focused on the attraction and retention of creative people for urban vitality, competitiveness, and growth; • Cultural diversity, tolerance, quality of place, high-order amenities and successful CCIs' agglomerations as well as job-generating capacities regarded as the main factors for drawing the creative class to cities.

Sources: Author's elaboration using the theoretical framework of Costa (2008).

1.2.2. Questioning the creative city: Doubts, limits, and criticisms

Over time, the idea of the creative city as a whole has been the subject of fervent debates and considerable criticisms. In particular, a vast array of studies has questioned the meaning, significance, and validity of this concept, as well as of its variety of meanings and practical applications. For instance, Pratt (2008b) makes a case against the instrumental policies that use culture and creativity to achieve non-cultural purposes and as a device for differentiating cities. He advocates for the use of non-instrumental policies aimed at developing cultural industries and cultural production rather than of cultural policies focusing on consumption. Moreover, he argues that culture is strongly associated with particular places in specific times, and it is therefore highly difficult to identify a single exemplary model from the various cases and experience. By the same token, Pratt (2008a, p. 37) contends that 'a creative city cannot be founded like some cathedral in the desert; it needs to be linked to, and to be part of, an already existing cultural environment'. Therefore, there is a need for a wider and more critical approach to the creative city, where local policies need to be contextualised in a specific social, cultural and economic environment, taking into account different local cultures and contexts (Pratt and D'Ovidio, 2014). Comunian (2011) criticises existing research that claims that a creative city needs specific local assets (e.g., cultural amenities, diversity) without explaining the interaction among the creative class and these assets, as well as the resulting competitive advantages. She states that a complexity perspective, which takes into account the importance of networks and non-linear interactions, needs to be posited as central element in the understanding of the creative city.

In a similar vein, Scott (2014, p. 565) argues that the majority of existing research on creative cities tends to offer a 'flawed representation of urban dynamics and leads in many instances to essentially regressive policy advocacies'. He states that the concept of cognitive–cultural capitalism is a more robust theoretical framework, through which contemporary urbanisation processes can be described. More recently, D'Ovidio (2016) highlights the dark side of creativity, showing how many aspects of the creative city may affect urban environments with problematic issues and serious drawbacks for societies and culture. In particular, she sheds light on the precarious situation of creative workers, vague creative and cultural policies, marginalisation of avant-garde culture, as well as a current inadequate promotion of culture. Therefore, when dealing with the creative city, she advocates for a higher level of attention to social issues by urban governments and academics.

The majority of studies have challenged the central ideas of Florida's theory (2002), notably in terms of inconsistent data, empirical rigour, and vague policy implications. The fuzziness and redundancy of conception, together with the difficulties of identifying and defining creativity and creative occupations, have been the main points of criticism. Glaeser (2005), for instance, contends that the creative class does not differ much from human capital because creative people are mainly educated and skilled. Moreover, he agrees that both creativity and human capital are extremely significant to urban growth. However, he questions the association between creative people and Bohemianism. Specifically, he contends that 'people who have emphasised the connection between human capital and growth always argued that this effect reflected the importance of idea transmission in urban areas. But there is no evidence to suggest that there is anything to this diversity or Bohemianism, once you control for human capital' (Glaeser, 2005, p. 596). Instead, he argues that the Three S - Skills, Sun, and Sprawl - are the factors that attract creative talent and foster economic development.

Peck (2005, p. 763) states that 'rather than 'civilizing' urban economic development by 'bringing in culture', creativity strategies do the opposite: they commodify the arts and cultural resources, even social tolerance itself, suturing them as putative economic assets to evolving regimes of urban competition'. He addresses the urban policy dimension of urban creativity and affirms that creative strategies 'work quietly with the grain of extant neoliberal development agendas, framed around interurban competition, gentrification, middle-class consumption and place-marketing' (Peck, 2005, p. 740). Markusen (2006), in a study of artists as an example of creative occupations, critiques the creative class concept and its casual logic relationship with urban growth. She argues that the concepts of the 'creative class' and 'creative occupations' are extremely fuzzy. She contends that the creative class of Florida (2002) merges together people from different occupations (e.g., artists with engineers and scientists) and with distinctive spatial tendencies, political views, and amenity preferences. Moreover, the occupational categories, which are purely selected on the basis of educational attainment, exclude some creative occupations and instead include categories that are not intuitively creative (e.g., actuaries, tax collectors).

Again, Storper and Scott (2009) criticize the idea of amenities as fundamental drivers for attracting people and generating urban growth and advocate for the significance of movements of labour. According to them 'recourse to amenities-based theories as a guiding principle for urban growth policy is ill-advised because these theories manifestly fail to address the basic issues of building, sustaining and transforming regional ensembles of

production activities and their attendant local labour markets' (Storper and Scott, 2009, p. 164). In a similar vein, Scott (2006, p. 11) contends that Florida 'fails signally to articulate the necessary and sufficient conditions under which skilled, qualified and creative individuals will actually congregate together in particular places and remain there over any reasonable long-run period time. The key to this conundrum lies in the production system'. According his idea, an efficient and remunerative system of employment is necessary to retain people in cities. Additionally, creative people are not capable of sustaining urban creativity in the long period without mobilising creativity for stimulating learning and innovation.

More recently, Pratt and D'Ovidio (2014) observe how the promotion of the creative class facilitates a process of gentrification, where the middle-class (i.e., the creative class) relocates to areas in the city centre and residents are gradually forced to move out from these gentrified areas. In a similar vein, also Florida (2017) looks at the drawbacks that have partially stemmed from the 'rise of the creative class' in a handful of 'superstar cities' like New York, London, Hong Kong, Los Angeles, and Paris. This has led to a growing economic gap between these cities and other urban centres across the world, as well as to unaffordable housing prices, higher spatial inequality, and economic and racial segregation in these 'superstar cities'. Many other studies have highlighted further limits, weaknesses, as well as unclear and vague definitions, and notions. Those presented above are only few examples of the vast array of criticisms that have been raised on the creative city and, more specifically, on the creative class concept. However, despite these limitations and the current lack of clarity, the words 'creativity', 'creative class', and 'creative city' have become more and more popular among international literature and policy makers and have achieved increasing significance in urban branding policies (Vanolo, 2008).

1.2.3. How to make a city 'creative': Urban branding policies

The idea that human capital is a driving force of the new economy and a fundamental resource in territorial competitiveness has been considered growingly crucial in economic development and regeneration processes at urban policy level (Vicari, 2010). Equally, the rising importance of the relationship between innovation, creativity, culture, and cities in the new economy has strongly contributed to influencing contemporary city strategies. In fact, in addition to being material spaces, cities have become significant elements of symbolic perception and representation. In this context, a rising number of urban policies has sought to foster an 'open' and 'creative' climate, environment, and lifestyle in order to make cities

centres of creativity and, in turn, to attract creative people, professionals and firms with high levels of knowledge and skills (Florida, 2002; Costa, 2008; Vanolo, 2008; Vicari, 2010; Scott, 2014). In this respect Landry (2006, p. 1) states: 'everyone is in the creative game…creativity has become a mantra of our age endowed almost exclusively with positive virtues'. In the last decades, an increasing number of cities, including for instance Manchester, Bristol, Toronto, Vancouver, Osaka and Edinburgh, have aspired to be considered 'creative' as part of their local development policies (Landry, 2006; Scott, 2014).

In particular, these theories have led to a proliferation of urban branding policies, specifically designed to stimulate a cultural and creative environment and to generate attractive creative city images. In the post-industrial economy, urban branding strategies have generated a great deal of interest among policy-makers and scholars from different research fields (e.g., economic geography, regional studies, marketing) as a tool capable of creating and communicating unique and distinctive place images and identities, notably through a symbiotic relationship between the city and local actors, who mutually benefit from their symbolic interaction (Jansson and Power, 2010; Vicari, 2010).

The image of cities is formed by symbols that are embedded in material elements (e.g., buildings), immaterial factors (e.g., habits, routines), and discourses about the city stemming from promotional activities (e.g., tourist guides, marketing campaigns) (Vanolo, 2008). In this context, a variety of media (e.g., newspapers, magazines, televisions, critics, editors) plays a fundamental role in distributing information, generating buzz, and building the symbolic value and image of cultural industries, products and cities (Currid and Williams, 2010). Furthermore, the symbolic image of a city can be divided into an internal image related to the perception of local actors, and a more abstract and vague external image associated with the perception of people extraneous to the local environment. In this context, city branding activities act as a 'story telling' and are aimed at affecting the perception of people about specific places through the creation of positive expectations.

The construction of positive urban images, which are endowed with powerful cultural and creative narratives, has become a major challenge for cities and has been regarded as an essential tool for attracting tourism and inward investment, as well as for promoting economic development and strengthening local identity and identification of citizens with cities (Kavaratzis, 2004; Vanolo, 2008). Some cities are more likely to encourage creativity and the process of cultural production, such as in the case of major cities like New York, London, Berlin, Tokyo, and Paris, which are traditionally characterised by a high demand for cultural

products. In London, for example, policy makers have recently sought to establish a new image of the city based on the high significance of creative industries such as media, design, and fashion (Huang et al., 2016). Overall, an increasing number of local governments and policy makers from all over the world have invested in the generation of unique urban identities, making their cities important hubs of creative and cultural production (Currid-Halkett and Scott, 2013). Helsinki, Copenhagen, Amsterdam, and Bilbao are just a few examples of cities that have posited creativity at the centre of their marketing strategies as a means of revamping urban images and symbols (Vanolo, 2008).

However, recently, as in the case of the creative city concept, some concerns have been raised on the global convergence and homogenization of world urban branding narrations that promote creativity, arts, and culture. In fact, cities from different geographical and cultural contexts have generally drawn upon some successful best practices (e.g., the Bilbao effect for building cultural images) or similar promotional policies to create new city images around creativity. This has gradually increased the risk of making urban branding messages identical and, consequently, highly ineffective (D'Ovidio, 2016). In this context, cities have faced the risk of losing their own identity and authenticity, turning into identical urban centres oriented towards the same cultural and creative elements that are no longer attractive for their development and regeneration.

1.3. The nature of the fashion industry: Between economic production and creativity

Nowadays, the economic structure of the fashion industry has a dual nature, which is based both on the traditional physical manufacturing of garments and on the creation and transmission of symbolic content into contemporary economic landscapes (Kawamura, 2005; Hauge, 2007; Weller, 2007; Hauge et al., 2009; Williams and Currid-Halkett, 2011; Hauge, 2012; Pratt et al., 2012). Whereas 'fashion' refers to 'the symbolic image of the textile industry, clothes making and accessories' (Santagata et al., 2009, p. 114), the concepts of 'fashion' and 'design' are strictly complementary: the former represents the item that embodies high semiotic value together with desirable aesthetics, the latter refers to the process aimed at transforming cultural symbols of objects into final products through the activity of fashion designers (Aage and Belussi, 2008; Bettiol et al., 2009; Leslie and Rantisi, 2009). Thus, the designing process can be regarded as the creative action that defines the symbolic image of items, as well as their identity, distinctiveness and image. This is particularly

important for the couture and ready-to-wear sectors rather than for mass manufacturing. In fact, these modes of production focus more on the quality of processes and products, and designers play a preeminent role in building the perceived value of garments (Aakko, 2018). However, unlike other creative activities like visual arts, music, poetry, and literature, fashion has strong connections with economic production systems and is also oriented towards the generation of economic value (Currid, 2007b).

Fashion is highly dependent on creativity, both in terms of products and processes, and particularly as a direct expression of the work of fashion designers. Over time, the behaviour of fashion producers and consumers has been variously influenced by rhythms of creativity. The traditional model of creativity draws upon the idea of the 'creative genius', where creativity is regarded as an 'epiphany' but also as a problem-solving activity, where a person is defined as creative when is endowed with imagination, intelligence, experience and risk-taking attitude (Santagata, 2004). The symbolic component of garments is fully reflected in the capability of fashion designers of incorporating symbolic knowledge into a commercial product (Wenting, 2008). In fact, they are aimed at creating not only commercial but also social, cultural, and symbolic value (Rantisi, 2006; Malem, 2008; Knox, 2011; Hauge, 2012; D'Ovidio, 2016). In particular, there exists a strong tension between the creative and artistic identities of fashion designers and the need for running a sustainable business, which requires specific managerial, financial and organizational skills that are not usually associated with the nature of creative fashion work (Virani and Banks, 2014). Therefore, in this sense, designers have to find a balance between creativity and commercial aspirations through the combination of innovative creative work and business skills.

In sum, fashion design is positioned both in the creative and economic field. On the one hand, designers produce items with high semiotic value and capable of shaping contemporary aesthetics through the use of creativity and artistic expression. On the other hand, they create goods under conditions of profitability and price criteria, and in the context of market competition (McRobbie, 1998; Scott, 2002; Aspers and Skov, 2006; D'Ovidio, 2010; Pedroni and Volonté, 2014; Huang et al., 2016). In this regard, Braham (1997, p. 121) claims: 'fashion, as well as being a matter of creation, consumption, and identity, is also a matter of production, distribution, and retailing. It is therefore not just a cultural subject, but a subject which has to do with apparently rather mundane matters of profit margins, response times, supply and demand, and so on…This means that the question of whether or not 'fashion' is homogenous…cannot be treated simply as a cultural or aesthetic matter…it also has material

implications for manufacturing, distribution, ordering and selling'.

Before going any further, it is important to clarify and underline the differences between the terms 'fashion industry' and 'designer fashion industry' (Figure 1.1). In fact, the former can be regarded as a 'manufactured cultural symbol' within an institutionalised system, where a number of cultural institutions contribute to the production of economic and cultural value (Kawamura, 2005; Hauge, 2012). In this context, designer fashion, manufacturing, and service-related sectors are fully integrated into a highly specific production system that characterises the broad 'fashion industry' (Hu and Chen, 2014). In a similar vein, Oxford Economics (2010; 2016), in the Value of the UK Fashion Industry report aimed at measuring the economic impact and value of UK fashion, defines the fashion industry as a sector including manufacturing, fashion design, education, media, wholesale, retail, marketing and other related creative industries. In particular, in this work, 'fashion manufacturing' refers to the textiles, apparel, leather, and footwear production. On the other hand, the 'designer fashion industry' represents a narrower sector, which is only related to the creative and design element of the fashion industry. More specifically, according to Mintel (2002), this sector includes the following elements: 1) couture (i.e., the original designer market dominated by French brands like Dior and Chanel); 2) international designers (i.e., a label usually dominated by one name like Donna Karan); 3) diffusion (i.e., designers producing high-streets ranges for specific stores), and 4) high-fashion (i.e., up and coming new designers usually endorsed by celebrities).

Figure 1.1. The structure of the fashion industry
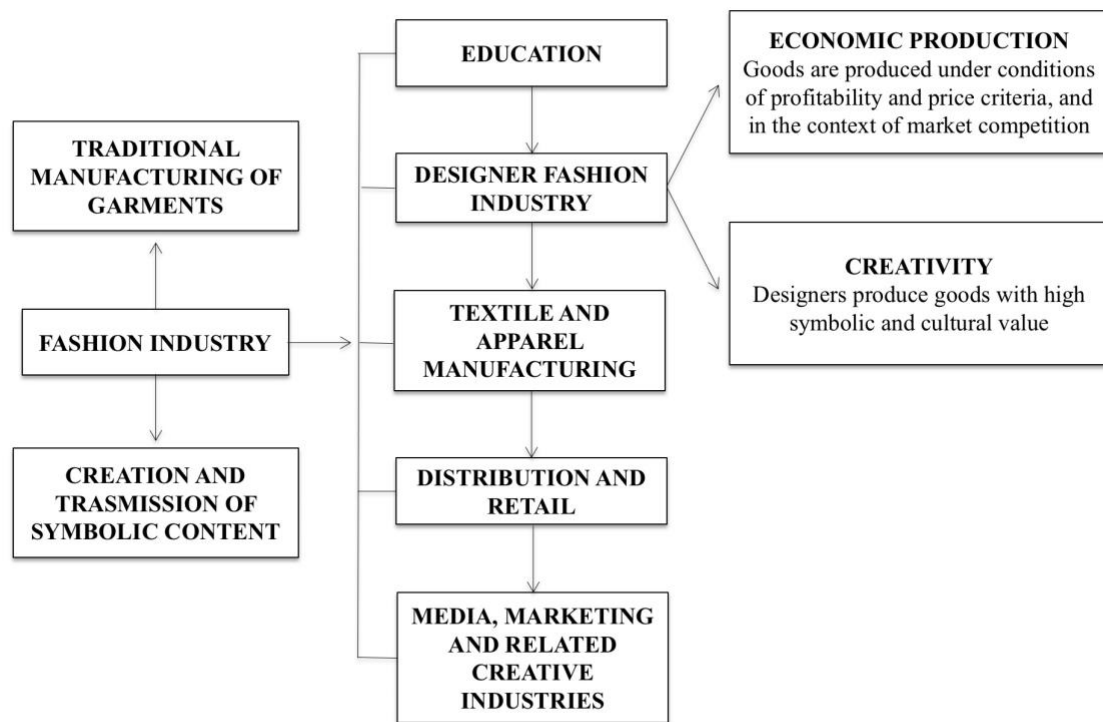
Sources: Author's elaboration.

1.4. How globalization has changed the fashion industry and its geographies

The fashion industry, both in terms of business practices and production systems, has been thoroughly affected by trends of globalization. In particular, the emergence of new markets, tastes and consumers, as well as phenomena of large-scale outsourcing and market saturation, have led to a dramatic collapse and contraction of fashion manufacturing bases in major urban centres (Scott, 2002; Evans and Smith, 2006; Williams and Currid-Halkett, 2011; Leslie et al., 2014). Notably, increasing competitive pressures deriving from low-cost producers in developing countries have contributed to relocating production away from the traditional producing regions mainly localised in Europe and North America, which have growingly relied upon imports. Moreover, the decrease of telecommunication and transportation costs, together with the removal of trade barriers, tariffs and other protective measures, has further intensified this phenomenon. In addition, the emergence of the system of 'fast fashion', which

is based on quick turnaround times, lean manufacturing systems and globalised production chains, has added additional pressures for reducing production costs and the products' 'time to market'. As a consequence, the fashion industry, which has now become one of the most globalised industries in the world, has experienced a significant loss of manufacturing jobs and firms, particularly in global cities like London and New York (Scott, 2002; Segre Reinach, 2005; Evans and Smith, 2006; Hauge, 2007; Skov, 2011; Leslie et al., 2014).

In order to respond to these competitive pressures, this industry has enacted a deep restructuring process and has evolved from a manufacturing-based into a creativity- and design-oriented industry that generates high levels of urban symbolism (Aage and Belussi, 2008). In this sense, McRobbie (1998) refers to a transition of fashion from a 'rag trade' to an 'image industry'. The continuous decline and contraction of manufacturing in terms of employment and firms has forced the industry to gradually downsize and focus on high-quality design in order to increase the value of domestic production, enhance its competitiveness and survive in the post-industrial economy (Evans and Smith, 2006; Hauge et al., 2009; Jansson and Power, 2010; Williams and Currid-Halkett, 2011; Huang et al., 2016).

In particular, the creative and design element of fashion has played a significant role in the upgrading of declining clothing and textile industries (Bettiol et al., 2009; Skov, 2011). In the last decades, in order to cope with the challenges deriving from globalization, an increasing number of fashion industries both from developed and developing countries have enacted a shift towards more creativity- and design-intensive forms of production, which include novelty and constant innovation (Scott, 2002; Rantisi, 2004a; Evans and Smith, 2006). In certain instances, firms that were merely specialised in the material making of garments have begun to diversify in other areas such as hotels, restaurants, cafes, and other unrelated businesses (Jansson and Power, 2010). Such a transition of the industry from manufacturing-into design-oriented has been carried out thanks to the support of a number of institutional actors and cultural intermediaries, such as educational institutions, promotional media systems and showcase events (Williams and Currid-Halkett, 2011).

In addition to major cities of fashion, also fashion industries belonging to other geographical contexts have upgraded clothing and textiles manufacturing through higher-value activities linked to creativity and design. In particular, the city of Taiwan is an interesting example to address the transformation of clothing and textiles production towards a designer fashion industry (Hauge, 2007; Weller, 2014). The economic liberalization, together with the extraordinary development of China and Southeast Asia in the 1990s, thoroughly affected the

structure and nature of the Taiwanese fashion industry, whose manufacturing base has gradually shifted towards areas with lower labour and real estate costs, causing a lack of indigenous fashion designers. However, starting from the 1990s, a new designer fashion industry has emerged locally. This economic model, which involves the relocation of manufacturing overseas and the retention of design-based activities locally, has become dominant in the global fashion industry of the twentieth century (Huang et al., 2016).

Nowadays, the fashion industry is produced under conditions associated with both globalization and localization. In fact, it includes a highly globalised fashion manufacturing industry still based on the traditional Fordistic logics and a higher-value design-oriented fashion industry, which is comprised of value-creating and image-producing activities for the production of symbolism such as fashion design, brand-name manufacturing, advertising, marketing, retailing and distribution. Moreover, while the former is generally located in large developing countries, the latter tends to concentrate in developed countries, particularly in global cities like London and New York (Aspers, 2010). Thus, fashion design, together with the consumption of fashion, has been separated from physical production not only in terms of geographical distance but also of economic, linguistic, religious, and cultural distance (Aspers, 2010; Skov, 2011). The detachment of the geographies of fashion design from those of fashion manufacturing has led the fashion industry to growingly concentrate in space. The next sections, through the adoption of a Global Value Chain approach, look closely at how phenomena of globalization have impacted on the fashion industry and its international geographies.

1.4.1. Analysing the fashion industry's transformation from a GVC perspective

The 'global value chain' (GVC) approach has been widely adopted to understand the evolution of industries, as well as the production and distribution of value across different economic actors into various geographical areas. This specific framework can help to further explore the impact of globalization on the fashion industry and to shed light upon the current international geography of textile and apparel manufacturing. According to this approach, the subsequent economic connections in the production process are regulated by long-term contractual relationships, and economic power is concentrated in the hands of a few actors located at particular stages of the value chain. A global commodity chain involves the whole range of activities that are behind the development of a final product, namely design, production and marketing. Multinational enterprises (MNEs), which include buyers, global

brands, and producers, are the main players of this process and control the activities of the chain that is highly fragmented at global level. In particular, there are two models of governance structures that are associated with different organizational forms of international economic coordination: the 'producer-driven' value chain[3] where manufacturers play a central role in coordinating production networks, and the 'buyer-driven' value chain where retailers, marketers and branded manufacturers have a leading role in establishing decentralised production networks in a range of exporting countries (Gereffi, 1999; Bair and Gereffi, 2003; De Marchi et al., 2018).

The textile and apparel industry is a classical example of 'buyer-driven' commodity chain, which is characterised by globally dispersed production systems (Bair and Gereffi, 2001), as well as by power asymmetries between global buyers and suppliers of products. Global buyers, who are typically headquartered in the main markets of developed countries (e.g., Europe, United States), play a leading role in the organization of global production. With the growing dispersion of apparel production, they have developed extensive global sourcing capabilities. More specifically, they have moved out from production into higher-value activities in the global supply chain (i.e., design, marketing and branding), outsourcing[4] manufacturing to a global network of suppliers commonly located in developing countries and emerging economies (Gereffi and Frederick, 2010; Fernandez-Stark et al., 2011). In this regard, global buyers have been defined as 'manufacturers without factories' as they now separate the 'physical' production of goods from the more 'intangible' aspects of the value chain (Gereffi, 1999; Bair and Gereffi, 2003; Aspers, 2010). High-value research, design, marketing, and financial services allow these global buyers to act as strategic brokers in linking overseas factories with product niches in their final consumer markets, which strongly affect the entire value chain in terms of what, how and where producing a specific garment (Bair and Gereffi, 2001; Gereffi and Memedovic, 2003). Over time, they have sought to lower costs, as well as increasing their margins and their levels of ownership in a growingly competitive domestic environment. As a result, over the years, the global fashion industry has been transformed by an increase in offshore production, the importance of branding, and a consolidation at the retail end of the chain.

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[3] It is usually associated with capital- and technology-intensive industries such as automobiles, aircraft and computers (Gereffi and Memedovic, 2003).
[4] Since the increase of phenomena of globalization, the apparel value chain has also included intermediaries like import and export agencies that source garment materials from low-cost manufacturing countries (Fernandez-Stark et al., 2011).

The textile and apparel industry is regarded as one of oldest, most globalised and leading export industries in the world, as well as a significant engine for economic growth in both developed and less developed countries. In particular, due to its low-fixed costs, low-technology base and emphasis on labour intensive manufacturing, it is considered a typical 'starter industry' for developing countries that specialize in export-oriented apparel manufacturing. As an example, drawing upon textile and apparel industry as entry point, several Asian economies have turned to become high-income countries (OECD et al., 2013). Nowadays, this industry provides employment to millions of workers in the world, some of them in the least-developed regions (Fernandez-Stark et al., 2011). However, starting from the early 1970s, the ability of developing countries to enter this industry was severely constrained by a complex system of country-limits (i.e., export quotas) on the volume of certain imported textile and apparel items. These trade restrictions were set by importing countries under the Multi-Fibre Arrangement (MFA), and were aimed at protecting the domestic industries of European Union (EU) and US from cheap imports from developing countries, particularly from highly competitive suppliers like China. Nevertheless, several small low-income developing countries like Bangladesh benefited from such a trade regulation and were able to enter the export apparel market sheltered from the leading low-cost competitors (Gereffi and Memedovic, 2003; Gereffi and Frederich, 2010; Pickles and Godfrey, 2013; Son and Yoon, 2014).

Later, between 1995 and 2005, the MFA was phased out under the World Trade Organization's (WTO's) Agreement on Textile and Clothing (ATC). The removal of quota-constrained trade in the industry caused new highly significant changes in the geography of apparel manufacturing. Notably, it led to both a consolidation and rationalization of the global supply chain by strongly intensifying the outsourcing of clothing production (Evans and Smith, 2006; Gereffi and Frederick, 2010). Between 2005 and 2011, the value of global clothing exports increased by 48% (OECD et al., 2013). In a quota-free world, retailers and buyers are allowed to source textile and apparel products in unlimited amount from any country in the world. As a result, lead firms have enacted a profound process of restructuring of their sourcing networks by developing long-term relationships with a restricted number of more efficient and strategically located low-cost suppliers in large developing countries like China and India. In this context, not only labour costs but also productivity, flexibility, capabilities, shorter lead times, proximity to main markets and compliance with specific social and environmental standards have become key factors for country competitiveness

(Pickles et al., 2015). In this regard, low-cost manufacturers in Turkey, North Africa, Central and Eastern Europe have benefited from competitive advantages that are also based on proximity to principal markets and shorter lead times in developing fashion production (Evans and Smith, 2006). Network relationships have become more and more complex due to the specialization of apparel products, the development of fast fashion systems, and the increase of countries with high manufacturing competences. Developing countries have faced a growing competition for contracts with global brand owners, and leading clothing supplier firms and countries have strengthened their position in the value chain. In this context, the concept of 'upgrading' towards higher value-added activities has become crucial for building a sustainable competitive advantage in order to remain or enter the value chain of a growingly globalized industry (Gereffi et al. 2005; Bettiol et al., 2010).

1.4.2. The 'upgrading' of the fashion industry towards higher value-added activities

In the apparel value chain, four main business models have been identified. Cut, Make and Trim assembly (CMT) is a process in which apparel manufacturing companies are provided with imported inputs for assembling garments in accordance to the buyers' specifications. Original Equipment Manufacturing (OEM) or full-package model means the devolution of a great range of activities from the lead firm, with usually little experience in manufacturing, to the contract manufacturer, who completes all the different phases of the production process like material sourcing, quality control, garment finishing and packaging, with the exception of design and distribution of products. Original Design Manufacturing (ODM) and Original Brand Manufacturing (OBM) involve a shift beyond manufacturing towards design, branding, and services. In the ODM, the contractor carries out all the phases involved in the production of a finished garment including design and product development process. In the OBM, which usually marks the beginning of brand development for products sold in the home country, the contractor focuses also on branding. These four business models form a hierarchy where CMT is the lowest in terms of value addition and OBM is the highest.

'Upgrading' in the apparel industry can be conceptualised in 'moving out from pure manufacturing processes and focusing on more immaterial activities such as marketing, branding, services, design and innovation in order to capture more value within the Global Value Chain' (Bettiol et al., 2009, p. 9). More specifically, by taking into account the four business models, it means moving from low-value and high-volume CMT assembly model to

more integrated forms of manufacturing like OEM, ODM and OBM (Gereffi, 1999; Gereffi and Frederick, 2010). An organizational learning process along the apparel value chain allows suppliers to create new forms of competitive advantage, to increase their capabilities and to improve their position in production networks. In fact, through the coordination of networks with different kinds of lead firms, suppliers have access to distinct pools of design, production, and marketing resources (Bair and Gereffi, 2003). Economic upgrading can be achieved through the transformation of manufacturing processes or products into higher value-added operations, or also by shifting towards higher-value and technological sophisticated functions or sectors (Bair and Gereffi, 2003; Aspers, 2010; Fernandez-Stark et al., 2011).

Over time, the desire of buyers to reduce the complexity of operations and costs, as well as increasing flexibility, has spurred the shift from CMT to OEM package contractors, where a process of learning and observing takes place in the context of long-term and stable relationships (Gereffi 1999; Tokatli and Kizilgün, 2004). In particular, suppliers gain better knowledge of final consumer markets and 'develop the capability to interpret design, make samples, source the needed inputs, monitor product quality, meet the buyer's price and guarantee on-time delivery' (Gereffi et al., 2005, p. 92). When full-package suppliers become able to provide all the organization needed to convert buyers' design into finished products, they develop the potential to exclude buyers from the relationship by turning to ODM or OBM models (Gereffi, 1999). When manufacturers target their home market, they may overcome the issue of contextual knowledge and cut many costs like information, knowledge, and transportation (Aspers, 2010). Nowadays, the countries that cannot meet the more demanding requirements of OEM, ODM, and OBM production risk being marginalized in the apparel value chain (Fernandez-Stark et al., 2011).

While favourable trade agreements[5], low-cost labour and proximity to end-markets facilitate the entry into the lowest segments of the value chain, other factors become relevant when upgrading into higher activities. In particular, the development of a domestic textile industry and the presence of large apparel manufacturing firms in the country facilitate industrial upgrading towards OEM, whereas a strong commitment to develop talented human capital and to establish a national brand (e.g., through the development of fashion design schools, fairs and fashion shows) contributes to shifts towards ODM and OBM models (Fernandez-Stark et al., 2011; Gopura et al., 2016). As an example, fostering collaborations with

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[5] Bangladesh and Sri Lanka benefited significantly from preferential trade agreements with Europe and the United States, which facilitated their early entry and growth (Gereffi, 2010).

successful training institutions in developed countries like France, Germany, Italy, and the United States, as well as hiring foreign consultants to develop domestic talent can speed the learning process for upgrading. In this regard, the London College of Fashion has relationships with Bangladesh, Sri Lanka, and Turkey (Fernandez-Stark et al., 2011). Moreover, the position that a firm occupies in the supply chain matters: firms located at the bottom of the supply chain have more difficulties in implementing upgrading strategies. This is due to the lack of financial capital and networks that prevents firms from learning new strategies as well as developing new products and processes.

1.4.3. The new geography of the global textile and apparel industry

Over the years, the global textile and apparel industry has undergone several production migrations, particularly associated with countries' labour costs, the removal of trade barriers, and government policies on export activities. The industry has gradually shifted from developed countries, which have increasingly focused on design-oriented functions, to a range of efficient and low-cost suppliers mostly located in large developing countries. Moreover, a process of economic upgrading towards higher-value activities has allowed minor exporting countries and suppliers to survive into a growingly competitive textile and apparel value chain. More specifically, starting from the 1970s, employment in developed countries like Germany, UK, France, and United States has declined, whereas China has become the dominant producer and exporter in the global textile and apparel value chain. Although in the 1970s and 1980s, the Newly Industrialised Countries (NICs) of Hong Kong, South Korea, and Taiwan were among the most important players in the industry, later, in the 1990s, they began to invest heavily in a range of least-cost countries like Indonesia, Thailand, Philippines, Singapore, Malaysia, and Sri Lanka. In turn, also these countries moved part of their production processes to other countries like Bangladesh, Pakistan, Cambodia, and Vietnam. This system where apparel firms outsource production to lower-wage countries on behalf on global buyers is called 'triangle manufacturing'. In addition, in the 1990s, the North American Free Trade Agreement (NAFTA)[6] made Mexico the privileged supplier of clothing to US and Canada, and, in Central and Eastern Europe, Bulgaria, Hungary, Poland, Romania and the Czech Republic became important exporters to the European market (International

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[6] The North American Free Trade Agreement (NAFTA), which is a trade agreement that entered into force in 1994, has systematically eliminated barriers to free trade and investment between the three NAFTA countries, namely Canada, the United States, and Mexico (Naftanow.org, 2018).

Labour Organization, 1996; Gopura et al., 2016).

Starting from the 2000s, the final demise of the MFA in 2005 together with the economic recession in 2008, have led to a strong consolidation of export production in developing countries[7] and to a strengthening of the position of leading supplying firms and countries. In 2016, the only China and EU accounted for 47% of global apparel exports and 38% of global textile exports (Table 1.2 and 1.3). On the firm level, large suppliers capable of providing more functions beyond manufacturing have benefited at the expense of smaller firms that provide only assembly activities. At the country level, low-cost large Asian countries (e.g., China, Bangladesh, India) have continued to increase their share of global markets at the expense of suppliers in smaller low-income countries, which have been forced to upgrade into higher-value segments in order to maintain their competitiveness (Gereffi, 2010; Fernandez-Stark et al., 2011; Tokatli et al., 2011; Pickles et al., 2015). In 2016, the top five developing countries suppliers of apparel (i.e., China, Bangladesh, Viet Nam, India and Indonesia) accounted for 44% of global apparel export, with the only China reporting 28% of this value (Table 1.2). Generally, top exporters of apparel have been also amongst the major suppliers of textile (OECD et al., 2013). To illustrate, in 2016, China, India, Turkey accounted for 38% of global textile export, with the only China registering 30% of this value (Table 1.3).

Table 1.2. Worldwide clothing exports (Trade value in Million USD), 1980 and 2016

Clothing exports						
1980				2016		
Rank	Country	Trade Value	Percentage on total	Country	Trade Value	Percentage on total
1	Hong Kong, China	4,976.14	13.1	China	158,261.77	27.5
2	Italy	4,583.76	12.1	European Union*	117,164.62	20.3
3	Korea, Republic of	2,949.40	7.8	Bangladesh	28,668.29	5.0
4	Germany	2,881.99	7.6	Viet Nam	24,479.38	4.3
5	Chinese Taipei	2,430.27	6.4	Italy	21,717.43	3.8
6	France	2,293.52	6.0	India	17,966.94	3.1

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[7] As an example, in the mid-1960s developing countries accounted for around 25% of global clothing exports. This value increased to 37% in the late 1980s and to above 80% in 2013 (Pickles et al., 2015).

Rank	Country	Trade Value	Percentage	Country	Trade Value	Percentage
7	United Kingdom	1,806.00	4.8	Germany	17,278.84	3.0
8	China	1,625.00	4.3	Hong Kong, China	15,688.30	2.7
9	United States	1,263.41	3.3	Turkey	15,047.49	2.6
10	Belgium**	999.03	2.6	Spain	12,827.28	2.2
11	Netherlands	875.10	2.3	France	10,889.05	1.9
12	Finland	728.63	1.9	Belgium	8,998.88	1.6
13	India	673.17	1.8	Netherlands	8,354.87	1.5
14	Poland	640.54	1.7	United Kingdom	8,071.22	1.4
15	Portugal	631.46	1.7	Indonesia	7,474.03	1.3
Total	Worldwide	37,943.71	100.0	Worldwide	575,754.36	100.0

Sources: Author's elaboration using data from International Trade and Market Access Data – World Trade Organization (WTO).

Notes: The clothing sector is defined according to Revision 3 of the Standard International Trade Classification (SITC) and refers to division 84 ('articles of apparel and clothing accessories'). *Since 2013, European Union includes the following 28 countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Spain, Slovakia, Slovenia, Sweden and the United Kingdom.
** Belgium-Luxemburg.

Table 1.3. Worldwide textile exports (Trade value in Million USD), 1980 and 2016

	Textile exports					
	1980			2016		
Rank	Country	Trade Value	Percentage on total	Country	Trade Value	Percentage on total
1	Germany	6,295.74	11.4	China	104,662.66	29.5
2	Japan	5,122.74	9.2	European Union*	65,469.65	18.5
3	Italy	4,157.95	7.5	India	16,209.76	4.6
4	United States	3,757.10	6.8	Germany	13,375.85	3.8
5	Belgium**	3,549.87	6.4	United States	12,903.67	3.6
6	France	3,432.18	6.2	Italy	11,707.44	3.3
7	United Kingdom	3,298.80	5.9	Turkey	10,912.54	3.1
8	China	2,540.00	4.6	Korea, Republic of	10.038.59	2.8
9	Netherlands	2,259.43	4.1	Chinese Taipei	8,972.81	2.5
10	Korea, Republic of	2,208.76	4.0	Hong Kong, China	7,900.98	2.2
11	Chinese Taipei	1,771.23	3.2	Pakistan	7,680.26	2,2
12	Hong Kong, China	1,770.51	3.2	Japan	6,418.62	1.8

13	Switzerland	1,534.29	2.8	Viet Nam	6,276.49	1.8
14	India	1,306.24	2.4	Belgium	5,398.00	1.5
15	Austria	1,074.31	1.9	Netherlands	4,801.23	1.4
Total	Worldwide	55,463.51	100.0	Worldwide	354,446.07	100.0

Sources: Author's elaboration using data from International Trade and Market Access Data – World Trade Organization (WTO).
Notes: The textiles sector is defined according to Revision 3 of the Standard International Trade Classification (SITC) and refers to division 65 ('textile yarn, fabrics, made-up articles, n.e.s., and related products'). *Since 2013, European Union includes the following 28 countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Spain, Slovakia, Slovenia, Sweden and the United Kingdom.
** Belgium-Luxemburg.

In addition to developed economies in the European Union and United States, also several developing countries have upgraded their textile and apparel industry towards higher value-added activities. In particular, the East Asian NICs (i.e., Taiwan, South Korea, Hong Kong and Singapore) have been regarded as the model for industrial upgrading among developing countries. In the 1990s, companies located in these countries made a rapid transition from the mere assembly of imported inputs to more domestically integrated and higher value-added forms of exporting, by relying on African, Latin American and other parts of Asian countries for CMT services. In some cases, they have also developed into international competitors of their original clients becoming important players in the industry (Tokatli and Kizilgün, 2004; Gereffi 1999; Gopura et al., 2016). In turn, also smaller developing countries like Sri Lanka, Pakistan, and Turkey[8], facing an intense competition from low-cost large manufacturing countries in the global trading system, have been forced to upgrade into higher-value segments, like branding and design, in order to maintain their competitiveness (Fernandez-Stark et al., 2011; Pickles and Godfrey, 2013).

It is important to note that, in recent years, the economic crisis, in addition to rapidly rising labour costs in developing economies, a fall in demand by advanced industrial economies, and the growing export competition among low-cost suppliers whose competitive advantage has been increasingly eroded by developments in automation, has been leading to a regionalization of the textile and apparel value chain (McKinsey & Company, 2017). In fact, although consumption in the global apparel industry is still concentrated in the European

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[8] Istanbul is moving its clothing and textiles production towards higher-value activities in order to remove its association with low-cost manufacturing and to capture more value in the value chain (BOP Consulting, 2017).

Union and United States, which in 2016 accounted for 47% of global clothing import (Table 1.4), the domestic markets of developing countries like China, India, Brazil, and Turkey have become increasingly attractive (Fernandez-Stark et al., 2011). Recently, the urbanization and industrialization of emerging countries, in addition to the rising purchasing power of a growing and more affluent middle class, have allowed these economies to move towards not only ODM but also OBM models (Gereffi, 2010). In particular, global fashion consumption is gradually shifting towards Asia, which was previously known as the main location for fashion manufacturing (Son and Yoon, 2014). An increasing number of Asian cities like Shanghai and Beijing have recently sought to find a balance between production and consumption (Wang and Sun, 2013). As an example, in 2007, more than half of the apparel production in China was allocated to local consumers (Gereffi and Frederick, 2010) and, between 2005 and 2011, the Chinese domestic apparel market doubled (OECD et al., 2013).

Table 1.4. Worldwide clothing imports (Trade value in Million USD), 1980 and 2016

Clothing import						
1980				2016		
Rank	Country	Trade Value	Percentage on total	Country	Trade Value	Percentage on total
1	Germany	8,326.12	20.0	European Union	185,255.26	31.5
2	United States	6,943.41	16.7	United States	91,173.82	15.5
3	Netherlands	2,874.56	6.9	Germany	35,241.46	6.0
4	United Kingdom	2,857.45	6.9	Japan	27,900.09	4.7
5	France	2,637.18	6.3	France	23,087.78	3.9
6	U.S.S.R. former	2,530.00	6.1	United Kingdom	22,530.24	3.8
7	Belgium**	1,823.78	4.4	Spain	17,611.13	3.0
8	Japan	1,536.70	3.7	Italy	15,495.94	2.6
9	Switzerland	1,455.62	3.5	Netherlands	13,629.32	2.3
10	Sweden	1,344.33	3.2	Hong Kong, China	13,216.48	2.2
11	Austria	940.88	2.3	Canada	9,568.11	1.6
12	Italy	797.06	1.9	Belgium	8,665.42	1.5
13	Canada	714.65	1.7	Korea, Republic of	8,639.63	1.5
14	Norway	709.33	1.7	China	6,448.59	1.1
15	Hong Kong, China	695.19	1.7	Australia	6,412.55	1.1

Total	Worldwide	41,582.20	100.0	Worldwide	588,690.88	100.0

1.4.4. The phenomenon of 'reshoring' and the revival of craftsmanship

Whether suppliers in large developing countries have started to target their own domestic markets, leading firms located in developed countries have recently begun to relocate their production activities back to their home country. This phenomenon, which has been termed as 'reshoring', can be understood as a strategy to enhance firm's value creation for consumers, by using the 'country of origin', design excellence and product uniqueness as competitive base. Higher overseas labour and transportation costs, proximity to final markets, shorter lead times, flexibility, and lower inventory levels, have spurred this process. Moreover, the growing important role of digital technologies and a growing concern for environmental and ethical standards in manufacturing have also contributed to make domestic production increasingly appealing. Overall, this backward trend allows leading firms for higher managerial controls, better time-to-market, access to skilled workers, and the ability to collaborate with manufactures[9] in the overall apparel supply chain, which has now become more and more consumer-centred. In fact, the possibility of frequent visits to manufacturing firms allows leading companies to monitor production processes and product quality (Aakko, 2018).

This phenomenon has been particularly intensified by the need for meeting a growingly sophisticated and changing consumer's demand (Robinson and Hsieh, 2016), which now looks for higher-quality, innovative, authentic, customised, and crafted products and is less oriented towards low-cost production. Nowadays, consumers affect companies' strategies and

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[9] The phenomenon of offshoring has led fashion designers to travel all around the world in order to visit manufacturing firms and to establish positive relationships with contractors, who are mostly located in lower-cost regions (McRobbie, 2013).

become the principal drivers of design, production, and merchandising processes (BOF, 2016). As a result, designers have begun to consider what consumers desire in terms of meaning and to strongly invest in building narratives as part of the design process. In this context, product customization and craftsmanship have been regarded as important factors for competing in an environment characterised by high-cost manufacturing and for changing products according to the individual needs of the customer. Since these elements require flexible, agile, and responsive value chains because of the increasing complexity and differentiation of products, they have fostered the backward process (Pal et al., 2016).

In particular, craftsmanship has been recently re-valued as highly important both for local economies and consumer culture in the contemporary society. Sennett (2008), in his book 'The Craftsman', considers craftsmanship as a 'desire to do a job well for its own sake'. Bettiol and Micelli (2014) define artisanship as the 'hidden side of design' and claim that artisanal work is a crucial phase of the design process. In a simplified view of this process, artisans are associated with manual and technical skills, traditional methods, the 'making process', and materiality (Aakko, 2015). In this regard, Aakko (2018) conceptualises the main characteristics of artisanal fashion through the notion of 'skillful materiality', which refers both to the craft skills needed for designing (e.g., sketching, draping, choosing materials) and making garments (e.g., patternmaking, garment construction, finishing), as well as to the materiality and tangible qualities of products and processes that are strongly associated with the creative work of designers. It is also connected to small-scale production, the significance of local production, high quality and aesthetics of products, and the dedication of a large amount of time. The term also encompasses the intangible qualities and symbolic meanings that are embedded in garments. In this sense, craftsmanship contributes to adding value to items in terms of image, symbols, and meaning by producing unique, high-quality, innovative, and personalised garments. Thus, crafted products are valuable not only in terms of production processes but also of the message they convey (Goretti, 2015).

In a way, craftsmanship can be regarded as the opposite to industrial production, which draws upon large manufacturing of standardised products. However, nowadays, these two modes of production can be regarded as complementary. In fact, with the advent of industrialized production, artisans still play an important role in helping designers to transform ideas into reality, although their role has been limited to specific phases of the design process like first prototyping for testing new materials, technologies and methods (Bettiol and Micelli 2014). In particular, they contribute to filling the gap between products and customers' expectations

and work inside the industrial environment to improve the complexity and quality of products. Moreover, the increasingly common collaboration and knowledge exchange between designers and artisans in the process of making garments contributes to fostering an innovative and creative environment, where new ideas, products, and processes may easily arise (Temeltaş, 2017). The degree of collaboration mainly depends on designer's preference, skills, and scale of business. In fact, in small companies, it is more likely to have an active participation of the designer in the phases of designing and prototyping (Kawamura, 2005). As an example, Italian fashion manufacturing firms, which have a long tradition in artisanal production, have recently combined innovative technologies to traditional artisanal processes. In particular, Florence is internationally recognised for being a strategic location for a continuous exchange of experience, ideas, knowledge, and creativity between fashion designers and artisans (Lazzeretti et al., 2017).

The revival of craftsmanship contributes also to strengthening the artistic tradition and culture of a territory, as well as the connections between a product, the place where it is produced, and the skilled workers (Cimatti and Campana 2015). Nowadays, the 'made in' effect and the preservation of traditional craftsmanship associated with heritage countries are perceived as more important of cost savings, and consumers are open to pay a premium for artisanal goods. The image of products is often linked to ancient techniques of artisan production, as in the case of Florence and its historical tradition in crafted leather goods. Thus, in recent years, a growing number of leading firms have sought to position their products as artisanal in order to differentiate these from competitors, justify high prices, emphasize their uniqueness, and meet the consumers' interest for place of origin. Some aesthetic details like minor irregularities on garments can help highlight the artisanal nature as well as the uniqueness and authenticity of products. Moreover, several luxury fashion brands like Gucci and Hermes have opened their workshops to the public in order to highlight the crafted work behind their products. Moreover, artisans stitching bags or shoes have been often featured in advertising campaigns. Particularly in fashion capitals, craft skills play also an important role in fashion design courses (Bhaduri and Stanforth, 2017).

1.5. Fashion design, creativity and culture

1.5.1. Designer fashion industry as part of Cultural and Creative Industries (CCIs)

The rising importance of the creativity- and design-oriented nature of fashion has led to regard the 'designer fashion industry' as a key component of the CCIs (Scott, 2000; DCMS, 2001; Breward and Gilbert, 2006; European Commission, 2010; Hu and Chen, 2014; Lazzeretti et al., 2017). The first attempt to define the creative industries was made by the Department for Culture, Media and Sport (DCMS) in the first two mapping documents of the creative sector (DCMS, 1998; 2001), which were aimed at defining economic activity across thirteen creative industries. As previously discussed, these industries were originally defined in terms of their capability of creating jobs and wealth through the development of intellectual property thanks to individual creativity, skills and talent. In 1998, DCMS included the designer fashion sector as economic contributor to creative industries. More specifically, DMCS (2001) classified, as creative industries, Advertising, Architecture, Art and Antiques Markets, Crafts, Design, Designer Fashion, Interactive Leisure Software, Film and Video, Music, Performing Arts, Publishing, Software and Computer Services, Television and Radio. This taxonomy, which includes both cultural and creative activities, has been one of the most applied approaches within studies involving the definition of cultural and creative industries at European level. In this framework, the designer fashion industry can be defined as one sub-category of the 'design sector' of the CCIs (Hu and Chen, 2014).

However, although CCIs have been traditionally regarded as synonymous terms, more recent and broader approaches of classification have involved a separation between these industries (Lazzeretti, 2012). The Green Paper of the European Commission (2010) has regarded 'cultural industries' as 'those industries producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have'. More specifically, they include traditional sectors like Performing Arts, Film and Video, Television and Radio, Publishing, Music and so on. On the other hand, 'creative industries' are defined as 'those industries, which use culture as an input and have a cultural dimension, although their outputs are mainly functional' (European Commission, 2010, p. 6). They comprise sectors endowed with a creative component like Architecture and Design, Graphic Design, Fashion Design and Advertising. Thus, according to the restored separation

between the terms 'cultural industries' and 'creative industries', the designer fashion industry is defined as a sub-sector of the group of the creative industries of 'architecture and design'.

1.5.2. Designer fashion industry and Cultural Economy

As part of CCIs, the designer fashion industry has emerged as a central element of the 'cultural economy', a strand of research that has received increased attention due to the widespread acknowledgment of culture as a key driver for economic growth (Scott, 1996; 2000; Hall, 2000; Williams and Currid-Halkett, 2011). Scott (1996; 1997; 2000; 2001) defines the 'cultural economy' as a group of sectors, which is identifiable at the point of intersection between the way, in the modern capitalism, goods and services are increasingly infused with aesthetic, intellectual and semiotic content and, equally, growing modern culture is being produced in the commodity form. Cultural forms have become the main components of productive strategies, and culture has been increasingly subject to commodification. These industries include the media, fashion-intensive consumer goods sectors (e.g., clothing, jewellery, fine leather goods), other types of services, creative professions, and facilities for cultural consumption like museums, theatres, and art galleries (Scott, 2001).

In recent years, the post-Fordist production system has seen a rising importance of cultural products' industries in national employment and output. Unlike Fordist industries that are based on mass market and standardization of products (Scott, 1996; Hall, 2000), these industries are characterised by goods and services, which are valued more for the emotional, aesthetic, and semiotic attributes than for their utilitarian function (Scott, 2004). The innovation- and design-intensive nature of these products emphasises the significance of creation of symbolism rather than of manufacturing processes. They represent a significant basis for competitive advantage in contemporary economic landscapes and a powerful means of urban regeneration through the creation of symbolic value in different geographical contexts. They have been regarded particularly important for revitalising both large cosmopolitan areas and old industrial cities with declining manufacturing bases (Scott, 1996; 1997; 2000; 2004; Hall, 2000; Rantisi, 2011).

The creative aspect of fashion, which is associated with the designer fashion industry, embodies significant symbolic and aesthetic value that is mostly included in the design of products. It originates from a traditional manufacturing sector (Scott, 1997) and is characterised by continuously changing environments and high demand for innovation.

Moreover, designer fashion products are highly associated with the commodification of culture. The immaterial component helps define commodities as semiotic items, whose economic value is strongly linked to the perception and meanings people give items rather than to the real functionality of goods (Power and Scott, 2004; Rantisi, 2004b; Santagata, 2004; Kawamura, 2005; Reimer, 2009; D'Ovidio, 2010, Knox, 2011). As a result, the designer fashion industry has been described as a 'cultural commodity' (Weller, 2008) and as a typical segment of the cultural industry. It is 'engaged in the creation of marketable outputs whose competitive qualities depend on the fact that they function at least in part as personal ornaments, modes of social display, aestheticized objects, forms on entertainment and distraction, or sources of information and self-awareness, i.e. as artefacts whose physic gratification to the consumer is high relative to utilitarian purpose' (Scott, 1997, pp. 323-324).

Nowadays, consumers attribute greater value to high-quality design than to utilitarian and functional characteristics of products, which are taken for granted (Santagata, 2004; Scott, 2004; Evans and Smith, 2006; Chilese and Russo, 2008). Consumers' needs are increasingly complex, and they look for cultural, intangible, and symbolic goods as well as for unique experiences of consumption. Products, which become 'symbols', are evaluated in social settings and used by individuals for expressing and defining their identity (Aage and Belussi, 2008; Bettiol et al., 2009; D'Ovidio, 2016). In this regard, Scott (2004, p. 462) defines fashion as a manufactured product 'through which consumers construct distinctive forms of individuality, self-affirmation, and social display'. In this sense, post-modern consumption is strongly characterised by the presence of fashion design, which contributes to the 'aestheticization' and 'semioticization' of contemporary daily life.

Cultural products' industries are infused with strong evocation of their places of origin. Various elements of the cultural economy are involved in 'an image-generating complex', which continuously creates and re-creates associations with place-specific connotations (Scott, 2000). There exists a strong and reciprocal relationship between place and culture: on the one hand, place is a locus of dense social life and human interchange with a significant role in the production process of immaterial value; on the other hand, culture is a phenomenon that tends to have strong place-specific characteristics (Scott, 1997). According to Scott (1996, p. 306), cultural products are endowed with production networks, which are strictly associated with places through a 'unique structure of mental associations that can be turned to commercial purpose'. Moreover, the identity and image of cities is usually located in a symbolic imaginary context associated with a specific local production system (Godart, 2014).

Therefore, the concentration of cultural industries in specific geographical locations allows products to brand places, and places to brand products.

The strong symbiosis between place, culture and economy creates a virtuous circle where the generation of positive images and symbols leads cultural products and the related industries to enjoy a sort of monopoly power (i.e., 'monopoly rent') of places, which enhances their competitive advantage and their success on wider markets (Molotch, 1996; Scott, 1997; Power and Scott, 2004; Jansson and Power, 2010; Tokatli, 2012b). 'The positive connection of product image to place yields a kind of 'monopoly rent' that adheres to places, their insignia, and the brand names that may attach to them. Their industries grow as a result, and the local economic base takes its shape. Favourable images create entry barriers for products from competing places' (Molotch, 1996. p. 230). The clustering and branding of cultural products in specific places contribute to attracting cultural producers, who in turn reinforce the association between cultural products and places (Currid, 2007b).

Additionally, according to Scott (1996), the association between cultural products and the specific qualities of places where these goods are produced creates a sense of 'authenticity' for consumers. In a similar vein, Molotch (1996, p. 228) contends that 'the image of places come from the sense people have – local people and those far away – of the cultural-material interaction with them'. And this reputation of place becomes another aspect of local economic structure, a part of its geographic capital'. This symbiosis between place and cultural products' industries is particularly evident in the world cities (e.g., New York, Berlin, Tokyo, London, Los Angeles, Paris), which have been defined as central locations of the new global cultural economy. In sum, cities become endowed with distinctive authenticity and reputation, whereas cultural products with a powerful competitive advantage (Rantisi, 2004b; Storper and Scott, 2009).

As an example, the designer fashion firms Chanel, Gucci, and Armani have long relied upon and transformed the symbolic and value-adding resources associated with Paris, Florence, and Milan into powerful monopoly rents (Tokatli, 2012a; 2014). In particular, these cities act as 'fountainhead(s) of unique products characteristics, especially where local crafts, traditions, cultural resources, sensibilities, skills, design and so on, are available for exploitation' (Scott, 2009, p. 586). The clustering of cultural production determines the 'place in product', which is defined as the branding of cultural goods through the association with a specific location of production (Molotch, 2002). This, in turn, allows the place to maintain its monopoly in the marketplace (Currid-Halkett, 2007a; Scott, 2013). Producers of symbolic goods provide cities

with a final output, which reflects the distinctive identity and reputation of specific urban clusters. As a result, the city becomes an essential input in the production process. Cities benefit from a monopoly rent that derives from an urban image created through the association with cultural products and firms. Fashion and graphic design in New York, architecture, fashion and publishing in London, furniture, industrial design and fashion in Milan are examples of cultural products' industry-city associations (Knox, 2011).

Cities may also develop unique forms of specialised production, which contribute to generating strong symbolic associations between place and cultural goods. Parisian haute couture, Florentine leather goods and Milanese ready-to-wear are interesting examples for understanding how the reputation of specialised cultural products can be tied to particular places. These specific forms of cultural production have grown thanks to place-based competitive advantages and, more specifically, the monopoly rents generated by place images (Scott, 1996; 1997). Paris, Florence and Milan have been described as cities characterized by a reputation 'congealed in their products', 'by reason of local tradition and symbologies', which enrich them with strong local authenticity (Molotch, 1996; 2002; Scott, 2008, p. 94). Moreover, Scott (2002, p. 1302) claims that 'the creative capabilities, innovative energies and value-adding resources associated with a particular place seem to be a form of socialised wealth that is potentially accessible to all who are located there'. In this regard, place-based images generated by specific place-product associations can be beneficial also to other industries. For instance, the strong identity and monopoly power of Los Angeles, which is associated with the entertainment and media industry of Hollywood, can increase the competitive advantage of the flourishing local designer fashion industry (Scott, 2002; Williams and Currid-Halkett, 2011).

In sum, the cultural economy approach to cities (Scott, 1997; 2000; Evans, 2003) emphasises the typology of cultural connections between place and goods, which have been central features of the history of the fashion's world cities. There exists a reciprocal relationship between fashion and the city. In particular, fashion and cities are symbolically connected through an image-generating process, which includes the continuous formation and dissemination of 'place-based' positive associations, images and symbols (Figure 1.2). On the one hand, the designer fashion industry gains advantage from the positive image of cities where it is localised in terms of local creativity, production, culture, and traditions (Crewe and Beaverstock, 1998; Pratt et al., 2012). At this stage, place-based images are attached to products, firms, and sectors. In this respect, fashion has long benefited from positive images

and narratives that industries and knowledge communities have attached to cities over time, such as the elegance of Paris or modernity of New York (Gilbert, 2000; Leslie and Rantisi, 2009; Jansson and Power, 2010; Berry, 2011).

On the other hand, interconnected local actors, who are interested in fashion for various reasons, use cities for their branding strategies as a tool for competitiveness. Thus, the designer fashion industry contributes to generating identity, distinctiveness and authenticity of urban environments, functioning as a complex system of messages, symbols and narratives that builds the image and meaning of cities (Santagata, 2004; Gilbert, 2006; Boontharm, 2015). These images that symbolically connect urban environments with fashion design are self-reinforcing over time and are capable of triggering the accumulation of symbolic and cultural capital of cities, which has become a key activity for positioning cities in the international geography of fashion. Thus, they also contribute to supporting and perpetuating the reputation and identity of fashion centres (Larner et al., 2007; Power and Hauge, 2008; Jansson and Power, 2010; Scott, 2010; Skivko, 2016).

Figure 1.2. Image-generating process of the designer fashion industry in cities

**SELF-REINFORCING
IMAGE-GENERATING PROCESS**

DESIGNER FASHION INDUSTRY

CITIES ARE ENDOWED WITH AUTHENTICITY, REPUTATION AND DISTINCTIVENESS

BRANDING PROCESS

COMPETITIVE ADVANTAGE OF THE DESIGNER FASHION INDUSTRY (MONOPOLY POWER)

URBAN ENVIRONMENT

CREATION AND RE-CREATION OF POSITIVE SYMBOLS, IMAGES AND ASSOCIATIONS LINKING CITIES WTH FASHION DESIGN

CREATION OF SYMBOLIC AND CULTURAL CAPITAL OF CITIES AND PROMOTION OF THE STATUS OF THE FASHION CITY

Sources: Author's elaboration.

1.6. The rise of the 'fashion city': A new paradigm for local economic development

The rising emphasis on fashion design as a key element of the emerging paradigm of the CCIs and of the cultural economy has shed light on the high economic and cultural significance of this element, which has been regarded as a new powerful engine for local development and as an essential feature of contemporary capitalism. Cities have long relied on fashion for economic competitiveness and cultural distinctiveness (Gilbert, 2006). However, nowadays, this industry has been posited at the centre of the value production chain and has been increasingly regarded as a key element for urban competitive differentiation and economic success (Santagata, 2004; Santagata et al., 2009). In this sense, fashion design has also

become an essential communication tool and identity-creator for building cultural capital of cities and for making contemporary urban environments identifiable as 'creative places' (Crewe and Goodrum, 2000; Rantisi, 2004a; Kawamura, 2005; Currid, 2007a; Paulicelli and Clark, 2009; Melchior, 2011; Rantisi, 2011; Segre Reinach, 2011; Pratt et al., 2012; Scott, 2014; D'Ovidio, 2016). As a result, it has been included within the so-called image-producing industries of the 'cognitive-cultural capitalism', which draw upon the creation and commercialization of items aimed at producing and disseminating significant cultural and semiotic meanings in the contemporary society (Scott, 1996; Kawamura, 2005; Jansson and Power, 2010).

Crewe (2008, p. 26) claims that 'the fashion industry is an important creative component in the making of the economy and has made a major contribution to the contemporary proliferation of material culture and ways of narrating self and identity'. In fact, creativity embodied in fashion design can alter the way people see goods and urban environments, and of defining them as 'symbolic'. This contributes to shaping their identity, reputation, and authenticity (Knox, 2011; Boontharm, 2015). In particular, this industry is able to generate high levels of income as well as attracting tourism, investments, and companies, notably thanks to an entire media system around the promotion of place-based images that create important symbolic connections between fashion and cities (Gilbert, 2006; Knox, 2011; Berry, 2012).

In sum, fashion design plays a significant role in the de-industrialised economies, functioning as a fundamental driver for contemporary urban life and for strengthening the relationship between culture, place, and economy. In this respect, it has been defined as a powerful means able to contribute to local economic development through creative and immaterial processes and to revamp global and local economies (Power and Scott, 2004). In recent years, a growing number of urban development policies aimed at regenerating economies through CCIs and at promoting the paradigm of the cultural economy and of the creative city have included this element within their local strategies (Gilbert, 2006; Vicari, 2010; McRobbie, 2013; Boontharm, 2015). Urban branding practices have increasingly relied on this element with the aim of generating new 'creative images' for cities (Gilbert, 2006; Hu and Chen, 2014). In this regard, fashion policies are generally part of broader cultural policies aimed at promoting fashion cultures and new urban landscapes through cultural facilities, a range of actors and institutions, and urban branding strategies (Hu and Chen, 2014).

The idea of the 'fashion city' has emerged as a new important paradigm for local economic development and as a strategic factor for developing and revitalising economies of major and minor cities in the world (Breward and Gilbert, 2006). In such context, fashion design has been defined as a key feature for repositioning cities as attractive destinations to consumers, media and tourists, as well as to investments, creative talent and international companies (Crewe and Goodrum, 2000; Leslie and Rantisi 2009; Paulicelli and Clark, 2009; Melchior, 2011; Segre Reinach, 2011). Local governments, 'urban-booster' commentaries, and some academic approaches have all been devoting a great deal of attention to this phenomenon.

Due to the erosion of manufacturing industries and the emergence of an economy focused on creativity, knowledge, and innovation, most of the attention has been paid on distinguishing cities on the basis of symbolic forms of production (Rantisi and Leslie, 2006). More specifically, with the increasing indistinct and uniform nature of places in the globalised economy, cultural distinctiveness and local identity have become fundamental elements for enhancing local heritage and craftsmanship, and for competing globally (Kawamura, 2005; Potvin, 2009; Melchior, 2011; Bettiol, 2015). In such a context, fashion design has been considered a powerful means of transforming places by altering their identity and image. Thus, making a city 'fashionable' has been included within a growing number of local governments' strategies for the creation and communication of distinctive place-based images and identities in the wider global economy (Leslie and Rantisi, 2009; Potvin, 2009; Paulicelli, 2014).

As a result, in the recent decades, an increasing number of city governments have sought to transform urban centres, other than the traditional fashion's world cities (e.g., New York, Milan, Paris, London), into new fashion cities (Rantisi and Leslie, 2006; Larner *et al.*, 2007). Amsterdam, Antwerp, Bangkok, Barcelona, Berlin, Copenhagen, Dakar, New Delhi, Hong Kong, Istanbul, Lagos, Lisbon, Melbourne, Moscow, Nairobi, Seoul, Sidney, Shanghai, Stockholm, Toronto, Vienna, Warsaw and many others have gradually become more or less significant sites of fashion culture. These centres are not included in the traditional urban hierarchy of fashion's world cities and have been termed as 'second-tier' or 'not-so-global' cities of fashion (Skov, 2011; Conference 'Fashioning the City', 2012; Ling, 2012).

The development and consolidation of local designer fashion industries, as part of CCIs, have represented a first important strategic factor for the viability of a fashion city (Scott, 2004; Leslie, 2006; Skov, 2011). However, the development and promotion of a fashion city is not only associated with the narrow definition of the 'designer fashion industry', but also with the broader category of the 'fashion industry' that includes image-making activities like fashion

weeks, trade fairs, magazines, media events, flagships stores, shopping malls and fashion museums. These elements have been included among the most important channels able to attract firms, consumers, and creative talent to cities, as well as establishing the reputation of contemporary fashion centres (Santagata et al. 2009; Jansson and Power 2010).

Over time, fashion and cities have generated a great deal of interest among scholars from various academic fields. The sociologist Georg Simmel (1957) was the first to address the relationship between fashion and the city. He highlighted how cities of the nineteenth century had created a specific environment, where individuals relied upon fashion culture for social distinction, individuality, and uniformity. In more recent decades, the academic debate on urban fashion has shifted from sociology to cultural studies and economic geography, due to the rising interest in urban creative economies (McRobbie, 2013). To this day, there exists a vast array of studies from cross-disciplinary fields, such as Urban Planning, Urban Sociology, Economic Geography, Regional Studies, Cultural and Creative Economy, Place Branding and Economic History, which have variously focused on different aspects of the relationship between fashion and cities. In recent years, academics have devoted growing attention to this phenomenon, which has been the subject of an increasing number of studies (Figure 1.3).

Figure 1.3. Annual number of citations of the terms 'fashion city' and 'fashion cities' as recorded by Google Scholar, 1996-2016

Sources: Author's elaboration.

54
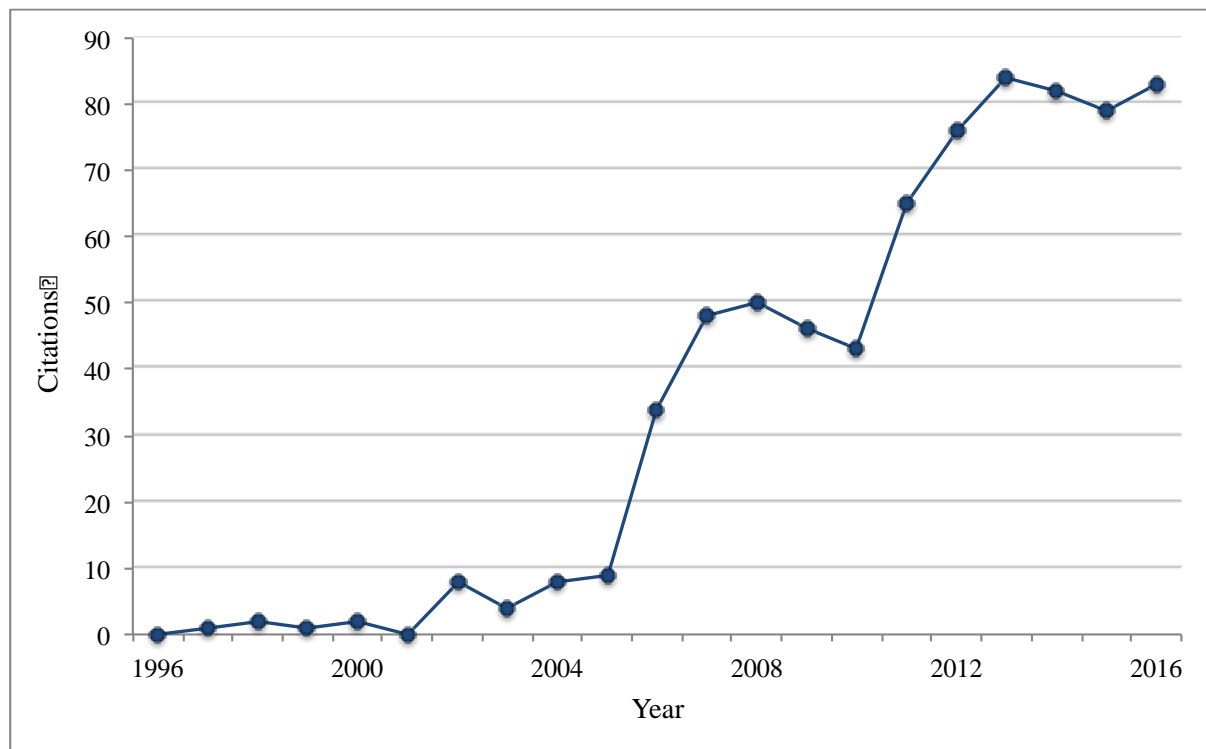
Firstly, a number of studies have analysed the historical formation, economic structure and more recent evolution of traditional fashion centres like New York, Milan, Paris, and London (Scott, 2002; Rantisi, 2002; 2004a, 2006; Breward and Gilbert, 2006; Evans and Smith, 2006; Merlo and Polese, 2006; Segre Reinach, 2006; Rocamora, 2006; 2009; Jansson and Power, 2010). Secondly, another stream of research has focused on the significance of fashion design and the broader 'fashion industry' as devices capable of developing and revamping contemporary cities, as well as on the analysis of more recent and alternative centres of fashion culture (Kawamura, 2006; Larner et al., 2007; Martìnez, 2007; Chilese and Russo, 2008; Paulicelli and Clark, 2009; Melchior, 2011; Rantisi, 2011; Skov, 2011; Williams and Currid-Halkett, 2011; Vanichbuncha, 2012; Leslie et al., 2014; Boontharm, 2015; Pandolfi, 2015). Lastly, further research has addressed more closely the relationship between fashion, cities, and economy, particularly through the examination of elements, factors and conditions that are integral part of traditional and newer fashion centres (Crewe and Beaverstock, 1998; McRobbie, 1998; Gilbert, 2000; 2006; 2013; Rantisi, 2004b; Bovone, 2005; Hauge, 2007; Wenting, 2008; Potvin, 2009; D'Ovidio, 2010; Aage and Belussi, 2008; Harvey, 2011; Leslie and Brail, 2011; Wenting et al., 2011; Pratt et al., 2012; Shi et al., 2012; Tokatli, 2011, 2012b; Volonté, 2010; 2012; Hu and Chen, 2014).

However, despite the increased attention to the topic and the vast array of studies dedicated to this phenomenon, it is not easy to identify a well-defined and structured theoretical framework to clearly understand the relationship between fashion and cities. Over time, scholars from different disciplinary fields have used various and disconnected approaches to explore urban fashion. Moreover, they have primarily focused on the analysis of fashion centres and of single elements that are part of the relationship between fashion and urban economies, without addressing the phenomenon as whole. To this day, it does not exist a clear definition of the fashion city and very few attempts have been made to contextualise this phenomenon in a precise theory.

Scott (2002) describes a fashion city as a place endowed with a 'flexible' manufacturing basis, highly skilled specialists, training and research institutes, international promotional systems, evolving place-based fashion traditions, and strong links between fashion and other cultural industries. Hethorn (2005, p. 241) defines the 'fashion city' as a 'place where style, power, identity, consumption and production practices, symbols and myths converge within a space inhabited by people and ideas in addition to fashion products and processes' (Hethorn, 2005, p. 241). More recently, Godart (2014) suggests that a fashion capital can be defined through

the existence of fashion weeks, which are covered by global media and allow cities to achieve a central place in the global structure of fashion. In sum, existing research on the topic is huge, extremely vague, and not focused on a common and clear theoretical ground that is extremely important to a real understanding of the phenomenon.

Drawing upon a review and systematic organization of the academic literature, the next part of the chapter analyses the fashion city idea through a creative approach that focuses on the designer fashion industry as a CCI and on fashion designers as a creative class. To do this, causes, factors, and conditions that have affected the concentration of the designer fashion industry and of the creative class of fashion designers in cities are broadly explored and investigated. Such an analysis will result in the construction of a theoretical framework focusing on the idea of the 'creative fashion city'.

1.7. The urban clustering of the designer fashion industry

A multiplicity of studies from different research fields have shed light on the significance of agglomerations in clusters or districts to the development of cultural and creative industries (Costa, 2008; Lazzeretti et al., 2008). These industries tend to show extreme levels of spatial clustering particularly due to intense competitive pressures (Scott, 2004; Wenting et al., 2011). The specific forms of agglomeration economies, which are originally associated with traditional manufacturing industries and include a close proximity to interrelated specialised firms, skilled workers, resources, infrastructures and research institutes for the generation of economies of scale, can be applied also to CCIs. However, local knowledge spillovers, cross-fertilization of ideas, learning processes, energies, social meanings, buzz and face-to-face interactions have become particularly significant in the context of CCIs as a means of coordinating the economy (Power and Scott, 2008; D'Ovidio, 2010). In this sense, creative clusters draw upon a self-reinforcing mechanism of growth, where trust is nurtured in local communities to foster interaction, collaboration, and knowledge exchange, which are crucial elements for this type of industries.

The intense debate on the contribution of CCIs to local economic development has largely focused on the highly agglomerated nature of the designer fashion industry, and on the significance of its localization economies and co-localised industrial systems. Firstly, these industries have the tendency to agglomerate for gaining productive efficiencies, according to clustering qualities similar to those of the 'Marshallian industrial district' (Scott, 1996). They

are usually characterised by a production network that includes many small- and medium-sized firms, together with few large-sized establishments that function as hubs in the production network (Scott, 1996, 2000a, 2004; Power and Scott, 2004). A vast array of studies has identified creative inspiration, product and process innovation, cross-fertilization of ideas, knowledge and learning as the main factors driving the spatial clustering of these industries. Inter-firms and actors' linkages, face-to-face interactions, open exchange of information and local social ties can be regarded as further elements that contribute to these specific agglomeration economies (Scott, 1996; 2000; 2010; Power and Scott, 2004; Rantisi, 2004a, 2004b; Gilbert, 2006; Currid, 2007a; Hauge, 2007; Aage and Belussi, 2008; Hauge et al., 2009; D'Ovidio, 2010; Jansson and Power, 2010; Knox, 2011).

Physical proximity allows these firms to benefit from 'vertical relationships' with buyers, suppliers, clients and support services, which are necessary for maintaining an innovative industrial cluster. Moreover, they benefit from 'horizontal relationships' with main competitors, which serve for observing, monitoring and evaluating alternative and innovative practices, as well as new designs and solutions. Such physical proximity contributes to the promotion of shared conventions and standardised business practices that are capable of making the agglomerated firms more efficient (Rantisi, 2002; Hauge, 2007; Knox, 2011).

Moreover, they work in close proximity to locally embedded social and cultural resources (Rieple et al., 2015). The concentration of resources, knowledge and capabilities of related firms in a specific place encourages the process of innovation and learning, as well as knowledge sharing, cross-fertilization of ideas and face-to-face interactions (Hauge et al., 2009). Designer fashion products are mostly valued for their aesthetic and symbolic attributes, which are formed in time- and space-sensitive knowledge communities and changing environments with high levels of uncertainty and competition. As a consequence, constant innovation, novelty, recognition and differentiation are essential strategic resources to the success of these industries, which strongly benefit from being part of a 'local buzz', where it is possible to interact with people and share significant knowledge and information (Scott, 2002; Power and Scott, 2004; Rantisi, 2004b; Storper and Venables, 2004). Thus, also the cognitive proximity becomes significant to support a negotiated process of knowledge creation among multiple actors and to foster a process of variation based on the observation of competitors' products and processes, as well as new trends, development paths and techniques (Aage and Belussi, 2008; D'Ovidio, 2010; Jansson and Power, 2010).

The nature of aesthetic and symbolic production, which benefits from physical and cognitive proximity, contributes to anchoring cultural and creative industries to cities. These industries take advantage of both agglomeration and urbanization economies. More specifically, being characterized by changing environments, tacit knowledge and high levels of uncertainty, they have the tendency to agglomerate in urban quarters mainly because of an easy access to suppliers, specialised service providers, skilled labour force and institutional infrastructures. However, the proximity to ideas, innovative resources, and energies of other creative industries, individuals, and institutions functions as a further significant driver for urban agglomeration of CCIs (Scott, 1997, 2000). In fact, cities, which are defined as sites of knowledge and cultural production with dense human relationships and interchanges, are able to generate important interactions among institutions, firms, and knowledge workers. In particular, they contribute to producing ideas, creativity, and culture, and to encouraging the exchange of information and the transmission of complex tacit knowledge (Scott, 2000; Vicari, 2010). In this respect, Scott (2000; 2002; 2010) claims that the complex clustering of these industries leads to transform the 'cluster' into a 'creative field', where innovative energies, interpersonal relations and informal information exchanges among people in urban settings contribute to spurring innovation, creativity and knowledge.

'The concentration of creativity leads to greater chances of more creativity happening. The greater number of creative people lends itself to great possibilities for new innovations, artistic collaborations, and possibilities of discovery of new types of music, fashion, and art' (Currid, 2007b, p. 91). In addition, variety and diversity of people, social and economic activities are defined as important drivers for fostering creativity and novelty and, thus, for encouraging urban agglomeration of CCIs. The former requires clustering, whereas the latter necessitates urban clustering (Rantisi 2004a; Lazzeretti et al., 2008; Lazzeretti, 2009). The agglomeration of these industries in cities, in turn, attracts new firms to creative production sites. According to Scott (1997; 2000) creative industries tend to flourish where there are agglomerations of competitive and interdependent firms, which are capable of exploiting the cultural capital of cities and are supported by local policy initiatives. Moreover, these firms tend to concentrate within metropolitan areas and large cosmopolitan places, particularly in world cities like London, New York, Los Angeles, where strong creative networks and extensive institutional infrastructures can stimulate the emergence of design-based ideas and generate 'self-reinforcing spirals of endogenous growth' (Scott, 1996; 2001; Weller, 2014, p. 723). However, more recent research has claimed that CCIs can also flourish in less central

centres though facing overwhelming challenges to survive and grow (Rantisi and Leslie, 2006; Larner *et al.*, 2007; Melchior, 2011; Skov, 2011).

By the same token, the designer fashion industry is highly rooted in space and shows patterns of concentration in cities, notably within specialised clusters of production. In fact, it benefits from urbanization economies, which are defined as scale effects associated with the size of urban environments (Scott, 2000; 2010; Rantisi, 2004b; Santagata, 2004; Currid, 2007a; Hauge, 2007; Lazzeretti et al., 2008, 2009; D'Ovidio, 2010). Designer fashion firms are usually located in fashion districts with easy access to manufacture, fashion design, high-skilled workers and a broad range of related support services such as suppliers, wholesalers, retailers and training institutions, or in central urban quarters with creative and artistic atmosphere, a broad range of cultural activities and high quality of the environment (Williams and Currid-Halkett, 2011).

Thus, this industry tends to be located in cities not only where concentrations of support institutions, specialised services, and skilled professionals support these firms, but also where local fashion culture and aesthetic sensibilities, which cannot be easily replicated elsewhere, are generated over time (Leslie and Rantisi, 2009). Cultural agglomerations have a distinctive atmosphere, which derives from a specific local culture, clustering of cultural activities, as well as local taste systems (Rantisi, 2004b). The clustering of the industry in urban quarters reflects also the significant role of face-to-face interactions between organizations, institutions, and individuals. In this respect, according to Storper and Venable (2004, p. 351), 'face-to-face contact remains central to coordination of the economy, despite the remarkable reductions in transport costs and the astonishing rise in the complexity and variety of information-verbal, visual and symbolic-which can be communicated nearly instantly'.

Fashion knowledge has been defined as highly 'territorial specific' (Weller, 2006, p. 42). In particular, the history of fashion has seen a hierarchy of central places where creativity, tacit knowledge, and information have been generated and exchanged over time (Hauge et al., 2009). The agglomeration of these firms in limited urban space strongly contributes to enhancing the value of fashion design, which becomes powerfully associated with these cities in the form of place-based associations (Arrigo, 2011). Moreover, as previously underlined, phenomena of globalization have contributed to the concentration of design-based industries in large urban centres, particularly in the fashion's world cities. According to Wenting (2008), the agglomeration of a few successful designer fashion firms in specialised clusters generates local spinoff dynamics through the imitation of routines and organizational capabilities, and

further contributes to the spatial clustering of the industry in major cities of fashion like New York, Milan and London.

The Garment District of New York (now re-branded as 'Fashion Centre') represents an exemplary case of a highly localised industrial hub in the designer fashion industry. Such district hosts a dense concentration of manufacturing and designer fashion industry establishments and its central location demonstrates the importance of proximity to a series of attractive cultural activities (e.g., retail districts, museums, nightclubs) (Rantisi, 2006). The strongest concentration of designer fashion houses in Milan is located in the historical centre, in the so-called 'Quadrilatero della Moda'. It hosts flagship stores and showrooms of internationally renowned fashion brands contributing to generating a strong association between fashion and the city. The remaining Milanese designer fashion houses are concentrated in a secondary fashionable quarter called 'I Navigli', which has attracted an increasing number of specialised firms thanks to the presence of support activities (e.g., PR, advertising agencies), low-cost of real estate and the establishment of some important designer fashion houses (e.g., Prada).

In London, the designer fashion industry tends to concentrate in the Northern part of the city centre and in specific clusters that provide spaces for building relationships and promoting face-to-face interactions among designers. For example, Oxford Street and the area of Knightsbridge are internationally acknowledged fashion districts, notably for the presence of luxury department stores and the London Fashion Week's event. In turn, they attract numerous designer fashion firms that wish to benefit from the presence of related industries and the cultural capital attached to these places. In addition, other designer fashion firms are located in the Notting Hill area, where there is an agglomeration of renowned firms (e.g., Stella McCartney) that take advantage of the creative atmosphere of the Portobello Market. Other companies are concentrated in the area of Brick Lane for the highly artistic atmosphere and cheap housing, or in the area of Clerkenwell for being part of a more traditional industrial area (D'Ovidio, 2010; Pandolfi, 2015).

1.7.1. Interdependence between the designer fashion industry, CCIs and art in cities

Extensive research has analysed how the presence of multiple CCIs in the same urban environment functions as a significant driver for inter-sectorial knowledge spillovers, innovative interactions, and positive externalities across different creative sectors. In this

regard, Currid (2007b, p. 7) states: 'when we think of art and culture, we often think of film and fashion or art or design but often as separate entities. And while they do cultivate their own following, discipline, and norms, they are also part of a far more encompassing and symbiotic whole than we generally consider them. These separate industries operate within a fluid economy that allows creative industries to collaborate with one other, review each other's products, and offer jobs that cross-fertilize and share skill sets, whether it is an artist who becomes a creative director for a fashion house or a graffiti artist who works for an advertising agency'.

In a similar vein, a number of studies have applied the concept of related variety, which is regarded as the presence of related industrial sectors in terms of shared or complementary competences, to creative industries (Lazzeretti, 2009; Lazzeretti et al., 2009). In this regard, the designer fashion industry seems to profit from being located in cities with 'related variety', where there exists a relationship among effective and potential industrial sectors and economic activities in terms of innovation, competences and creativity, which is capable of stimulating knowledge spillovers and regional economic growth (Frenken et al., 2007; Wenting et al., 2011). In particular, the designer fashion industry has been identified as highly dependent on other CCIs such as music, photography, media, arts, entertainment, performing arts, film, television, communications and advertisement, as well as on other crossover industries like tourism, events, heritage industries, public relations and exhibitions (Scott; 1996; Rantisi, 2004b; Storper and Venables, 2004; Gilbert, 2006; Merlo and Polese, 2006; Storper and Scott, 2009; Knox, 2011; Wenting et al., 2011; Williams and Currid-Halkett, 2011; Tokatli, 2012b; Hracs et al., 2013).

According to Wenting et al. (2011), the high concentration of designer fashion industries in Amsterdam has been significantly affected by the presence of other related industries, particularly advertising, photography, and media. Huang et al. (2016) analysed how the designer fashion industry in Taiwan acts as an important fountainhead of creative talent for media, entertainment, and advertising industries. Likewise, in Toronto, a high concentration of creative industries (i.e., film, theatre, dance, food, art, architecture, interior design, music) strongly contributes to retaining fashion designers in the city. In particular, the proximity of related creative industries creates opportunities for cross-fertilization and learning experience between and within these sectors, through the exploitation of intense urbanization economies (Florida, 2002; Leslie and Brail, 2011).

Stockholm represents a further interesting example of cross-fertilization between designer fashion and other CCIs, notably music, film, and media, which strongly encourage the vitality and development of the sector (Hauge and Hracs, 2010; Leslie and Brail, 2011; Leslie at al., 2014). In particular, the recent success of the Swedish pop music has been regarded as one of the most important engines of the local designer fashion industry's growth (Hauge et al., 2009). In this regard, the relationship between the industries of fashion design and music can produce significant synergies, which enhance the symbolic value of these cultural products and become a crucial competitive strategy for independent producers in the contemporary landscape (Hauge and Hracs, 2010). Also, in Berlin there are strong interdependencies between fashion design and music in urban creative economies, and designer fashion firms benefit from numerous tourists who are attracted to the city for its vibrant music scene (McRobbie, 2013). Moreover, powerful interdependencies between fashion design and pop music industry seem to enrich also the urban creative economy of Taipei (Hu and Chen, 2014).

In addition, over time, media and entertainment industries have strongly contributed to the formation of the designer fashion sector. In this respect, the rising emphasis of Los Angeles as a significant fashion hub has been heavily affected by the success of the local entertainment agglomeration of Hollywood (Scott, 1996). Designer fashion firms can draw upon the natural monopoly power stemming from Hollywood and thus benefit from the proximity to celebrities, media, and events that, in turn, attract other fashion designers to the city (Molotch, 1996; Williams and Currid-Halkett, 2011; Tokatli, 2012b). Besides, a strong synergy between fashion design and entertainment industries led Rome, in the 1960s, to achieve the status of Italian fashion capital after the dominance of Florence. In this period, which was characterised by Cinecittà studios and the 'Hollywood on the Tiber', haute couture ateliers became famous for dressing American actors and actresses, who populated the local movie sets. On the same vein, at the beginning of the twentieth century, many Italian fashion designers, such as the shoemaker Salvatore Ferragamo (1898-1960), gained popularity thanks to powerful connections to the American film industry (Merlo and Polese, 2006).

Of particular interest are the interdependencies and interconnections between fashion design and art. In the course of the history, fashion and art have established a symbiotic, mutually beneficial, and complex relationship, where 'each discipline simultaneously inspires, encourages and competes with the other' (Duggan, 2001, p. 243). Powerful reciprocal influences exist within a creative world where various artists work across different disciplines of creativity. On the one hand, fashion design tends to define itself as a form of art, for

example through the adoption of behaviour models of art (e.g., production of a limited range of items). More specifically, in order to make fashion culturally distinctive, fashion designers draw upon art, particularly in terms of designing collections and work processes, as in the case of the Deconstructionism movement adopted by Belgian fashion designers (Skov, 2011). In this respect, at the end of the nineteenth century, Parisian haute couture was strongly inspired by art with the aim of defining itself as a cultural activity rather than as a mere sartorial practice. On the other hand, art tends to its commodification drawing upon habits stemming from the world of fashion, which functions also as an important source of inspiration (Duggan, 2001; Taylor, 2005; Pedroni and Volonté, 2014).

An increasing number of collaborations between fashion designers and artists confirm the growing importance of such relationship (Pedroni and Volonté, 2014). In London, the strong connection between fashion and art contributes to generating a highly vibrant creative field, where fashion designers are part of localised artistic communities through important creative work exchanges and collaborations (D'Ovidio, 2010). The inclusion of fashion design within colleges of arts, which is widespread in London, is a further proof of the powerful synergy between these two creative fields. In addition, in recent years, fashion design has become growingly placed outside its traditional commercial context and within the context of museums and art galleries. In this regard, specific cultural policies have strengthened the cross-fertilization between fashion and art thanks to the creation of places dedicated to innovation and creativity (Taylor, 2005; D'Ovidio, 2010).

As a result, in recent years, more and more designer fashion houses have sponsored or invested in art galleries, exhibitions and biennials (Duggan, 2001; D'Ovidio, 2010). For example, in 2001, Prada turned its Fondazione Prada into a cultural organization including a vast array of creative fields such as architecture, design, and cinema with a large symbolic and economic impact in the cityscape. The main aim was to be identified as 'patron of arts with a multidisciplinary cultural mission' (Tokatli, 2014, p. 5). Additionally, designer fashion houses have variously used artistic venues for showing their collections, as in the case of the Salvatore Ferragamo's fashion show at the Louvre museum in Paris. In particular, cities of art like Florence have become favourite locations for fashion events (Sedita and Paiola, 2009).

In such context, museums have attained increasing interest from the perspective of the economics of creativity. In particular, they have been regarded as creative places aimed at producing and disseminating knowledge and as strategic resources for communicating local cultural identities and contributing to local development (Santagata et al., 2009; Lazzeretti

and Capone, 2013). At worldwide level there is an increasing number of museums explicitly dedicated to fashion, together with national museums of arts with temporary and permanent fashion-related thematic areas. These museums usually feature the history, characteristics, and significance of fashion and textiles cultures in specific local areas (Santagata et al., 2009). In this regard, museums have been considered important means of sustaining the designer fashion industry, notably through the display of the creations of fashion designers in the form of temporary retrospective exhibitions (e.g., Giorgio Armani exhibition at the Guggenheim museum of New York in 2000). In fact, these exhibitions contribute to elevating the status of fashion designers to those of artists (Taylor, 2005; Santagata et al., 2009; Pedroni and Volonté, 2014).

1.8. The 'creative class' of fashion designers

The growing convergence between culture and economy and the rising importance of symbolism as a fundamental strategy in the late capitalism have raised the fundamental question of what enhances the competitive advantage of creative cities and contributes to developing and strengthening cultural and creative industries. In an attempt to answer this question, extensive research has highlighted the significant role played by creative and talented individuals. The designer fashion industry is supported by a network of fashion designers, who are defined as highly creative individuals and 'producers of cultural goods'. In particular, they play a significant role in the production and dissemination of creativity (Kawamura, 2005; Huang et al., 2016). Moreover, they tend to create strong local networks in urban environments and to produce an intangible cultural milieu, which is extremely important for contemporary economic development (Williams and Currid-Halkett, 2011; Pratt et al., 2012; Hu and Chen, 2014).

Florida (2002) identifies the size of the creative class as one of the main indicators for the creative potential of cities. In a similar vein, Santagata (2004) contends that the presence of acknowledged fashion designers 'in a given place at a given time' is an important indicator for a highly creative environment. In this framework, fashion design is defined as a creativity-based idiosyncratic good and, like culture and creativity, is profoundly rooted in time and space. It is strongly characterised by the succession of various generations of fashion designers with their own distinctive and creative identity, which is endowed with powerful associations with the territory. Historically, fashion designers have concentrated in 'well-defined places and periods', through the emergence of 'creative waves' that have led to the

invention of new styles, forms and original aesthetics.

For example, in the 1980s, a group of innovative and controversial fashion designers, the so-called 'Big Three' (i.e., Issey Miyake, Yohji Yamamoto and Rei Kawakubo of Comme des Garçons) led to the emergence of Japanese fashion and contributed to making Tokyo an internationally renowned fashion city. More specifically, they have introduced highly creative and unconventional clothes based on a combination of Japanese and Western elements. These creative designers have been celebrated as the greatest innovators in international fashion and have proposed a new conception of aesthetics, which has originated from culturally distinctive local styles such as the youth subcultures of teenagers (Kawamura, 2006; Skov, 2011). Likewise, the extremely creative, original, and open-minded Belgian designers, who have been labelled the 'Antwerp Six', have supported the development of Belgian fashion drawing the attention of media and buyers from all over the world. In particular, they have introduced a new approach to dressmaking based on a deconstructionist approach borrowed from art (Beard, 2011; Skov, 2011; Teunissen, 2011).

A creative wave can be associated not only with the concentration of fashion designers in time and space, but also with the creation of new products, processes and business models, such as the invention of the haute couture/prêt-à-porter combination or the organizational flexibility of the industrial district (Santagata, 2004). In this regard, during the 1950s and 1960s, numerous globally acclaimed fashion designers (e.g., Christian Dior, Karl Lagerfeld, Pierre Cardin, Yves Saint Laurent) emerged in Paris, leading to the merger of haute couture with prêt-à-porter. Another interesting example is Milan, whose success as a major fashion city was originally based on the business model of the 'entrepreneur-designer', which was associated with the emergence in the 1970s and 1980s of internationally successful fashion designers, notably Giorgio Armani and Gianfranco Ferré. Although this business model has been thoroughly affected by globalization of clothing production, it continues to be an essential cultural resource for new generations of Milanese creative fashion designers (Skov, 2011).

1.8.1. Factors and conditions affecting the flow of fashion designers to cities

Nowadays, fashion is part of a process of cultural globalization, which is characterised by high mobility of goods, commodities and people, in addition to the dissolution of old economic structures and boundaries. The diffusion of the ICTs and the dematerialization of

business activities, together with reduced barriers to immigration and emigration, have led to an increasing internationalization of fashion designers, who tend to move between various fashion systems in the world in order to fulfil their professional ambitions (Santagata, 2004; Huang, 2016). Historically, immigration has long contributed to the formation of traditional cities of fashion, notably London, New York and Los Angeles, where movements of people from all over the world have played a fundamental role in defining metropolitan fashion cultures. In the designer fashion industry, labour mobility is highly important as it encourages the creation and transfer of knowledge. Moreover, it generates a wave of mobile creative talent capable of performing better thanks to work experience gained in different world urban environments (Wenting, 2008).

As already discussed in previous sections, the growing significance of creative talent in driving economic growth has led to shift the focus from creative industries to human capital and its creative habitat. This has created new opportunities and challenges for planners, policy-makers, and economic developers (Florida, 2002; Currid, 2007b; Lazzeretti et al., 2008; 2009). In particular, attracting, nurturing, and retaining fashion designers has been included within a growing number of cultural and creativity-oriented urban policies. In this respect, a number of studies have addressed and analysed the locational behaviour of fashion designers, together with the causes, factors and conditions that have affected this specific talent flow over time (Wenting et al., 2011; Hu and Chen, 2014). Firstly, as observed when addressing the clustering of the designer fashion industry in cities, agglomeration economies play a significant role in driving fashion designers towards specific urban contexts. For instance, Williams and Currid-Halkett (2011) show how fashion designers in New York and Los Angeles tend to cluster in specific urban fashion districts (i.e., Garment District of New York and Fashion District of Los Angeles), mainly due to the combined presence of manufacturing, design, and a vibrant neighbourhood that is endowed with restaurants, clubs and retail districts. Nowadays, the presence of traditional craft skills and the opportunity to collaborate with artisans have become important factors for attracting fashion designers who want to focus on artisanship as a strategy to enhance the value of their products. As an example, recently, several fashion designers, such as the founder of 'Aquazzurra' Edgardo Osorio, have chosen Florence as location for their headquarters in order to benefit from the proximity with an internationally renowned local artisanal workforce (Lazzeretti et al., 2017).

In addition to agglomeration economies, attractive urban amenities function as significant drivers for spatial clustering of CCIs and creative talent. A tolerant social atmosphere, ethnic

diversity, and a broad range of cultural activities have been regarded as fundamental elements for attracting high levels of human capital (Florida, 2002; Wenting et al., 2011). In this sense, besides the presence of a local fashion milieu with a network of businesses and highly skilled workers, Hu and Chen (2014) identify lifestyle, spirit of place, and environmental quality of the district as significant drivers for attracting fashion professional to Taipei. Economic and industrial transformations, spatial cost fluctuations, and entrepreneurship policies in support of local organizations have been identified as important factors. In this regard, as an example, the gradual transformation of the economic structure of London's fashion industry from manufacturing- to design-oriented has attracted a growing number of fashion designers wishing to connect themselves to the global fashion market. Moreover, in Berlin, in the 1990s, the possibility of renting cheap and large spaces has drawn the attention of numerous creative talented individuals and fashion designers, who have increasingly converged in the city (Hu and Chen, 2014).

The establishment of local department stores, notably through specific operating policies such as funding and advertisement activities, has also heavily affected the flow of creative fashion professionals to Taipei (Hu and Chen, 2014). Overall, forms of local consumption and the presence of powerful retail districts, together with high levels of purchasing power as well as the presence of an affluent and sophisticated clientele, play an important role in the attraction of fashion designers to cities. In fact, places and spaces where products are sold strongly contribute to the creation of brand identity, which is particularly important for fashion designers at the beginning of their career (Wang and Sun, 2013). As an example, the flow of creative fashion talent towards New York has been affected by the acknowledgment of the city as a major fashion capital and as a world cultural tastemaker. Thus, designers who concentrate in this city want to be associated with the prestigious image of this urban fashion formation (Currid, 2007a). Moreover, cities that strongly focus on fashion consumption, as in the case of the fashion's world cities, help emerging fashion designers to achieve first recognition in the industry. In fact, retailers play an important role in supporting local fashion designers by showcasing their collections, as well as by collaborating with other fashion-related institutions in the promotion of new domestic brands. For instance, London high-street retailers have strongly supported local fashion designers not only providing them with space to show fashion collections, but also through the promotion of local showcase events as well as of specific talent pathway schemes dedicated to emerging fashion designers (Oxford Economics, 2010).

Leslie and Brail (2011) explore how a second-tier city of fashion, which usually lacks an international reputation in fashion design, may be able to attract and retain creative talent to the urban area. To achieve this objective, they draw upon the city of Toronto as unit of analysis. According to these scholars, employment opportunities associated with the presence of a sizeable designer fashion industry[10] with a long tradition in fashion and textiles, together with other cultural industries and educational institutions, are of central importance in attracting creative talent to Toronto. Furthermore, they highlight the significance of quality of place in retaining fashion designers to cities. In this respect, cultural diversity, which is measured in terms of foreign-born population, may function as a source of inspiration for fashion designers and foster their creativity through a huge variety of people with different capabilities. Also, tolerance (i.e., the presence of a gay population), economic diversity (i.e., presence of multiple cultural industries), and liveability (i.e., small size of the city that makes easier to build social networks) contribute to drawing designers to cities.

Significant aspects of sociality reinforce these agglomerative tendencies. 'Place matters because the social networks are grounded in particular places where culture is produced and consumed' (Currid 2007b, p. 79). Fashion designers are strongly attracted by the presence of a 'social milieu', where they can cultivate frequent face-to-face interactions with other creative workers, have access to key 'gatekeepers', obtain media attention and create 'buzz' that generates high symbolic and economic value for their products (Currid, 2007a; D'Ovidio, 2010; Williams and Currid-Halkett, 2011).

For instance, Amsterdam has a high degree of agglomeration of Dutch fashion designers and its cluster attracts approximately 25% of total Dutch graduates in fashion design. This is affected by a series of personal valuations on urban amenities, which are endowed with a high cultural atmosphere, the reputation of the city as the Dutch fashion capital and the possibility of collaborating with designers within and outside the cluster (Pandolfi, 2015). However, the importance of gaining experience and building networks has been one of the main factors, which have led young fashion designers to concentrate in the city. In turn, the high level of fashion designers' agglomeration has attracted new entrants, who have made the cluster more attractive to future designers, through a self-reinforcing mechanism based on the city's reputation (Wenting et al. 2011).

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[10] Toronto is the second largest centre of fashion manufacturing in Canada. It includes more than 550 apparel manufacturers, 25,000 employees, and a location quotient in the garment industry of 1.96, which shows a high degree of specialization (Leslie and Breil, 2011).

D'Ovidio (2010), in a study addressing the various interactions among fashion designers in London and Milan, explains why social relations are so important to fashion designers. Firstly, they allow designers to acquire information, visibility, and recognition, as well as building trust and developing important collaborations in the industry. These activities are highly fundamental due to nature of the fashion design work, which involves tacit knowledge and is based on sensibility and lifestyle. In particular, social interactions among fashion designers in Milan generate the so-called system the 'loop', which is regarded as informal networks particularly significant for creative activities where face-to-face interactions create the perfect ground for promoting innovation (Storper and Venables, 2004). This virtuous circle of recognition is aimed at building trust, fostering the exchange of information and promoting the acknowledgment of creative talent (Pratt et al., 2012). Trust is particularly important for the formation of local creative communities of cultural workers, who share knowledge, skills, sensibility, and aesthetic values. Moreover, such communities are mutually interested in maintaining social contacts, reputation, and cultural capital in the network, where ideas and trends can easily emerge.

These relations contribute also to the promotion of creativity and innovation, particularly through an intense creative exchange, mutual recognition, and support between multiple creative producers such as designers, architects and artists. 'And when one engineer or designer meets with another to talk about how a new computer's design will fit with the hardware inside, or whether a particular fabric will work with a designer's spring collection, chances are they exchange a lot of ideas even ideas not necessarily directly related to the task at hand, from the names of other pattern makers to what is going on in Milan's fashion industry. That exchange of knowledge ended up translating into new ideas and product innovations' (Currid, 2007b, p. 71).

To give an example, social relations among London-based designers have a highly creative nature and act as an important means of stimulating creativity. Moreover, these designers are part of localised artistic communities and have developed stable collaborations and creative work exchanges with artists (D'Ovidio, 2010; Pratt et al., 2012). Equally, Molotch (2002), in a research work on the design industry, highlights how designing and the creative process intensively draw upon geographical proximity, which increases the opportunity for face-to-face interactions among designers and other creative communities and, in turn, enhances creativity. According to Tokatli (2011), fashion designers together with painters, actors, musicians, and other creative people are entitled to freely move in the knowledge, creativity,

and ability of each other's field. In this respect, Aage and Belussi (2011) define fashion design as 'an open-source model of the collective creativity of taste'. More specifically, they suggest that actors engaged in the production of fashion are part of networks of creativity, which are developed through the combination of internal and external competences of various fashion designers.

In addition, the social milieu is dynamic and tends to move to different locations, involving different people at different points (Currid and Williams, 2010). In this sense, Florida (2002) stresses the significance of the so-called 'third places', which are regarded as venues like restaurants, bookstores, nightclubs, and coffee shops that provide opportunities for informal social interactions among creative people (e.g., writers, actors, designers, architects) and a network of industries, editors, magazines, public relations and celebrities (Currid 2007b). In this sense, social venues are a source of significant opportunities for collaborations among creative people with similar interests, who may exchange tacit knowledge and have access to significant gatekeepers (Rieple et al., 2015).

Events like exhibitions, trade fairs, catwalk shows, gallery openings and industry parties have been regarded as fundamental means of providing informal networking opportunities, as well as of building and reinforcing relationships for fashion designers (D'Ovidio, 2010; Knox, 2011). In particular, fashion shows are able to mobilise international flows of fashion-related actors. They serve as important elements for connecting global and local networks and for fostering the establishment of relationships and the exchange of tacit information, which are both essential activities in cultural production. The bi-annual fashion weeks in fashion's world cities function as temporary clusters, where it is possible to interact with people, build network and exchange knowledge (Rieple et al., 2015). Equally, trade fairs are central points for networking, as well as for tacit knowledge creation and dissemination among actors in a growingly geographically dispersed fashion industry (Arrigo, 2011; Pratt et al., 2012).

1.8.2. The role of cities in the material and symbolic production of fashion design

From a wider perspective, fashion design can be defined as a collective process where many different and interwoven cultural intermediaries or gatekeepers (Kawamura, 2005; Hauge, 2006), which tend to concentrate in urban settings, assist fashion designers in producing fashion and contribute to shaping the complex and fragmented designer fashion industry (Kawamura, 2005; Tokatli, 2011; Williams and Currid-Halkett, 2011; Pratt et al., 2012). In

70

particular, 'gatekeepers' function as significant intermediaries between producers and consumers and play a role in selecting and promoting cultural production and consumption. Fashion magazines, critics, advertisers, forecasters, magazine editors, stylists, fashion buyers, retailers, shop designers, PR agents, fashion weeks, fashion fairs, in addition to new forms of communication (e.g., fashion bloggers, new social networking websites), are some of the most important intermediaries capable of shaping the designer fashion industry. In addition, particularly for de-industrialised countries, cities governments, fashion design schools, shopping districts, CCIs, and cultural institutions like museums have become significant drivers for developing fashion design in cities (Skov, 2011).

Fashion can be also regarded as an interpretative system, which draws high levels of inspiration from various elements that are deeply rooted in cities such as forms of arts, cinema, and theatre. In this sense, places, and more specifically cities, are highly significant to fashion designers. In fact, they represent an important source of stimuli and inspiration, as well as a means of fostering innovation and creativity (Leslie and Brail, 2011). Cities can provide designers with 'a resource of prompts, ideas, signs, or raw materials that can act as a catalyst during the process of design' (Drake, 2003, p. 511). Therefore, the city plays a key role in the symbolic and material work of fashion designers, thus defining the social and economic parameters of creativity. The urban environment gives meaning and value to fashion products, ensures the translation of aesthetic innovations into commercially viable goods, and promotes young and emerging fashion designers by enriching the creative environment of the city (Rantisi, 2004b; Pratt *et al.*, 2012). In this respect, according to Rantisi (2004b), who proposes an analysis of the relationship between New York and the local designer fashion industry, the city seems to assist fashion designers in the process of producing symbolic and material fashion, functioning both as a source of 'art' and 'commerce'.

On the one hand, cities are endowed with elements that function as sources of inspiration for the design concept. Among these, there are 'place-specific' cultural institutions, which are classifiable in 'complementary' cultural institutions (e.g., architecture, art galleries, opera, theatre, local consumers) and 'fashion-related' cultural institutions (e.g., New York retail market, bi-annual fashion week) (Rantisi, 2004b). As far the creative process is concerned, fashion designers usually introduce incremental innovations through the recombination of elements borrowed from existing designs into the development of new original products (Rantisi and Leslie, 2006; Aage and Belussi, 2008). Numerous cities, including Berlin, New York, Toronto, and Stockholm, have been important sources of inspiration for local fashion

designers, who have also drawn upon the creation of symbolic connections with these cities, with the aim of giving distinctiveness to their cultural products (Hracs et al., 2013).

By the same token, fashion designers have long been inspired by architecture for the conception of design (Rantisi and Leslie, 2006). In particular, the complex relationship between architecture and fashion has contributed to the perception of the centrality of specific cities (Gilbert, 2006). The majesty of costumes associated with the theatrical production in New York has been a significant source of inspiration for local fashion designers (Rantisi, 2004b). The variety of architecture, art galleries, museums, people in the streets and open-air markets (e.g., Portobello market) has strongly enhanced creativity in the designing of garments (D'Ovidio, 2010). Moreover, distinctive shopping districts (e.g., Fifth Avenue, Madison Avenue) that are part of the New York retail market, in addition to the bi-annual New York Fashion week, have offered the opportunity to observe the creations of competitors and, in turn, to generate important stimuli for fashion designers (Rantisi, 2004b).

On the other hand, cities assist fashion designers in the physical production of fashion and in translating the designer's vision into a tradable commodity. More specifically, cultural institutions contribute to the materialization (e.g., fashion design schools, forecasting services, trade publications) and commercialization of fashion (e.g., fashion shows, fashion magazines, key trade publications, trade shows, buying offices). Fashion design schools (e.g., Fashion Institute of Technology, Parsons School of Design) help designers perceive the city as a source of creative inspiration, as well as facilitating their transition to the marketplace. Additionally, forecasting services and trade journals (e.g., Women's Wear Daily) support the transformation of the design into a material object. In particular, they provide designers with market information, the best practices in the industry and newest trends related to design elements. Moreover, fashion shows and fashion magazines, together with key trade publications, trade shows, and buying offices support fashion designers in the final commercialization of their products.

1.8.3. Function and nature of the fashion education system

The education system has been regarded as an important means of urban development, growth, and regeneration, and has played a rising fundamental role in the broader fashion industry. Nowadays, due to its symbolic reputation, it can be regarded as an important magnet and generator of highly creative and talented individuals, which has contributed to economic

growth in the cultural economy (Currid, 2007b). The education system provides skills that 'enable students to become productive and competitive members of the cultural economy' (Currid, 2007b, p. 170). In particular, according to Tokatli (2011), the aim of fashion design schools is to 'become cultural barometers reflecting contemporary life'.

Over time, educational institutions have played an important role in the formation of several fashion cities, notably functioning as means of attracting the creative class of fashion designers, as well as for building the reputation and image of fashion centres. To give an example, the establishment of prestigious specialist educational institutions (i.e., 'Pratt Institute' in 1888, 'Parsons School of Design' in 1897, 'Fashion Institute of Technology F.I.T.' in 1944) strongly encouraged the image-building process of New York as a world fashion capital after World War II (Rantisi, 2002). More recently, the 'Flandern Fashion Institute', which was established in Antwerp in 1998, was committed not only to the support of the local designer fashion cluster, but also to the promotion of the image of Antwerp as a renowned fashion city (Melchior et al., 2011).

Although the most common and traditional method for generating and transmitting creativity is 'learning by doing', academic formation and professional training in fashion design are also very significant to this purpose (Santagata et al., 2009). The designer fashion industry draws upon symbolic knowledge, which is endowed with a '*strong tacit component*' and is '*incorporated and transmitted in aesthetic symbols, images, designs, artefacts, sounds and narratives*' (Asheim et al., 2005, p. 8). As a result, higher educational institutions (HEIs) specialising in fashion design can be included within the category of 'applied' HEIs, which are based on symbolic knowledge and experience-based learning, rather than on analytical knowledge and formal education, as in the case of 'research-based' universities. These applied institutions act as powerful engines for stimulating creativity in CCIs like the designer fashion industry. This typology of knowledge requires high levels of interaction with professional communities and these schools tend to establish strong relationships with key local actors, in order to provide students with a real sense of the industry. In sum, they function as places where practical skills are provided, tacit knowledge is created and transferred ('know-how), and where valuable personal networks are built ('know-who') (Rantisi and Leslie, 2015).

By the same token, HEIs specialising in fashion design act as a significant link between design training, knowledge experimentation, and the industry, and as incubators of creative fashion talent available for local firms. Moreover, they act as key platforms for knowledge

production and social interaction, providing students with numerous opportunities for obtaining a good knowledge of the local industry reality, as well as for establishing relationships with media and other key actors in the network (e.g., buyers, magazines), particularly through internships, job placements, graduate showcase events, award ceremonies and so on (Rantisi, 2002; Harvey, 2011).

The dual character of the designer fashion industry, which is positioned in an intermediary position between the creative and material field, affects the nature of these HEIs. In fact, designers need to incorporate symbolic knowledge into highly commercial products and this operation requires the balancing of creativity and design identity with managerial and business skills, which are essential for running a sustainable business (Virani and Banks, 2014). Moreover, the form of education provided in these institutions is deeply rooted to the territory. A number of studies have stressed how fashion academies from different countries tend to offer diverse types of training, emphasizing to varying degrees a creative, technical or managerial approach to fashion, in a continuous tension between symbolic values and economic logics. More specifically, the type of fashion design training can be divided into 'conceptual fashion', 'professional fashion', and 'managerial fashion' (McRobbie, 1998; Volonté, 2012).

New York-based HEIs are primarily oriented towards preparing students to enter the industry. In addition to traditional courses in fashion design, they offer a huge range of other courses in management, marketing, and merchandising, as well as the opportunity to do internships in the local fashion industry (Rantisi, 2004b). Around 70% of fashion designers concentrated in the New York fashion district have been trained in local HEIs, such as the 'Parsons the New School of Design', 'Pratt Institute' and 'Fashion Institute of Technology' (Rantisi, 2002). Equally, Milanese HEIs specialising in fashion design organise courses in marketing, retailing, and management, and provide students with strong technical, craft, and manufacturing skills. In particular, the manufacturing experience is regarded as an essential feature of training and creativity, and these schools are strictly rooted to the territory and have strong relationships with local industry actors. The main objective of these schools is to encourage students to enter the local designer fashion industry and the extensive productive sector in both industry and craft (Volonté, 2010; Pedroni and Volonté, 2014).

Conversely, in London, courses in fashion design are mainly delivered within colleges of arts (e.g., Royal College of Art, University of the Arts, Westminster University) and are primarily aimed at teaching students how to use and express artistic creativity rather than to emphasize

technical and managerial skills. HEIs specialising in fashion design tend to neglect the commercial side of fashion and to enhance its artistic side, focusing on the 'culture of visibility' rather than on the 'culture of wear-ability' (McRobbie, 1998; Duggan, 2001; Volonté, 2010; Pedroni and Volonté, 2014). Likewise, Shi et al. (2012) show how Chinese students graduating from local schools, lack business, entrepreneurial and managerial skills and have a limited awareness of career choices after their studies. The city of Paris also hosts prestigious local schools that are specialised in fashion design such as the 'Studio Barçot', 'Institute Français de La Mode' and 'L'Ecole de la Chambre Syndacale de la Couture Parisienne', which emphasize more technical skills than creativity and managerial competences (Rocamora, 2009). However, the internationally renowned London- and New York-based HEIs function as the main incubators of French creative talent in the fashion design field (Tokatli, 2011).

1.9. Theoretical framework: The 'creative fashion city'

This section suggests a theoretical framework for the fashion city idea by adopting a 'creative approach', which primarily focuses on the designer fashion industry as a CCI and fashion designers as an example of the wider 'creative class'. The fashion city is presented as a particular model of the creative city paradigm. Such a framework directs attention to a particular kind of urban context, which has been termed as the 'creative fashion city'. The definition of this model emerges from the investigation of the causes, factors, and conditions that have affected the concentration of the designer fashion industry and of fashion designers in cities (Table 1.5). As a result of the analysis, the 'creative fashion city' can be defined as a local creative ecosystem centred on a designer fashion industry, cultural and creative industries, and a creative class of fashion designers, which are variously supported by a series of cultural actors, institutions and conditions in the creation, materialization and commercialization of fashion design.

Firstly, the designer fashion industry, as an example of CCI, shows strong patterns of concentration in cities. This industry tends to be located in urban centres where concentrations of support institutions, specialised services, institutional infrastructures, as well as creative and artistic atmosphere and a broad range of cultural activities sustain these firms. In particular, cities are able to generate important collaborations, notably in terms of face-to-face interactions, relationship building, and tacit knowledge exchange between designer fashion firms, workers, and institutions. More specifically, designer fashion firms are usually located

in specialised clusters of production or 'fashion districts', with easy access to manufacture, fashion design, high-skilled workers, and a broad range of related support services such as suppliers, retailers, and training institutions. Moreover, the agglomeration of these firms in urban centres contributes to enhancing the value of the designer fashion industry, which becomes symbolically associated with cities in the form of place-based associations.

The designer fashion industry has been identified as highly dependent on other CCIs such as music, photography, media, art, entertainment, performing arts, film, television, communications and advertisement, as well as on other crossover industries like tourism, events, heritage industries, public relations and exhibitions. The proximity of related creative industries creates opportunities for knowledge spillovers, cross-fertilization, innovative interactions, and learning experience between and within these sectors, through the exploitation of intense urbanization economies. Of particular interest is the cross-fertilization between the sectors of fashion design and art, which have been subject to a rising number of interconnections and interdependencies. In this respect, museums have been considered important means of sustaining the designer fashion industry, notably through the display of fashion designers' creations in the form of temporary retrospective exhibitions.

Secondly, a network of creative fashion designers tends to concentrate in urban environments and to produce an intangible cultural milieu that is highly significant to contemporary economic development. In addition to agglomeration economies (with particular reference to the presence of traditional craftsmanship) and urban amenities, fashion designers are strongly attracted by the presence of an urban 'social milieu', where they can cultivate informal social relations with creative workers, have access to key 'gatekeepers' (e.g., editors, magazines, public relations, celebrities) and obtain media attention. In particular, social relations allow fashion designers to acquire information, visibility, and recognition in the industry, and to promote creativity and innovation among multiple creative producers such as designers, architects, and artists. In this context, 'third places' like bookstores, restaurants, nightclubs, coffee shops, as well as fashion-related events (e.g., exhibitions, trade fairs, catwalk shows, gallery openings, industry parties) provide important opportunities for informal networking, relationship building, and knowledge creation and dissemination.

Thirdly, from a wider perspective, cities play a key role in the material and symbolic production of fashion design, defining the social and economic parameters of creativity of the designer fashion industry. On the one hand, a series of cultural intermediaries, which are concentrate in cities, assist fashion designers in the materialization (e.g., specialised services,

training schools, forecasting services) and commercialization of fashion (e.g., fashion shows, trade fairs, fashion retail and wholesale, fashion journalism). In particular, fashion education system has played a significant role in the formation of fashion designers, development of designer fashion industry and promotion of several fashion cities. It acts as a significant link between fashion design training and the local designer fashion industry, functioning both as an incubator of local creative talent and as a key platform for knowledge exchange and social interaction. Cities are also endowed with several cultural institutions that function as an important source of stimuli and inspiration for the design concept such as architecture, art galleries, museums, opera, theatre, open-air markets, fashion weeks, shopping districts and so forth.

Table 1.5. Factors and conditions affecting the concentration of fashion designers and related industries in cities

Factors and conditions	Reasons
Fashion districts	Easy access to manufacture, fashion design, high-skilled workers, and related support services like suppliers, retailers, and training institutions.
Traditional craftsmanship	Opportunity to collaborate with artisans and to enhance the value of products through craftsmanship.
Economic and industrial transformation, spatial cost fluctuations, and entrepreneurship policies	Creation of demand for talent, possibility of renting cheap and large spaces, and local support in terms of founding or advertisement.
Cultural and creative industries and crossover industries	Possibility of inter-sectorial knowledge spillovers, cross-fertilization, learning experience and innovative interactions.
Forms of local consumption, high levels of purchasing power, and the presence of an affluent and sophisticated clientele	Opportunity for fashion designers to create brand identity and to acquire recognition in the industry.
Cultural institutions and activities, creative and artistic atmosphere, lifestyle, quality of place, cultural diversity, tolerance and liveability	Source of inspiration for fashion designers who can foster their creativity through a huge variety of diverse people and businesses.
Social milieu and social venues (e.g., book stores, coffee shops, restaurants, nightclubs, exhibitions, gallery openings)	• Face-to-face interactions with designers and other industry/creative actors; • Access to key gatekeepers and opportunity to have media attention, and acquire visibility and recognition; • Opportunity to build networks, develop important collaborations in the industry and gain experience; • Tacit knowledge exchange and promotion of creativity and innovation.

Sources: Author's elaboration.

In short, the 'creative fashion city' (Figure 1.4), which is thought of as a particular example of the creative city paradigm, can be defined as a local creative ecosystem centred on a designer fashion industry, cultural and creative industries, and a creative class of fashion designers, which are variously supported in the creation, materialization, and commercialization of fashion design by:

- A creative and artistic atmosphere, a broad range of cultural activities (e.g., art galleries, museums, opera, theatre, open-air markets) and 'third places' (e.g., nightclubs, coffee shops, bookstores, co-working creative spaces, various types of events) for cultivating informal social relations, fostering knowledge exchange, acquiring recognition in the industry, and stimulating creativity, innovation and artistic inspiration for the design concept;

- Institutions and actors like manufacturing firms, high-skilled workers, wide-ranging service providers, and training institutions primarily in support of the materialization of fashion design;

- Intermediaries like fashion shows, trade shows, fashion magazines, key trade publications, public relations, editors, buying offices, new social networking websites, bloggers, wholesalers and retailers primarily in support of the commercialisation of fashion design.

All these elements are closely intertwined and form a complex ecosystem, where local creativity, fashion culture and tacit knowledge, which cannot be easily replicated elsewhere, are generated over time in the form of place-based associations. This, in turn, contributes to the creation of cultural capital of cities and to the perpetuation of the status of the 'creative fashion city'.

Figure 1.4. Theoretical framework: The 'creative fashion city'
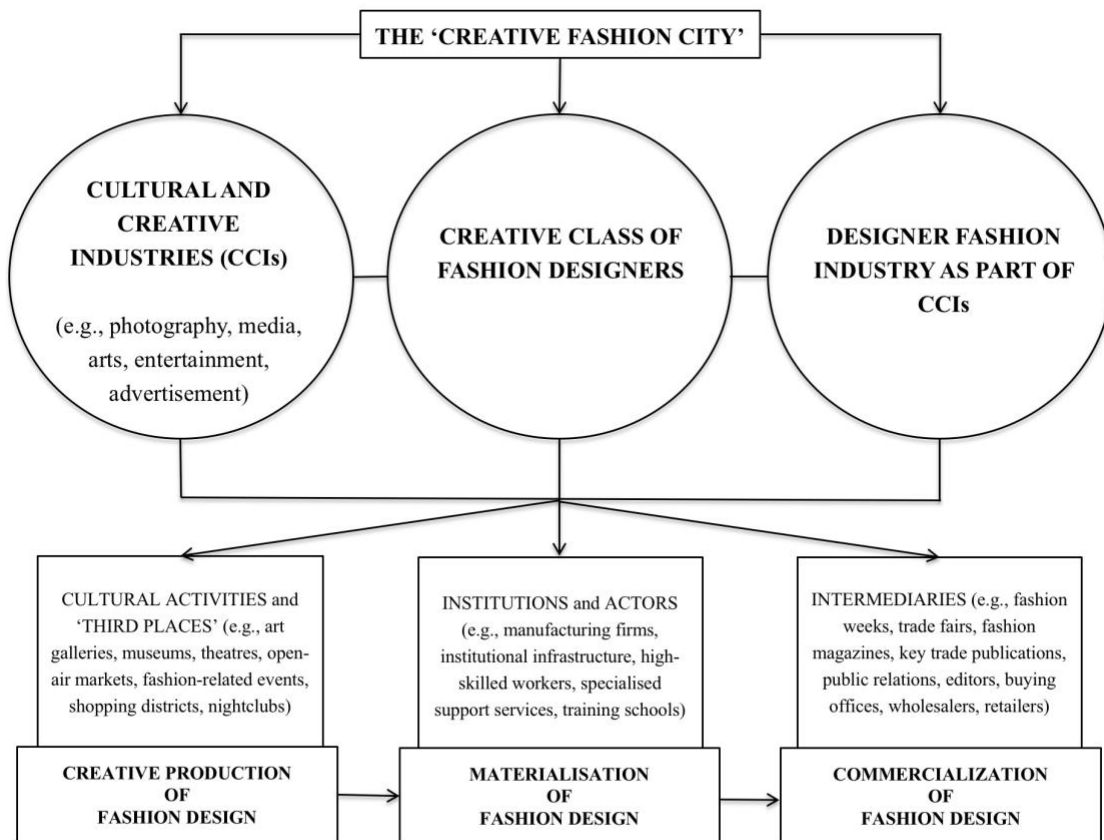
Sources: Author's elaboration.

1.10. Conclusions

The aim of the chapter was to provide a theoretical framework for the fashion city concept in an attempt to further the understanding of the meaning and significance of this phenomenon in the contemporary scenario. Drawing upon an extensive review of academic literature on the concept from different research disciplines, the fashion city idea has been analysed through a 'creative approach', with a particular focus on the designer fashion industry as a particular CCI and fashion designers as an example of the wider 'creative class'. Firstly, the analysis has highlighted how the designer fashion industry has become a key component of the paradigm of the CCIs and of the cultural economy, contributing to the rise of the idea of the fashion city as a new paradigm for local development. Secondly, relying upon the creative city theory, attention has been given to the analysis of the causes, factors and conditions that have affected

the concentration of the designer fashion industry and of the creative class of fashion designers in cities. The analysis carried out in the chapter has resulted in a definition of the 'creative fashion city', which is thought of as a specific model of the creative city paradigm.

The 'creative fashion city' has been defined as a local creative ecosystem centred a designer fashion industry, cultural and creative industries, and a creative class of fashion designers. A series of cultural actors, institutions, and conditions support the creation, materialization, and commercialization of fashion design in cities. A creative and artistic atmosphere, together with a broad range of cultural activities, help stimulate creativity, innovation, and artistic inspiration for the design concept. The presence of 'third places' like nightclubs, coffee shops, and events provide opportunities for cultivating informal social relations and for sustaining both creative production and commercialisation of fashion design. Several local actors and institutions are in support of the materialization and commercialization of fashion design. All these elements are closely intertwined and form a complex ecosystem, where local creativity, fashion culture and tacit knowledge are generated over time in the form of place-based associations and contribute to enhancing the cultural capital of cities and perpetuating the status of 'creative fashion city'.

This theoretical framework analyses the fashion city idea from a perspective that considers the designer fashion industry as a mere creative industry, fashion designers as an example of creative class, and the fashion city as a specific model of the creative city concept. The analysis contributes to systematizing the literature on the topic and to furthering the understanding of the fashion city idea by suggesting a theoretical framework for thinking about the relationship between fashion and cities. However, this approach tends to treat the fashion city as a singular category and directs attention only to a particular kind of urban context, which benefits from conventional approaches to CCIs where fashion design becomes part of broader CCI-based policies. In this sense, fashion design is isolated from the wider complexity of the broader fashion industry in cities, which includes other fundamental elements like fashion manufacturing, retailing, distribution, media system, events organization, fashion journalism, and fashion education. The framework does not address the actual heterogeneity of fashion centres in the world, but primarily functions as a theoretical means of organizing the academic discussion on the topic from a specific 'creative' approach. The next chapter aims to address the complexity and variety of contemporary urban fashion formations moving towards the definition of an analytical framework.

Chapter 2

Towards an analytical framework for unpicking the fashion city: Models, development patterns and ideal types

ABSTRACT

The globalization of traditional manufacturing, changes in the 'symbolic economy' of media and developments in forms of consumption have led to a heterogeneity of fashion centres, including not only the traditional fashion's world cities but also new 'second-tier cities' of fashion with high symbolic value. This chapter argues that treating fashion design as just another example of CCI underplays its complexity, the heterogeneity of the relationship between fashion and the urban, and the importance of a wider global perspective. It draws upon the idea that the fashion city should not be treated only as a singular, undifferentiated, and unchanging category. Instead the chapter is aimed at moving towards an analytical framework for thinking about fashion's relationship with cities that can encompass both multiple models of traditional urban fashion formations and the existence of contrasting development patterns in newer fashion cities. It proposes three Weberian ideal types of fashion cities: the 'manufacturing', 'design', and 'symbolic' fashion cities. While these ideal types are only accentuated abstractions, they help analyse the complexity and diversity of fashion city formations and speculate about future pathways. The chapter contributes to expanding the literature on the topic through the analysis of different kinds of position that fashion plays in urban economies. The ideal type approach has also important policy implications and shifts away from the dangers of reading other cities as simply 'second tier' or developing versions of established models set by established centres.

Keywords: fashion's world cities, second-tier cities, manufacturing, design, symbolism, ideal types.

2.1. Introduction

The idea of the 'fashion city' has recently emerged as a potential strategy for revamping major and minor cities, celebrated in many academic approaches and 'urban-booster' commentaries, and sought after by urban authorities and local governments. In this context, fashion design has been included in a rising number of urban policies aimed at regenerating local economies through CCIs and at promoting the paradigm of the creative city. There has been increasing awareness of its economic and cultural significance, particularly due to its capability of generating economic value through creative processes and of enhancing the cultural capital of cities (DMCS, 2001; Scott, 2002; Power and Scott, 2004; Breward and Gilbert, 2006; Rantisi, 2011). The previous chapter has suggested a theoretical framework for the fashion city idea drawing upon a 'creative' approach, which focuses on the designer fashion industry as a mere CCI, fashion designers as an example of creative class, and the fashion city as a specific model of the creative city paradigm. Thus, the 'creative fashion city' has been defined as a local creative ecosystem centred on cultural and creative industries, a designer fashion industry, and a creative class of fashion designers.

However, there are issues in treating fashion design only as a cultural and creative industry. In fact, more than most other CCIs, fashion still necessarily operates as an assemblage of physical and symbolic production processes, reliant on both the traditional manufacturing of garments and on the production and transmission of powerful symbols. The contemporary fashion industry combines a highly globalised manufacturing chain with a designer fashion sector mostly concentrated in fashion's world cities, together with other image-producing activities that contribute to the creation of place-based symbolic narratives (Williams and Currid-Halkett, 2011). Particular cities, such as Paris and London, have distinctive 'lineages' of this intersection between physical and symbolic production, but over time there has been a diversification of the relationships between fashion and cities, as well as a proliferation of different types of fashion centres.

Offshoring and the relocation of manufacturing in lower-cost cities, together with the development of 'fast fashion' production complexes and the enhanced use of Information Technology (IT) to connect design and production over long distances, have profoundly altered the geographies of the fashion industry (Segre Reinach, 2005). The geography of fashion centres has also been complicated by changes in the 'symbolic economy' of media, promotional activities, and events, as well as developments in forms of retailing, shopping,

and consumption. As a result, in addition to fashion's established world cities, in recent years, a number of so-called 'second-tier' or 'not-so-global' cities of fashion that make extensive use of forms of symbolic production have achieved growing visibility (Rantisi and Leslie, 2006; Larner et al., 2007). These new centres of fashion culture are not included in the traditional urban hierarchy of fashion's world cities, which comprise cities like New York, Milan, Paris, and London, but have emerged more recently in the international geography of fashion.

This chapter argues that treating fashion design as just another example of a CCI underplays its complexity, the heterogeneity of the relationship between fashion and the urban, and the importance of a wider global perspective. There are, of course, elements of urban fashion formations that do benefit from conventional approaches to CCIs, particularly those that identify fashion design clusters and their interconnections with other CCIs, and which address fashion designers' locational behaviour. Such approaches tend to isolate fashion design from the wider complexity of the fashion industry, and to direct attention to particular kinds of urban context. But moving away from this very specific focus, it is necessary to be confronted with diffuse and unstructured notions of the 'fashion city.' As already discussed in the previous chapter, existing research has mainly focused on individual examples of fashion's world cities and on new urban fashion formations, without addressing the phenomenon from a global perspective. There is a lack of a comprehensive explicative theory of the fashion city. In particular, to this day, limited research has been carried out to understand whether it is possible to identify diversities and commonalities in the current heterogeneity of fashion centres in the world. What is lacking is an analytical framework to deepen the understanding of the different nature of fashion centres.

Thus, the argument of this chapter is that the fashion city should not be treated only as a singular, undifferentiated, and unchanging category. There is very significant diversity in the nature of cities where fashion is an important element of the local economy and global reputation. The chapter is aimed at moving towards an analytical framework that recognizes different models, but that also allows for thinking about the historical trajectories of different cities and their interrelationships in a wider system. It also identifies contrasting strategic patterns in the development and promotion of new centres of fashion culture. In particular, it draws upon Weber's ideal type approach to unpick the nature of the fashion city by highlighting three ideal types of fashion centres: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city'. While these ideal types are only accentuated

abstractions, and no real city fits them exactly, they work as a heuristic device, helping analyse the diversity of fashion city formations and speculate about future pathways.

The analytical framework both complements and extends the now very familiar division between 'fashion's world cities' and 'second-tier cities' of fashion. In particular, it shifts away from the dangers of reading other cities as simply 'second tier' or developing versions of established models set by established centres, and the simplistic 'tool-kit' approaches that have characterized some attempts to promote new fashion centres. It also sheds light on the complexities and the diversity of current urban fashion formations in the world, providing a structured framework of analysis that may stimulate reflection on the changing relationship between fashion and the urban in the contemporary scenario. Moreover, it investigates the significance of different kinds of position that fashion plays in urban economies, and the different types of creativity that are associated with the industry, which extend beyond the standard paradigms of the CCIs and of the creative city.

2.1.1. Research methodology

The entire framework is divided in three main sections of analysis that identify 1) multiple analytical models of fashion's world cities, 2) contrasting patterns of development and promotion of second-tier cities, and 3) ideal types of urban fashion formations. The research is carried out through an extensive review, analysis, and systematization of academic literature on individual fashion's world cities and second-tier cities of fashion. The Weberian analytical tool of the 'ideal type' is then used to construct models of fashion cities, which are defined through some key 'dimensions' that have emerged as essential elements common to fashion city formations from the above analysis.

Firstly, the analysis focuses on the formation, evolution, and character of New York, Milan, Paris, and London, which are commonly regarded as the most significant world's fashion capitals. Diversities and commonalities in terms of characteristics that are present to greater or lesser extent in each centre are used to construct analytical models of fashion's world cities. More specifically, common and distinctive elements of these centres are systematised and organised by two variables: the first one refers to the city's orientation towards 'material' or 'symbolic' models of fashion production, while the second one is related to the extent to which specialized artisanal production remains significant in the urban economy. Each of the fashion's world cities has a different position in this analytical schema. Secondly, drawing

upon an analysis of second-tier cities of fashion, two broad tendencies within strategies to develop and promote new fashion centres are identified: the first one is focused on fashion design as a form of CCI, while the second one is based on place branding and symbolic production.

Thirdly, Weberian ideal types are used to construct models of fashion cities, which emphasize key formations of the relationship between fashion and the urban in established and newer fashion centres. Max Weber (1864-1920) described ideal types as mental constructs, formed by 'one-sided accentuation' of key elements into a 'unified analytical construct', that do not correspond directly to existent or historical case studies, but which enable critical comparisons and discussion of developmental paths. Ideal types are defined through the analysis, abstraction, and combination of typical characteristics, features, or traits that are common to a variety of phenomena in order to conduct comparative analyses. From the analysis of fashion's world cities and second-tier cities of fashion, some essential dimensions that are common to fashion city formations emerge: 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'.

Thus, working with these, identifying similar patterns and features as well as giving 'one-sided accentuation', moves analysis towards three ideal types: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city.' Fashion cities at different points in time may tend towards diverse ideal types of fashion centres. In this respect, the ideal type construct is flexible and adaptable to changes in the nature of fashion cities. As already discussed above, these ideal types are only conceptual abstractions and do not correspond fully to any existing or historic formation, but fashion cities have some elements of each model. The ideal type construct has been often criticised for being an ambiguous and over-simplified method of analysis. However, for the purpose of this dissertation, ideal types are only used as a heuristic device to analyse the diversity of fashion city formations and to speculate about future pathways.

The chapter is structured as follows. The first section describes the historical development and current trajectories of fashion's world cities, particularly New York, Milan, Paris, and London, and identifies common traits and pressures. The second section examines contrasting models for the development and promotion of the so-called 'second-tier cities' of fashion. The third section highlights how new centres of manufacturing activity may now become the sites of more complex fashion cities, drawing upon the synergies between material production, design

and wider local cultural characteristics. The final section draws upon Weber's ideal type approach to put forward a tri-polar scheme for analysis, that replaces a search for the characteristics of the 'fashion' city with three ideal types: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city'. Conclusions summarize the main findings and discuss the implications arising from the development of the analytical framework.

2.2. Material and symbolic production of fashion: An analysis of fashion's world cities

Fashion has long been associated economically and symbolically with a handful of cities in Western countries, particularly New York, Milan, Paris and London (Breward and Gilbert, 2006). These are regarded as 'fashion's world cities', where material and symbolic production, commerce, and consumption of fashion converge, generating very significant economic value. These cities are irresistible 'to talented individuals who flock in from every distant corner not only because they offer significant forms of employment but also because these are the places where professionals fulfilment can consistently be best pursued' (Scott, 2008, p. 94). They are marked strongly by elements of the 'new cultural economy', and fashion benefits from clustering of a wide range of creative activities, for example photography, journalism, media, PR, and advertising. Fashion's world cities also benefit from a rich infrastructure of cultural institutions including art galleries, museums, theatres, libraries, festivals and elite universities that enhance their attractiveness and have both economic and symbolic value (Volonté, 2012). However, there is rather more to the relationship between fashion and these major urban centres than the familiar story of the new cultural economy and the CCIs.

Drawing upon the extensive literature on 'world cities' (Friedmann, 1986)[11] and 'global cities' (Sassen, 1991)[12], these urban centres have been initially studied from a perspective that emphasizes their position within broader economic and political structures, as well as the hierarchical nature of their urban ordering. Although it currently exists a clear separation

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[11] In Friedmann's work (1986) 'the world city hypothesis', the most important factor in explaining the nature of key 'world cities' is the type of their integration within the world economy, which strongly affects the structural changes in their single economies. As a result, cities have to be understood as part of a world system with connections between major centres and a specific position within a precise hierarchy of cities. New York, London, and Paris are at the top of the hierarchy and are described as 'primary core cities'.
[12] Sassen (1991) argues that the financial deregulation, the development of new forms of telecommunications, together with media and information technology have generated a new logic for the concentration of high-level professional services activities, associated with a process of de-industrialization of more traditional urban activities in few great cities (e.g., global cities) usually marked by high concentration of health.

86

between the geographies of fashion and those of finance and business services, the emergence of these cities was not entirely disconnected from their strong economic and political position within international global networks (Beard, 2011). There is some overlap between fashion's world cities and global cities, which have been described as places with a crucial role in the worldwide economic system and an intense accumulation of wealth (Gilbert, 2000).

These world centres of fashion are strongly interconnected, forming an urban hierarchy through interwoven flows of people, goods, and symbols and acting as hubs of 'command and control' (Friedmann, 1986) in 'strategic transnational networks' (Sassen, 1991; Gilbert, 2013). Clearly the fashion industry in these cities benefits from the wider geographies of capitalist organization, in terms of access to capital, financial infrastructure and business services, as well as the co-location of the headquarters of major companies. In fact, they include embedded industrial systems and the largest international fashion companies and conglomerates (e.g., Kering, LMVH), together with the best fashion design schools and a wide range of support activities (e.g., photographers, advertising and media companies, showrooms, flagship stores), which contribute to attracting the best pools of talent in the world (Hauge et al., 2009; Jansson and Power, 2010).

Besides being powerful business and managerial centres, they function as aesthetic places with strong symbolic power, where managed narratives, images and myths about fashion are created and disseminated continuously in space and time (Hauge, 2006; Weller, 2006). In particular, the most acclaimed international premier fashion events allow these cities to dominate the entire fashion system, imposing trends and flows for the global fashion industry (McRobbie, 1998; Volonté, 2010). The leading fashion weeks, organised in a continuous cyclical circuit with definite changing hierarchies, are important showcases for designers, products, and symbols from all around the world and contribute to building a distinctive cultural identity of these centres (Ling, 2012).

A variety of other 'brand channels' including media events, flagship stores, showrooms, shopping malls, retail districts and advertising serve for the communication of interlinked place-based images about fashion culture that reinforce the primacy of these cities (Jansson and Power, 2010). The typology of fashion developed in these centres has borrowed specific mythologies associated with urban space in the collective imagination (e.g., Paris with elegance, New York with dynamicity) (Berry, 2011). Moreover, firms located in these cities benefit from 'dynamic knowledge communities' and their positive associations with specific places (Jansson and Power, 2010). As Godart (2014) suggests, these cities can be seen as

having an oligarchic position, distinctive in their power and influence, bound into restrictive or exclusionary networks and systems, and radically different from other cities in relation to in fashion's geographies.

Although previous studies have primarily addressed these cities as locations of production, they also play a leading role as significant consumption centres (Potvin, 2009; D'Ovidio, 2016). In this respect, due to their high symbolic value in the collective imaginary, many companies and designers aspire to create intangible associations with these centres, in order to achieve competitive advantage and enhance their reputation. For instance, designer fashion houses usually aspire to open flagship stores in the prestigious fashion streets of these cities (e.g., Bond Street in London, Fashion Quadrilateral in Milan, Fifth Avenue in New York, Rue du Faubourg in Paris), with the aim of convincing consumers of the quality of their products and of improving their symbolic position in the geographical order of fashion (Arrigo, 2011). In addition, in some cases, foreign designers, such as those coming from Tokyo and Antwerp, have used these cities as platforms for their collections in order to add intangible value to their names and gain international reputation in the global fashion market (Kawamura, 2006). Table 2.1 shows the most distinctive and internationally known elements (i.e., designer fashion companies, fashion design schools, fashion districts and fashion events) that nowadays characterize the fashion world's cities of New York, Milan, Paris, and London.

Table 2.1. Most distinctive characteristic elements of fashion's world cities

CITES / ELEMENTS	NEW YORK	MILAN	PARIS	LONDON
FASHION COMPANIES HEADQUARTERED	Coach, Donna Karan New York, Ralph Lauren Corporation, Alexander Wang, Diane Von Furstenberg, Tom Ford, Phillips-Van Heusen Corporation (including Calvin Klein, Tommy Hilfiger, Michael Kors, and many others)	Giorgio Armani S.P.A, Dolce&Gabbana, Marni, Gianni Versace, Valentino, Ermenegildo Zegna, Trussardi, Moschino, Miu Miu, Prada, Etro, Krizia, Jil Sander, Antonio Marras	Kering group (including Gucci, Bottega Veneta, Saint Laurent, Alexander McQueen, Balenciaga and many others), LVMH group (including Louis Vuitton, Fendi, Céline, Emilio Pucci and many others), Chanel S.A., Jean-Paul Gualtier, Nina Ricci, Lanvin, Chloé, Pierre Cardin, John Galliano S.A.	Burberry Group Plc, Mulberry UK, Aquascutum, Vivienne Westwood, Victoria Beckam
FASHION DESIGN SCHOOLS	Parsons School of Design, Fashion Institute of Technology, Pratt Institute, LIM College	Istituto Europeo di Design (IED), Nuova Accademia di Belle Arti (NABA), Istituto Marangoni International, Domus Academy	ESMOD International, École de la Chambre Syndicale de la Couture Parisienne (EDLCS), Institute Français de la Mode, International Fashion Academy, Studio Berçot	Central Saint Martins, Kingston University, London College of Fashion, University of Westminster, Middlesex University, Royal College of Art
SHOPPING STREETS AND DISTRICTS	Fifth Avenue, Broadway, Madison Avenue, Seventh Avenue, 57th Street, Soho, Orchard Street, West Village	Quadrilatero della Moda (Via Montenapoleone, Via della Spiga, Via Manzoni and Corso Venezia), Navigli-Porta Ticinise, Galleria Vittorio Emanuele II, Corso Como, Corso Buenos Aires	The rue du Faubourg Saint-Honoré, Avenue Montaigne, Boulevard Montmartre, Boulevard Haussmann, Champs Elisées, Rue de Rivoli, Rue de Rennes	Oxford Street, Bond Street, Sloane Street, Knightsbridge, Kings Road, Regent street, Savile Row, Jermyn street
FASHION EVENTS	New York Fashion Week, MADE Fashion Week, Olympus Fashion Week	Milan Fashion Week Womenswear, Milan Fashion Week Menswear	Paris Fashion Week, Haute Couture Fashion Week, Ready-to-Wear Fashion Week, Men's Fashion Week	London Fashion Week, London Fashion Week Men's, The Fashion Awards, London Fashion Week Festival, Pure London

Sources: Author's elaboration.

2.2.1. The historical formation of fashion's world cities

In the last decades, a number of studies from various disciplines, such as Economic Geography, Urban Planning, Economic History, Cultural Economics, and Cultural Geography, have shed light on the historical formation of fashion's world cities, in addition to their more recent evolution and their current relationship between fashion and the urban (Breward and Gilbert, 2006). A complex sequence of manufacturing systems, economic elements, and cultural factors seems to have contributed to their material and symbolic development (Scott, 1996; Volonté, 2010; Gilbert, 2013). The history and formation of these global centres have been heterogeneous, undergoing a varying process that has combined both production and consumption and has integrated physical and symbolic contents (Scott, 2000). The long-term historical geography of these centres was bound up with major developments, including the urban consumer revolution in eighteenth century Western Europe, the economic and symbolic systems of European imperialism and the consequent rivalries between cities, and the complex relationship between the emergent United States and the cultural authority of Europe (Gilbert, 2013).

While each of the major fashion centres had its own distinctive characteristics, chronology and trajectory, it is possible to identify certain commonalities in this urban formation that critically worked through combinations of production, creative design activities, the symbolic economy, and consumption. It is also clear that these formations have changed markedly since the late-twentieth century, particularly in response to changes in global production geographies. These leading fashion cities were organised around industrial structures and regional manufacturing systems of 'flexible specialisation', capable of responding quickly to changes of style, and able to foster close relationships between skilled craft-workers, designers and entrepreneurs. At the same time, these were places where image-building activities could create strong place-based associations. In particular, in the late nineteenth and twentieth, it was the emergence of a modern media system that played a key role in the image-building process of these centres, cementing their position in the 'symbolic economy' for fashion (Rantisi, 2004a; Merlo and Polese, 2006; Rocamora, 2006). In fact, through powerful representations not just in fashion magazines, but more widely in cinema, television, photography, events and advertising, and more recently online, these cities sustained a position as acknowledged international centres of style (Berry, 2012). Notably, the development of the modern fashion press has strengthened the idea that only few cities had a distinctive significance in the global geography of fashion (Gilbert, 2006).

The archetype of this formation was Paris; its distinctive industrial structure has usually been regarded as a core element of its rise as the most prestigious of fashion capitals in the nineteenth and twentieth centuries. Paris's system combined highly skilled, specialized artisans with a clustering of elite designers, working through the highly distinctive and regulated couture system, which ensured exclusivity and scarcity, while also establishing hierarchal structures for the licensing longer-runs of more available versions (Green, 1997). However, the city's status also depended upon a long history of cultural representation, in the fashion media but also more widely, that established and sustained Paris's symbolic pre-eminence in the cultural geography of fashion (Rocamora, 2006; 2009; Godart, 2014).

A similar pattern exists in other fashion's world cities. New York is revealing in this regard, having reinvented itself from a second-tier apparel-manufacturing hub, often reliant on Paris for creative and design inspiration[13], to a world fashion city in the 1940s. Its industrial position was primarily based on the women's apparel industry with specialization in ready-to-wear, which originated in the nineteenth century and was based on high-volume production for mass-market consumers. However, the rise in importance of fashion magazines (e.g., Vogue US in 1892, Harper's Bazaar in 1867, Women's Wear Daily in 1910), the establishment of globally renowned fashion weeks and of prestigious specialist educational institutions (i.e., 'Pratt Institute' in 1888, 'Parsons School of Design' in 1897, 'Fashion Institute of Technology F.I.T.' in 1944), together with retailing and trade associations, strongly encouraged the image-building of New York as renowned fashion capital (Rantisi, 2002).

Similarly, the rise of Milan as a fashion world city in the 1970s was predicated on its distinctive productive structure, but also on its symbolic promotion. Milan was situated in one of the largest European agglomerations of textile and clothing manufacturing firms, with a distinctive economic structure of flexible production in small specialist firms, the so-called 'Third Italy' (Bagnasco, 1977). Milan's reputation as a global centre of high-end ready-to-wear fashion drew upon a reputation for high-quality craft production and manufacture. But Milan's success also depended on the international reputation of key designers such as Giorgio Armani and Gianni Versace, and critically their success in branding to develop large designer fashion multinationals. Milan's rise also depended on the symbolic and institutional

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[13] At the end of the nineteenth century, Paris was a world centre of cultural creativity and high-fashion, being regarded as a unique fountainhead of design, innovation, and creativity, as well as an irresistible magnet for international artistic and fashion talent. However, after the World War II the power of creativity started to shift from Paris to New York, with many European artists moving to the United States (Scott, 2000; Rantisi, 2004a).

promotion of the city through the fashion press, significantly *Vogue Italia* from 1965, as well as trade fairs and Milan fashion weeks (established from 1958, but of global significance from the 1980s onwards) (Merlo and Polese, 2006; Jansson and Power, 2010).

Lastly, London has historically combined a complex manufacturing base of East End workshops and skilled tailoring, particularly known for high-quality menswear, with a strong media and retail sectors, and distinctive fashion educational institutions. London has a strong brand identity, drawing upon its history of youth movements and subcultural forms in promoting a highly distinctive set of place-based associations, which now feed into internationally significant fashion events and exhibitions (Godart, 2014).

2.2.2. The evolution of fashion's world cities: Towards new fashion formations

As appears from the above, a combination of manufacturing and symbolic factors has jointly contributed to fashion's world cities' formation. In this respect, according to Kawamura (2005), fashion can be defined as a 'manufacture cultural symbol', where various actors (e.g., manufactures, designers, retailers, media, institutions, journalists) contribute to generating economic value and perpetuating the symbolic narrative about urban fashion. However, the fashion world city formation came under pressure from changes in the global economy. Of the four fashion's world cities, London experienced the earliest and most pervasive de-industrialization, but all the fashion world cities have been markedly transformed. While skilled craftwork and finishing trades do survive to a greater or lesser extent in these cities, all have been profoundly altered by the ways that economic globalization has accentuated the separation between physical and symbolic forms of fashion production. Since the early 1970s, the globalization of the production chain, trade liberalization measures and the intense competition deriving from lower-cost locations, have affected the fashion industry in terms of business practices and production systems, leading to a severe contraction of its traditional manufacturing (Scott, 2002; Evans and Smith, 2006).

The collapse of domestic manufacturing has forced the industry to downsize and focus on creativity-oriented, design-based, and high-value activities to survive in the post-industrial economy. The physical production of garments has been relocated away from North America and Europe to lower-cost cities in India, China, Morocco, Turkey, South America, Africa, and Eastern Europe. As a result, all of fashion's world cities have shifted towards design and symbolic activities. More specifically, in order to respond to these competitive pressures,

sustain regional industries and retain their significant role of fashion's world cities, they have growingly focused on the designer fashion industry and image-producing activities like fashion shows, media coverage, retailing, distribution, and major events (Hauge *et al.*, 2009; Aspers, 2010; Arrigo, 2011; Skov, 2011). The clustering of service-based activities such as advertising, corporate law and finance in these cities has strongly facilitated the concentration of high-value activities. Thus, nowadays, while the physical manufacturing of garments is increasingly geographically dispersed, the designer fashion sector tends to concentrate in space and notably in fashion's world cities (Gilbert, 2013).

A range of cultural intermediaries and institutions have played a crucial role in enabling local apparel actors to face new competitive pressures and to balance emerging symbolic attributes with older commercial ones, contributing to perpetuating the culture of fashion in these cities (Rantisi, 2004a; 2006; Kawamura, 2005). In particular, they have been critical in supporting the representation of these centres as 'locations for fashion consumption' and as 'imagined spaces of fashion fantasy narratives' (Gilbert, 2006; Berry, 2012). For instance, a variety of actors interested in fashion for their own strategic reasons, have collaborated in transforming Milan into a fashion's world capital through the use of several 'brand channels', which disseminate messages and provide the city with significant and unforgettable symbols. Promotional events (e.g., trade fairs, fashion weeks, temporary exhibitions), the communicative action of spokespeople (e.g., fashion designers, models, celebrity stars, buyers), flagship stores, retail districts, showrooms, and direct advertising channels (e.g., billboards[14], posters, signage) have contributed to shaping the image of the city as a global centre of fashion design (Jansson and Power, 2010). As another example, globalization has thoroughly affected the Garment District of New York, which has been forced to move part of its apparel manufacturing offshore, facing a severe decline in terms of employment and number of establishments. However, this industry has been capable of coping with growing competitive pressures thanks to the growth of design-intensive and image-based activities (e.g., designer fashion, wholesalers). Such shift has been supported by an institutional cultural infrastructure, which has allowed New York to maintain its status of a world capital of fashion (Rantisi, 2002; Williams and Currid-Halkett, 2011).

To sum, over time, fashion's world cities have evolved from being manufacturing hubs endowed with different forms of cultural production to becoming locations with high

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[14] For example, the Emporio Armani's billboard in Via Broletto in Milan has become a key 'branding tool' for promoting the culture of fashion in the city (Potvin, 2009).

symbolic value, which are growingly autonomous from their domestic production. In this context, forms of design, organizational quarters, and media have become more important than the clustering of manufacturing firms (Rantisi, 2004a, Jansson and Power, 2010). The creation and communication of valuable symbols has gained increasing importance against the physical production of garments, and fashion has gradually developed from a manufacturing-driven to an image-based industry (McRobbie, 1998). Jansson and Power (2010) state that global cities, to maintain their reputation as leading fashion design centres, need to offer local actors an adequate set of channels for the communication of symbolic value. However, although recent trends of globalization, industrial restructuring, and economic turbulence have profoundly affected the fashion industry by weakening its industrial and manufacturing platform, the geography of fashion's world cities has changed little over the years. New York, Milan, Paris, and London continue to retain their enduring identity and status, ranking among the top ten fashion cities in the world (GLM[15], 2015), and maintaining their economic and symbolic position in the world geography of fashion[16] (Skov, 2011; Godart, 2014).

2.2.3. Analysing the distinctive characteristics of New York, Milan, Paris and London

While there is a consistent overall trend of a weakening of traditional industrial platforms, and the strengthening of the symbolic economy, recent work has focused on the distinctive characteristics of fashion's world cities. This moves beyond the popular associations with different styles and segments (i.e., Paris with haute couture, New York with sportswear and leisurewear, Milan with high-quality ready-to-wear, and London with innovative and creative apparel) to focus on different pathways for these cities, and particularly on different working orders and practices of local fashion design (D'Ovidio, 2010; Volonté, 2010; Pratt et al., 2012). In the contemporary society, also due to the growth of the ICTs, material and symbolic production are increasingly inseparable aspects of economic cultural systems (Segre Reinach, 2006). However, each fashion's world city occupies a different economic and symbolic position in the worldwide fashion order and shows a specific own identity, nature and

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[15] The Global Language Monitor (GLM), which is a media analytics company that analyses cultural trends in language worldwide, produces an annual ranking of the main fashion capitals in the world based on a big data textual analysis through webpages, blogs, global print, electronic and new social media.
[16] It is worth mentioning that also Tokyo has achieved high significance in the global geography of fashion thanks to the rise of world-ranked Japanese designers in the 1970s and 1980s (Kawamura, 2004).

character, which is strongly associated with local production systems, institutions and actors that are rooted in the territory (Godart, 2014). This section traces the different mixings of these elements and the trajectories of development for each fashion's world city.

NEW YORK

In New York, fashion has been historically associated with the Garment District (now re-branded as 'Fashion Centre' or 'Seventh Avenue'), which is still fundamental to the importance of New York as a fashion's world city. In particular, it has continued to thrive thanks to a significant local demand in addition to the promotion of its image and is strongly supported by a series of intermediary institutions (e.g., design schools). The district emerged in the mid-1800s, in conjunction with an initial industrialization and urbanization process in the United Stated and has its origin in ready-to-wear. In the 1880s New York became highly influential in apparel manufacturing, with the Garment District accounting for 25% of total manufacturing. Later, in the 1990s, the local apparel manufacturing industry employed around 939,000 people. However, due to the outsourcing of production abroad, the sector has now lost around 85% of its workforce (Joint Economic Committee 2016a). Thus, the Garment District has come under pressure as a manufacturing hub, now operating primarily as a source of samples and high-end products[17] for New York-based designers and boutiques. Nowadays, it is an important innovation centre for the local designer fashion industry (Rantisi, 2004a).

The transformation of the Garment District is an indication of the way that fashion in New York, perhaps of all the major centres, has moved towards the model of the CCIs, closely associated with promotion of the figure of the fashion designer. In the 1980s and 1990s a wave of American 'entrepreneurial' designers specialising in sportswear and leisurewear, such as Ralph Lauren, Tommy Hilfiger, Calvin Klein, and Donna Karan, achieved international reputation in the global fashion market, effectively inventing the category of 'designer-wear' (Rantisi, 2002; 2004a; 2006). Behind these headline examples there has been a broader move towards the growth and concentration of fashion design in New York City; around 40% of US fashion designers have been based in the New York area since the early 1990s, and with a very high location quotient of 8.16 for the greater metropolitan area (Bureau of Labor, May 2016).

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[17] Rantisi (2004a) showed that over 60% of manufacturers in the Garment District perform pattern- and sample-making operations.

Although the area has lost upwards of 80% of its manufacturing jobs since 1987, there are still around 400 fashion manufacturing firms in the district (Garment District Alliance, 2017) and around 1,500 fashion manufacturing firms are in the five boroughs of New York (i.e., Manhattan, Brooklyn, Queens, the Bronx and Staten Island). In 2017 the local textile and clothing industry[18] registered a value of employment of 35,860 (Bureau of Labor, May 2017). New York also successfully supports the design sector through fashion institutions and a dense network of support services for all aspects of the fashion process, including fashion magazines, the bi-annual New York fashion weeks, forecasting services, wholesale showrooms and buying offices, as well as a strong and segmented retail sector and shopping culture. Approximately half of the 183,000 people who are employed in the broad fashion industry work in the retail sector (Joint Economic Committee, 2016a). Fashion trade fairs, showrooms and fashion weeks strongly contribute to supporting the local economy by attracting more than 500,000 visitors annually. According to the New York City Economic Development Corporation, the New York Fashion Week generates around $900 million in economic activity. Moreover, the city hosts the headquarters of some of the largest fashion advertising companies in the world (e.g., Women's Wear Daily, Vogue, Harper's Bazaar), as well as a large variety of media and marketing resources in support of local designers who need to build and promote their identity and products (Joint Economic Committee, 2016b).

New York is also home to complementary cultural institutions in the arts (e.g., art galleries, opera, theatres[19]), and a more general cultural milieu that attracts an international pool of creative talent and functions as an important source of creative stimuli and artistic inspiration (Rantisi, 2002; 2006; Volonté, 2012). At the same time, the city is also a major centre of business control in the fashion industry with particular success in translating design success into the basis of global branding strategies, with the Calvin Klein and Tommy Hilfiger brands and the key assets of the PVH Corporation. Nowadays, more than 900 fashion design companies have their headquarters in New York (Joint Economic Committee, 2016a), and in 2017 the city hosted 6,710 designers (Bureau of Labor, May 2017).

There is strong synergy between the fashion design industry and educational institutions, with prestigious local specialist schools (e.g., 'Parsons the New School of Design', the 'Pratt

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[18] This estimate comes from the Occupational Employment and Wage Survey from the Bureau of Labor (May 2017) and specifically refers to the SOC (Standard Occupational Classification) category 'Textile, Apparel, and Furnishings Workers' (51-6000).

[19] The majesty of costumes related to theatrical production has been a significant source of inspiration in the design concept of New York-based fashion designers (Rantisi, 2004b).

Institute', the 'Fashion Institute of Technology') having a global reputation as incubators of local and international creative talent. These schools are estimated to produce around 70% of the workforce employed in the local designer fashion sector (Tokatli, 2011), and there is a significant history of the export of talent to other fashion centres, most notably the late-1990s moves of Marc Jacobs and Michael Kors to the Paris houses of Louis Vuitton and Céline. As well as training in design, the education system is highly business-oriented, providing courses on management, merchandising and marketing, and offering the opportunity to enter the local fashion industry through significant employment opportunities (Rantisi, 2004b). Moreover, these prestigious schools have a secondary economic impact in the city as they contribute to attracting visitors and to generating additional spending in the city.

Public policy on the part of both local government and not-for-profit business associations also reflects shifts in the character of the fashion industry. The policies of the 1980s and 1990s, which aimed to sustain a broad manufacturing and wholesaling economy in the Garment District were succeeded by initiatives that sought to rebrand the district as an up-and-coming area that mixed production and consumption of fashion, and that drew upon the area's distinctive history. In March 2017, New York City Economic Development Corporation (NYCEDC), in collaboration with the Council of Fashion Designers of America (CFDA) and the Garment District Alliance announced a $51.3 million-dollar package to help stabilize and strengthen the garment manufacturing industry. What was significant was that this recognised both the global pressures of competition in apparel manufacturing and the local pressures of gentrification particularly surging property values and rents, but also acknowledged the continuing significance of specialist manufacturing to the design sector. The package provides support for some businesses to move to cheaper locations in the metropolitan area (particularly the new hub at Sunset Park in Brooklyn), but also direct grants for the development of high-tech specialist workshops to support Manhattan-based design (Garment District Alliance, 2017).

MILAN

In Milan, there is still a strong and extensive industrial and artisanal manufacturing sector (Pedroni and Volonté, 2014). The city has a long-established tradition in craftsmanship and the production of ready-to-wear, hosting one of the major agglomerations for textile and clothing manufacturing, which remains relatively competitive worldwide due to its quality,

flexibility and innovation (Segre Reinach 2006). In 2017, fashion manufacturing[20] in Milan accounted for 4,529 firms and 34,870 people were employed in the sector (Chamber of Commerce of Milan, Monza, Brianza, and Lodi, 2017). The fashion ecosystem includes some of the most renowned and powerful designer fashion houses in the world (e.g., Giorgio Armani, Versace, Dolce & Gabbana), which are supported by a large number of creative professionals and support activities (e.g., PR, advertising agencies, model agencies, journalists, magazine editors, photographers, show rooms) (D'Ovidio, 2010). In 2017 the number of firms specialised in design activities (NACE code 74.10), which include fashion design, was 1,884 with a value of employment of 5,126 (Chamber of Commerce of Milan, Monza, Brianza, and Lodi, 2017). The success of the Milanese fashion industry is strongly associated with the model of the 'entrepreneur designer', which emerged in the 1970s and 1980s thanks to the success of renowned fashion talents such as Giorgio Armani, Gianfranco Ferré and Mariuccia Mandelli. This model is still an important focus for the local fashion economy, but has become corporatized and branded, as in the example of Giorgio Armani S.p.A. based in the city. Milanese fashion designers are acknowledged as 'public figures', which symbolically occupy the city (Pratt et al., 2012).

Local individual creativity is primarily associated with the 'culture of wear-ability' or the 'fashion to be worn' oriented towards satisfying the needs of a conservative clientele: business profits and consumers' needs are perceived as more important than radical innovation, artistic expression, and aesthetic qualities (Volonté, 2012). In the same vein, Milanese higher education providers specialising in fashion design provide students with business, technical and craft competences in order to adapt to the local context, which needs to absorb a high number of skilled designers in the production chain. However, these specialist schools are regarded as a weak potential source of creative talent and innovation, and Milan-based companies can turn to designers trained in other major fashion centres for high profile appointments. An intense networking activity is fundamental for local designers and such interaction occurs more for the purpose of business and managerial issues than for enhancing creativity. On the other hand, these professionals tend to perceive a lack of creative stimuli from the local environment, being forced to travel often to other fashion's world cities for nourishing their imagination and stimulating ideas (D'Ovidio, 2010).

Over time, the competitiveness of the local industrial system and its garments has been

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[20] NACE codes (2007) CB13. Textiles, CB14. Wearing apparel (including leather and fur), and CB15. Leather (excluding apparel) and related products.

enhanced by a series of place-based associations, which are generated and attached to products, firms, and sectors thanks to the use of different 'brand channels' (e.g., promotional events, spokespersons and patrons, flagships and showrooms, retail districts and outlets) by local actors. The city has more than 900 showrooms, 14 fashion fairs, and around 6,800 sales outlets that employ over 50,000 people (Chamber of Commerce of Milan, Monza, Brianza, and Lodi, 2017). In particular, tourists and business visitors alike are attracted to Milan's famous 'Quadrilatero Della Moda': a district occupied by the flagship stores of some of the most important designer fashion brands in the world, as well as many emerging local creative fashion boutiques and craft shops. The Milan Fashion Week has become a crucial element in promoting the international image of the city, not just through its position in the international circuit fashion events, but also as a way of attracting tourist and business visitors to the city (Jansson and Power 2010). As an example, the Milan Fashion Week held in February 2018 generated €19 million only in terms of revenues from hotel accommodation (Chamber of Commerce of Milan, Monza, Brianza, and Lodi, 2018). Generally, there have been criticisms that while fashion has been included as a strategic asset in the local government's plans to promote the city internationally, policy-makers and institutions have not adequately supported the local fashion industry, either in terms of its ecosystem of design and production, or its wider symbolic associations (D'Ovidio, 2010; Pandolfi 2015).

PARIS

Paris is one of those cities with a reputation and authenticity 'congealed' in their cultural products (Scott, 1997). Its central position in fashion has to be associated with the emergence of haute couture in the mid-nineteenth century, which has grown not only thanks to an institutionalised system of craft-based production including designers, artisans, journalists and advertising agencies, but also to the monopoly rents generated by strong symbolic associations between the city and cultural production (Kawamura, 2005). In the nineteenth century Paris was known worldwide for being a leading cultural, creative, and fashion centre, capable of attracting artistic talent from France and other countries (Scott, 2000). At the end of the century, the exclusive products of haute couture made Paris the foremost fashion capital in the world, which drew the attention of fashion houses, designers and buyers from all over the world (Rantisi, 2004a). The Parisian haute couture has intensively relied on art, defining itself as a highly creative activity rather than a mere sartorial practice. However, unlike New York, in the past the city suffered from the absence of an extensive retail and

wholesale infrastructure, as well as of a strong manufacturing base and merchandising capabilities, which led many couturiers to license in order to increase their profits and visibility. In this respect, policy makers made very few attempts to remedy these failings (Scott, 2000; Rantisi, 2004a). As was the case with other fashion's world cities, also Paris fashion manufacturing has suffered from the intense outsourcing of production towards lower-cost regions. In the last sixty years, employment in French fashion manufacturing (i.e., manufacture of textiles, wearing apparel, leather and footwear) drastically decreased from 1,023,366 in 1959 to 109,810 in 2014. More specifically, in 2014, fashion manufacturing in the greater metropolitan area of Paris accounted for 6,657 firms and 18,056 employees (Paris Region, 2017).

While Paris's position as archetypal fashion city is originally associated with the birth of its specialization in custom-made styles, cultural representations in the collective imaginary have been fundamental in shaping and defining its preeminent position in fashion (Berry, 2011; Godart, 2014). Together with the emergence of a creative wave of 'star' designers in the 1950s and 1960s (e.g., Christian Dior, Christòbal Balenciaga, Karl Lagerfeld, Pierre Cardin, Yves Saint Laurent), a powerful mass media system (e.g., fashion magazines) contributed enormously to shaping and disseminating mythologies about the city's supposedly endemic culture of fashionability: central to these mythologies was the figure of 'la Parisienne', an international icon of taste and distinction, notable both for her exquisite clothing, and her performance of fashion in the boulevards and night-life of the city (Rocamora 2009; Knox, 2011). Thus, the city achieved its status as the foremost fashion capital in the world thanks to the capability of building symbolic spaces for the culture of fashion, becoming an attractive 'fashion object' worldwide.

'Paris Fashion' is perhaps the most powerful brand image of a specific place in the modern history, that at times seems to float free of connections with any specific element of the city's material fashion economy (Gilbert, 2000). There is benefit to companies and designers[21] in having any kind of connection to the city. In addition to the Paris Fashion Week, which contributes €1.2 billion to the local economy, a large number of leading trade shows and world-class fashion events like Première Vision, Première Class and Who's Next, attract key players of the sector from all over the world. In particular, trade fairs held during the Paris

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[21] Several fashion houses have included the city's name within their branding strategies (e.g., L'Oréal Paris) (Godart, 2014). Moreover, the international success of some Japanese designers in Paris and the related French legitimization has contributed to placing Tokyo on the international fashion map (Kawamura, 2006).

fashion week are seen as the most important places to sell collections because of the large number of designers and retailers attending these. Nowadays, prestigious flagship stores, innovative boutiques, and department stores, most of them located in prime fashion retail streets like Rue Saint-Honoré, also benefit the city's economy.

The city has been described 'as an object of desire, a site of prestige and a place of sartorial elegance and fashionable display' (Rocamora, 2009, p. xv). However, Paris has attributed high significance to fashion, not only as a means of cultural prestige but also of economic competitiveness. In addition to the continuation of the symbolic promotion of the city, Paris has become a key centre for the command and control of powerful luxury and fashion goods conglomerates, particularly both LMVH (which includes the fashion brands Dior, Luis Vuitton, Kenzo, Givenchy, and Marc Jacobs) and Kering (formerly PPR, which includes Balenciaga, Saint Laurent Paris, Gucci and controlling interest in Alexander McQueen, Stella McCartney). In the late 1980s and early 1990s, these fashion groups, whose strategy has drawn upon the acquisition of foreign brands and of talents from other fashion capitals, played a major role in allowing Paris to retain its dominance despite the outsourcing of manufacturing to low-cost countries (Godart, 2014). This has had a distinctive impact on the development of fashion designers, who are usually trained in large companies, while independent fashion design schools that often emphasise narrow technical skills tend to be marginalised (e.g. 'Studio Berçot', 'Institute Français de la Mode', 'L'Ecole de la Chambre Syndacale de la Couture Parisienne'). In fact, these schools do not attract the world's most talented fashion students, who tend to attend fashion schools in other major fashion cities, and are not regarded as incubators for French creative talent. In fact, Paris-based fashion houses have a record for hiring new creative professionals from educational institutions based in London and New York (Rocamora, 2009; Tokatli, 2011; BOF, 2012).

LONDON

Of all of fashion's world cities London has experienced the fullest de-industrialization and retreat from manufacturing, and the fullest shift between material and symbolic economies. As it will be pointed out in more detail in the next chapter[22], although long associated with

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[22] This analysis briefly introduces the results of the study carried out on London from a 'supply-side' perspective and presented in the next third chapter. Due to the relatively lack of studies on London as a fashion city, this section has been completed 'ex-post' to make exhaustive the analytical framework of fashion's world cities. Of course, it has not affected the main conclusions of this chapter related to the identification of the ideal types.

rich cultures of demotic and populist fashions, London's international reputation before the 1960s was primarily associated with traditions of tailored clothing. While, to some extent, the cultural developments in youth fashion of the 1960s drew upon existing networks of workshop and artisanal production in the city and established linkages between the West and East Ends of the city, they also were 'anticipations' of the new cultural economy, marked by a enhanced promotion of the image of the city (Breward and Gilbert, 2008). London has developed a reputation for a creative, conceptual approach to fashion (McRobbie, 1998), often regarded more as a form of artistic and symbolic expression than physical production. London-based designers are more risk-taking with a reputation for breaking boundaries; while a generalization, London collections are noted for originality, experimentation and idiosyncrasy, rather than wear-ability.

The education system in London is a powerful engine of the local fashion economy, and is committed to attracting highly talented international students, and producing creative and innovative talent. Local HEIs specializing in fashion design place significant emphasis on the 'creative' fashion designer, with pedagogic approaches that emphasize individual creativity, aesthetic values, and innovation. London fashion education also emphasizes symbolic aspects of the fashion process, with courses in fashion marketing, promotion, and journalism, benefitting from the city's position as a hub of CCIs. Elements of the fashion education system are also directed towards a strong relationship with retailing, rather than technical skills associated with production processes. London lacks large global fashion corporations capable of absorbing the creative talent produced locally (Burberry being the largest exception), with major retailing companies and creative industries associated with fashion more likely to employ graduates. London also now lacks a significant manufacturing sector, which is much smaller and more fragmented that that in other fashion's world cities (Pratt et al., 2012). Clothing manufacture in London declined rapidly in the second half of the twentieth century. There are some small-scale high-quality specialist firms which are more design-oriented (Evans and Smith, 2006); however, despite a recent small upturn in this activity, the sector is comparatively tiny, and is a brake on the development of a strong ecology of designer fashion start-ups and micro-enterprises. One interpretation of London's trajectory might be about a 'hollowing-out' of the fashion city; another reading is that this is the city that has moved most fully towards a version of the symbolic economy.

London fashion weeks place the city in the top level of the regular cycle of events and are regarded as the best international events to discover new trends, styles and talent. Moreover,

the success of London trained designers elsewhere has helped cement a reputation as a source of creativity to be exported to other centres (Taylor, 2005). However, other elements of London's fashion formation sit outside the conventional design and production process; London's reputation as a fashion city is strongly connected to consumption of the city as a distinctive place of fashion. In part this is about London's continuing success as a retailing centre, and its wider importance as a destination for tourism. Over time, the recognition of the importance of design and creativity has led to the emergence of many independent retailers selling quality fashion design, which has been capable of defining powerful cultural images. But London also disseminates its fashion culture as an experience to be consumed, and a strong global promotional apparatus has contributed to the communication of place-based narratives and myths. For example, London's museums have been extremely successful in staging major fashion exhibitions that emphasize London's creativity and its importance in the life-histories of leading designers, and that draw upon its fashion traditions and connections to a wider sense of its importance in popular culture.

2.2.4. Analytical models of fashion's world cities

Each of the fashion's world cities has experienced common challenges and opportunities, particularly associated with pressures on manufacturing activities, which are primarily linked to economic globalization, but also to competition for space in hyper-capitalized local property markets. However, these cities, while strongly interconnected by the institutions of fashion, especially the cycle of major collections, flows of creative staff and stylistic influences, have distinctive local characteristics and trajectories. A global value chain approach, which was already adopted in the first chapter to address the transformation of the fashion industry as a result of globalization and its current international geography, can be also adopted to discuss possible linkages, similarities and differences between the fashion's world cities. In fact, this approach may help further the understanding of how value is produced and distributed across different economic actors into various geographical areas.

These cities have long competed for the attention of international stakeholders and, overtime, have specialised and achieved different competitive advantages in the global fashion value chain. New York, Milan, Paris, and London have a broad mix of business, entertainment, and culture activities, together with strong subcultures and an environment able to inspire both fashion professionals and consumers. However, they are internationally recognised for having a peculiar and unique identity (Godart, 2014). In particular, the different approach to various

forms of fashion production seems to have highly affected the nature of these centres, influencing the entire local fashion ecosystem, the structure of the industry and the way local actors have approached the new symbolic economy for fashion. In this respect, it is possible to identify two main elements that are present to greater or lesser extent in each centre: the first element is centred on 'doing business' and focused on managerial and commercial aspects of the industry, while the second element is more oriented towards 'generating symbols' through forms of creativity, artistic expression and symbolism.

Table 2.2 attempts to systematize these differences and is organized by two variables: the first of these assesses the city's orientation towards 'material' or 'symbolic' models of fashion production, while the second assesses the extent to which specialized artisanal production remains significant in the urban economy. Each of the centres has a different position in this schema. Milan and New York tend towards what is described as more a 'material' system of fashion, and still operate (particularly in the case of Milan) through extensive production schemes. Designers are characterized by either 'entrepreneurial nature' or work within corporate structures, in both cases valuing the marketability of products more than individual creativity and forms of artistic expression. On the other hand, cities that tend towards symbolic production (i.e., Paris and London) lack a deep manufacturing base, and the fashion design industry is more disconnected from the material production of clothes, particularly beyond very specialist elite or experimental fashions. These centres hold a long-established symbolic importance in global imaginaries and the continuous promotion and reworking of narratives, images, and symbols about their global position is vital to their survival as major fashion cities. As an example, they have a stronger international reputation than Milan and New York for being major centres of fashion consumption and preeminent locations for shopping.

The relative presence of a specialized artisanal production sector affects the character of fashion training in local HEIs, as well as the nature of local fashion design and of fashion-related events. Milan and Paris, those cities with the strongest traditions of surviving artisanal production, have tended towards fashion education systems with a strong focus on technical, craft and production skills. These centres are internationally known for being the most important locations for international trade fairs in the fashion industry, organizing events like Milano Moda Donna in Milan or Première Vision in Paris. Moreover, there is a tendency for these centres to hire design professionals from outside, particularly in establishing new creative initiatives and directions. New York and London tend to act as major cities in fashion

education, pulling in a global student population and benefitting from the dominant position of the English language, while Milan and Paris, due also to their stronger consolidation in the luxury and fashion industry, seem to act more as magnets for designers looking for job opportunities in established fashion houses. This is also reflected in the nature of the fashion week event. In fact, fashion weeks in New York and London tend to be places where discovering new emerging designers, whereas in Milan and Paris the focus is more on collections from major luxury fashion brands that are based in these cities. While all four cities are homes to major global fashion corporations (with London lagging behind the others), these different formations influence the precise ways that they draw upon local talent pools, training and place-specific traditions, and symbolic significance.

Table 2.2. Key characteristics of fashion's world cities

		FORM OF PRODUCTION	
		MORE 'MATERIAL' (BUSINESS-ORIENTED) ⟷	MORE 'SYMBOLIC' (CREATIVITY-ORIENTED)
SPECIALISED ARTISANAL PRODUCTION	HIGH	**MILAN** • Extensive industrial productive sector with a long-standing tradition in ready-to-wear; • Renowned designer fashion houses supported by large number of support activities, with significant entry opportunities for new fashion professionals; • Strongly developed business model of the 'entrepreneur designer'; • Design culture with emphasis on business profits and consumers' needs rather than artistic expression and aesthetic qualities; • Specialist HEIs focusing on business, technical and artisanal skills, perceived as a weak potential source of innovative creative talent; • Limited local government support in sustaining the local fashion industry; • Use of 'brand channels' like trade fairs for promoting the competitiveness of the local industrial system through the creation of symbols; • Milan Fashion Week mostly showing collections of the main fashion design houses located in the territory.	**PARIS** • Traditional specialization in haute couture; • Long-established global tradition as source of fashion innovation and creativity; • Surviving artisanal sector, strongly linked to haute couture and high-end fashion; • Relatively limited manufacturing base and powerful fashion retail sector; • Powerful fashion and luxury conglomerates including world leading fashion houses; • Design culture with a strong emphasis on individuals and creative waves of 'star' designers; • Specialist HEIs focusing on technical and artisanal skills and perceived as a weak potential source of innovative creative talent; • Importance of the media system (both local and global) in promoting the city's symbolic status as fashion centre; • World-class fashion trade fairs that attract key players of the sector from all over the world; • Paris Fashion Week focusing more on collections from major luxury fashion brands.
	LOW	**NEW YORK** • Significant surviving localised production system increasingly specialising in samples and high-end products; • Well-developed business model of the 'entrepreneur designer'; • Design culture with more emphasis on marketable products than producing highly creative and innovative garments; • Business-oriented education system, providing courses on management, marketing and merchandising and offering the opportunity to enter the local fashion industry; • Strong corporate sector, with significant employment possibilities for designers and other creative fashion professionals; • Extensive local institutional cultural system and infrastructure supporting the designer in the creation, materialization and commercialization of fashion, as well as the dissipation of symbols and images; • New York Fashion Week showing more collections of emerging fashion talents than of established fashion houses.	**LONDON** • Fashion seen as creativity rather than physical production; • Designers often more concerned about the symbolic content of garments than the logic of the market; • HEIs with reputation as incubators of globally important creative talent; • Fashion education system focused on individual creativity, aesthetic values and experimentation rather than technical expertise, with an important secondary focus on the communication and promotion of fashion; • Absence of a solid manufacturing base connected to fashion design, and lack of opportunities for significant local production; • Limited number of elite global fashion businesses capable of absorbing the pool of creative talents, but significant cross-over into large retailing companies; • Globally significant cultural institutions involved in promotion of fashion and its associations with popular culture and place-specific traditions; • London Fashion Week regarded as a place where discovering new talent and global trends.

Sources: Author's elaboration.

2.3. 'Second-tier cities' of fashion: From physical manufacturing to symbolic production

The diversity of characteristics and trajectories of these four main centres indicates some of the limitations of thinking about a single model for the 'fashion city'. That diversity is increased if attention is paid to other cities. Fashion's urban hierarchy is not unchanging and increased academic attention has been paid to alternatives centres of fashion production, design, consumption, and culture. While the traditional fashion's world cities are still incredibly central to the geography of fashion, the reshaping of economic, cultural and social borders in a growingly globalised and interconnected[23] world has led to the emergence of new and alternative centres of fashion culture. In the last decades, a number of what some have described as 'not-so-global' or 'second-tier' cities of fashion have achieved rising visibility in the international geography of fashion (Rantisi and Leslie, 2006; Larner *et al.*, 2007; Skov, 2011). According to ESPON/SGPTD (Secondary Growth Poles and Territorial Development in Europe), 'second-tier cities' are defined as 'cities outside the capital whose economic and social performance is sufficiently important to affect the potential performance of the national economy' (2012, p. 3). The term 'not-so-global cities' seems be related to the literature on 'world cities' (Friedmann, 1986) and 'global cities' (Sassen, 1991), which emphasizes their position within broader economic and political structures. However, the existing literature on fashion cities refers to 'not-so-global' or 'second-tier' cities of fashion as new urban centres focused on fashion other than the traditional world's fashion capitals, without explicitly mentioning economic, political, social or dimensional aspects of cities.

Amsterdam, Antwerp, Bangkok, Barcelona, Berlin, Copenhagen, Dakar, New Delhi, Hong Kong, Istanbul, Jaipur, Lagos, Lisbon, Melbourne, Moscow, Nairobi, Seoul, Sidney, Shanghai, Stockholm, Toronto, Vienna, Warsaw and many others have become significant sites of fashion culture and have been placed at the core of international academic debates (Skov, 2011; Conference 'Fashioning the City', 2012; Ling, 2012). Not only cities from developed countries but also urban centres dealing with unfavourable socio-economic conditions have recently aspired to the role of fashion city. For instance, the cities of Rio de Janeiro and São Paulo in Brazil have been included as imagined locations in the international geography of fashion (Gilbert, 2000). The less rigid economic structures that usually

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[23] In a society increasingly engaged in the phenomenon of globalization, it is now possible to access fashion cultures also in remote parts of the world through advanced technological means (Beard, 2011).

characterise second-tier centres, together with the growing diffusion of the ICTs and the transformation of consumer markets, have led these cities to become influential centres of fashion (Beard, 2011; Ling, 2012).

These cities have very different economic and cultural contexts but indicate the way that fashion has become an increasingly important element in urban development strategies and in repositioning cities as attractive destinations for inward investment, skilled migrants, and tourism[24]. Fashion design has been included in a growing number of urban policies aimed at restructuring economies through CCIs and at promoting cities as 'creative' (Crewe and Goodrum, 2000; Leslie and Rantisi 2009; Paulicelli and Clark, 2009; Vicari, 2010; Segre Reinach, 2011; Boontharm, 2015). Making a city 'fashionable' has become part of a growing number of urban branding strategies aimed at creating distinctive place-based images and identities in the wider global economy (Leslie and Rantisi, 2009; Potvin, 2009; Paulicelli, 2014). The concept of the 'fashion city' has become an important factor in this global competition between urban centres appearing in the plans, policies, and promotional activities of many urban and regional governments (Breward and Gilbert, 2006). This concept of the 'fashion city' is often weakly codified and can mean very different things in different contexts.

The increasing significance of fashion design as a paradigm for local economic development, in addition to the proliferation of second-tier fashion centres in the world, have raised the essential question of what is fundamentally required to transform contemporary cities into fashion centres. Perhaps the clearest analysis of the idea of the 'fashion city' comes in Scott's discussion of factors required to move Los Angeles to 'the front rank of world fashion centres', competing directly with 'New York, Paris, Milan and London'. Scott (2002, p. 1304) suggested a number of requirements, comprising: a 'flexible' manufacturing basis; a dense cluster of specialist high-quality sub-contractors; major fashion training and research institutes; regionally-based but internationally recognised promotional vehicles, including fashion media and major fashion shows; an evolving fashion design tradition with strong place-specific elements; formal and informal connections between the fashion industry and other cultural products industries (particularly Hollywood).

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[24] In recent years, fashion and tourism have growingly converged and enriched each other through the creation of images and identities for increasing the number of visitors, investments, as well as for enhancing the reputation of contemporary urban environments (Jansson and Power 2010). A reciprocal relationship exists between fashion branding and tourism development strategies: on the one hand, a 'fashionable' tourist city can be perceived as more attractive for specialized firms and creative professionals; on the other hand, tourism experiences, which include fashion and luxury shopping in addition to cultural and creative activities, can result in a higher perception of the fashion identity of the city (Chilese and Russo 2008).

This list, however, even in 2002 seemed to look backwards towards the fashion world city formation of the twentieth century. As previously observed, these centres have shifted and developed, while alternative and newer centres of fashion have often developed only particular elements of this pathway. While fashion's world cities are exemplary in the way they have achieved a reputation for fashion, less global centres have usually fewer cultural resources, established designer fashion traditions, as well as support commercial structures (Rantisi, 2011). Thus, particularly for smaller and less central centres, the symbolic element of fashion has become a strategic factor for obtaining international recognition and attracting the interest of consumers, media and tourists, as well as investments, creative talent, and international companies (Melchior, 2011).

Looking at the relationship between fashion and cities more widely challenges straightforward assumptions that the physical manufacturing of garments has become less important than symbolic production of fashion (Kawamura, 2006). In this sense, a number of 'Potemkin cities of fashion characterised by little more than the corporatized surface sheen of fashion culture' have emerged (Gilbert, 2006, p. 30). These are primarily regarded as 'consumption spaces' with high symbolic value rather than as 'production locations' (Chilese and Russo, 2008, p. 3). As outlined in previous sections, the significance of local craft skills and flexible production, which have been central elements of fashion's world cities, has been threatened by the relocation of manufacturing towards lower-cost cities and the emergence of 'fast fashion' production systems, as well as the digitalization of long-distance supply chains (Gilbert, 2013).

Due to the erosion of manufacturing industries and the emergence of an economy focused on creativity, knowledge, and innovation, more recently, most of the attention has been paid on distinguishing cities on the basis of symbolic forms of production (Rantisi and Leslie, 2006). With the increasing indistinct and uniform nature of places in the globalised economy, cultural distinctiveness and local identity have become fundamental elements for enhancing local heritage and craftsmanship, as well as for competing globally in international fashion markets (Kawamura, 2005; Potvin, 2009; Melchior, 2011). Therefore, in contrast to traditional fashion cities originally based on extensive local manufacturing systems, new centres of fashion have been developed through the generation of attractive images and identities, which also serve for the creation of cultural and symbolic capital of cities (Berry, 2012). Hence, the idea of the fashion city has been reinvented not as a perfect replication of the established fashion's world cities (Gilbert, 2013), but as a new combination of local

cultures, identities and symbolism.

For example, the wider transformation of Antwerp into a new fashion city was not based on industry development or major trade activities around fashion, but on policies implemented to generate cultural distinctiveness and a Belgian fashion-related identity. Antwerp fashion designers were publicised as 'avant-garde' artists drawing upon an intellectual approach to fashion that was aimed at translating influences through their artistic creations (Martínez, 2007). The Flanders government implemented a city-branding strategy that prioritised media, museum initiatives, and cultural events[25] (Pandolfi, 2015). Of particular importance was the opening of the Mode Natie, a multi-purpose centre that includes the Royal Academy of Fine Arts fashion department, the MoMu Fashion Museum, and the Flanders Fashion Institute (Skov, 2011; Teunissen, 2011). Antwerp built a symbolic narrative around fashion that fed into its urban identity and was closely associated with wider cultural regeneration and gentrification (Martínez, 2007; Beird, 2011). More importantly, Antwerp has pointed towards a strategy for the development of fashion centres primarily built on the creation of place-based identities and reputation, rather than on the strengthening of local production systems. Similarly, in Barcelona, the local government has carried out a city branding process based on the promotion of fashion-related events (e.g., 080 Barcelona, Showroom Barcelona) and the development of a strong shopping-related image, with the aim of attracting fashion talent and international visitors, as well as of repositioning Barcelona in the international map of fashion centres (Chilese and Russo, 2008).

2.3.1. The development of local designer fashion industries as part of CCIs

The development of CCIs, together with the promotion of creative talent and design-intensive innovation, has been included among those elements that can enable less global cities to compete internationally in the global economy. In recent years, there has been a proliferation, development, and growth of local designer fashion industries in less global and second-tier cities (Larner *et al.*, 2007). As a result of the massive decline of traditional fashion manufacturing industry and the continuous process of de-industrialization, a rising number of national and local urban policies have paid attention to the development and strengthening of local designer fashion industries as part of broader CCIs-oriented policies, with the aim of

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[25] The cultural event 'Mode 2001 Landed-Geland' stressed the importance of Antwerp as an innovative creative city around the cultural element of fashion and contributed to the consolidation of Antwerp as a fashion city.

competing in the globalised economy and of promoting local creativity, as well as cultural distinctiveness (Godart, 2014; McRobbie, 2015). In particular, the designer fashion sector has been regarded as a key strategic factor for competing in the globalised market, thanks to the possibility of enhancing the value of domestic artisanal production and creating distinctive local identities. However, competitive pressures stemming from the globalization of production chains and the emergence of the new model of fast fashion have required the adoption of locally focused strategies to develop and sustain these types of industries in second-tier centres (Segre Reinach, 2005; Leslie *et al.*, 2014).

There are many examples of local governments' strategies, which have invested in the designer fashion sector as a means of promoting urban economic growth and cultural vitality, as well as for remaining competitive under conditions of globalization and de-industrialization (Chilese and Russo, 2008; Vanichbuncha, 2012; Hu and Chen, 2014; Boontharm, 2015). In this regard, Skov (2011, p. 144) contends that the 'rationale for governments to value such a small and fragmented sector is neither economic, nor cultural, as an inherently worthy artistic production, but a combination of the two'.

The development of 'fashion districts', which include a concentration of various activities and institutions like wholesalers, suppliers, specialist manufacturers and educational institutions, has been one of the strategies adopted to support local fashion industries, often taking as reference model the success of fashion districts in established centres like New York[26] (Harvey, 2011). In particular, applied higher education institutions are often treated as significant cultural intermediaries capable of sustaining local designer clusters, acting as a significant link between training and industry, and as a key platform for knowledge production and social interaction (Rantisi, 2002; Harvey, 2011; Rantisi and Leslie, 2015). Moreover, a 'slow fashion model', which focuses on small-scale production, artisanal techniques and local resources, as well as educating consumers about the quality of local products and production can help sustain local designer fashion industries and preserve the identity of second-tier centres (Leslie *et al.*, 2014; Aakko, 2018). In a similar vein, Rantisi and Leslie (2006) underline the significance of developing highly distinctive design capabilities for overcoming disadvantages of second-tier cities.

The development and consolidation of a fashion district has been part of the initiatives taken

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[26] The Garment District of New York includes a dense agglomeration of apparel manufacturing firms and specialised retailers, which are strongly supported by institutions such as design studios, fashion magazines, design schools, and forecasting services (Rantisi, 2004a).

by the City Council of Johannesburg in order to support its CCIs and promote the city as an internationally recognised fashion centre. More specifically, dedicated fashion-related institutions, design incubators, trade journals, training institutions, trade shows, together with the South African fashion week, have been established to support the local design industry and promote a distinctive fashion identity (Rogerson, 2006; Harvey, 2011; Corner 2014). Similarly, the city of Toronto has regarded designer fashion as a key cluster capable of contributing to its creative economy through the allocation of very significant resources to its growth and development. An important local milieu, which includes a fashion incubator dedicated to nurturing talent, the Fashion Design Council of Canada, a fashion week (i.e., World Mastercard Fashion Week), a premiere fashion trade show and fashion design schools, has contributed to supporting designer fashion in the city (Leslie and Brail, 2011; Leslie *et al.*, 2014). In the same vein, the emergence of a designer fashion sector in Berlin has been supported by the development of a bi-annual fashion week, the establishment of major fashion retailers and designer-owned fashion shops, as well as the coverage of press, media, and magazines. These elements have jointly contributed to the growth of a local fashion milieu and an independent fashion designer sector characterized by a specific urban style (McRobbie, 2013).

In some places, the local designer cluster has been a focus for different elements of the fashion formation. Besides the development of fashion design districts and clusters, governments' initiatives have included the use of specific brand channels with the aim of enhancing the value of local designer fashion industries. Fashion-related media, independent retailers (e.g., boutiques, artisanal shops), and distinctive showcase events have acted as fundamental elements for increasing the reputation and visibility of local fashion clusters. For example, in 2003, the Bangkok's local government, within a broader project (i.e., 'Bangkok: A Fashion City') aimed at transforming the city into an important fashion hub, used massive public relations campaigns and mass media to increase the designer fashion industry's image and to raise brand awareness of Thai products' quality in the world market (Vanichbuncha, 2012).

There has been a proliferation of fashion weeks. In this model as well attempting to integrate cities into the wider circuit of events, they both showcase local talent, and provide resources and networking opportunities for designers. In particular, independent trade shows and fashion weeks act as significant platforms for knowledge exchange and networking with key actors in the industry (e.g., editors, photographers, fashion bloggers), which are fundamental

activities for nurturing independent firms. For example, Australian Fashion Week provides an opportunity for Sydney-based designers to promote their work alongside better-known global brands, but also creates an arena for networking to the benefit of the local fashion design industry. This includes both international contacts, but also connects design talent to local manufacturers, retailers, wholesalers, and media. Similarly, the Portugal, Montreal, São Paulo, and Berlin Fashion Weeks are aimed not only at showcasing designer fashion talent, but also at connecting designers with other key actors in the industry such as manufacturing firms (Brandini 2009; Rantisi, 2011; McRobbie, 2013).

2.3.2. National government policies: Branding cities through designer fashion

Some cities have benefited from national government policies targeting the fashion design sector with the aim not just of economic success, but also a broader attempt to re-brand certain cities and national cultures as creative. For example, in Denmark, Sweden, New Zealand, Taiwan, and Brazil governments have implemented various targeted policies in support of national and local designer fashion industries (Melchior, 2011). In this regard, the economic success of the designer fashion industry in Denmark has been the result of a strong government support, which has placed the whole national industry under the new program of the cultural industries' policies and the 'cultural and experience economy' (Skov, 2011). At the beginning of the twenty-first century, the Danish government strongly invested in fashion design as a means of remaining competitive under conditions of globalization. Many of the initiatives have been aimed at defining a distinctive Danish fashion identity and at promoting Copenhagen as a major fashion centre. In particular, the 'Danish Fashion Institute' was created in 2005 with the aim of coordinating the prestigious 'Copenhagen Fashion Week' and of promoting Danish fashion globally (Melchior *et al*., 2011).

Equally, a significant local designer fashion industry milieu, with a strong position in international fashion markets, has emerged in Sweden drawing the increasing attention of international fashion press and magazines. More specifically, Swedish fashion-oriented policies have regarded fashion as a cultural form of expression and have promoted fashion exhibitions and University fashion programs to develop a new image based on a modern and cosmopolitan Sweden (Melchior, 2011). Similarly, the success of the designer fashion industry in New Zealand at the beginning of the twenty-first century is usually associated with the implementation of a series of national creative industries' policies aimed at supporting the local industry, nurturing place-based creative talent, promoting a national

identity and repositioning fashion in the national economy. In particular, there has been strong support for the designer fashion cluster in Auckland, but also for strategic media promotion, showcasing events like the New Zealand Fashion Week, fashion-related incubators, and training schools (Larner *et al.*, 2007; Weller, 2014).

As another example, the Taiwan's fashion industry has not a long-established history of fashion culture but was primarily based on the development of a local textile and clothing manufacturing industry, which started to decline in the 1990s due to manufacturers moving to China and Southeast Asia. Starting from the twenty-first century, the Taiwanese central government has implemented CCIs' industrial policies aimed at upgrading traditional local fashion manufacturing, promoting the fashion and textile industry and positioning Taipei as an important fashion centre. A series of initiatives including the development of the Taiwan Design Centre, the opening of department stores (i.e., Sunrise Department Store), the emergence of fashion magazines and the growth of domestic fashion shows have contributed to the development of a strong fashion identity drawing increasing international attention (Huang *et al.*, 2016). The Brazilian designer fashion industry represents another interesting example. In fact, in the last decades of the twentieth century, it was regarded as a powerful means of communicating meanings associated with the national culture and of gaining international exposure and generating economic wealth. The emergence of design-oriented clothing producers, the establishment of specialist schools and fashion-related events, as well as considerable investments in young talented designers have contributed to repositioning Brazil, and more specifically, the cities of Rio de Janeiro and São Paulo in Brazil in the international fashion imaginary (Brandini, 2009).

2.3.3. The symbolic construction of new centres of fashion culture

Besides focusing on fashion design as a CCI, some fashion strategies for second-tier cities have been centred on symbolic production of fashion and place branding. Like brands, cities satisfy functional, symbolic, and emotional needs, and narratives about cities have to include specific elements that satisfy these needs (Kavaratzis, 2004). A variety of cultural intermediaries, notably distinctive forms of local consumption, fashion-related events, and traditional and newer forms of media, have been regarded as critical for cultivating local place-based images and for branding cities as new fashion centres (Rantisi, 2011).

FORMS OF LOCAL CONSUMPTION

In the past, regional economic development and economic geography have addressed the geography of fashion primarily in relation to the location of production, paying little attention to the role of cities as sites of consumption. However, more recently, due to the large presence of indistinct and uniform places in the globalised economy, consumption has become an important means of achieving place identity and symbolic recognition. Purchasing spaces, urban amenities, and cultural districts growingly contribute to defining the image of cities (Crewe and Forster, 1993; Kawamura, 2005; Potvin, 2009; Jansson and Power, 2010). Consumption spaces, which reflect the cultural and economic processes of the city, contribute to the process of production and re-production of place-based images, meanings and myths. Nowadays, trendy retail and shopping districts, where the main fashion design brands concentrate their flagship stores and showrooms, help both to emphasize the presence of local fashion design industries and to attract sophisticated consumers and visitors (Mingfeng and Ying, 2013; D'Ovidio, 2016). Thus, the development of 'fashion consumption cities' has been regarded as a key element for the development of new fashion centres. According to Wang and Sun (2013), the presence of an industrial base, the size of the city (that is measured in terms of size of the population, land and economy), the degree of openness (that reduces external barriers to the attraction of brands, talent and consumers), the city's purchasing power (that determinates the quantity and quality of consumption) and the development of CCIs are all important factors for the promotion of urban fashion consumption.

Increasing attention has been devoted to the symbolic importance of consumption, which is a means of distinction of the new middle class. The consumption of fashion products is a regarded as a way to communicate messages about values that are embedded in the items. Nowadays, consumers value more unique, individualised, and personalised consumption experiences, which help the constitution of personal identity, than the fashion product itself. Local forms of retail, where relatively small and independent retailers sustain a viable independent fashion culture, have been regarded as a strategic factor for promoting second-tier fashion cities (Gilbert, 2000). In this respect, independent boutiques offering exclusive 'designer' products can be important cultural intermediaries to build up local identities and shape the fashion experience of cities (Rantisi, 2011). Thus, in recent decades, new shopping centres or 'fashionable quarters' have emerged in decaying industrial areas, drawing upon low rents and highly symbolic cultural associations (Bovone, 2005). As an example, the Nottingham Lace Market has transformed an industrial space into a new cultural centre and

retail quarter by merging local production with the consumption of design-oriented, customised, and high-quality garments that are sold in a range of small and independent stores (Crewe and Forster, 1993).

FASHION-RELATED EVENTS

Fashion-related events like fashion weeks, trade fairs, and festivals also function as means of strengthening the relation between 'first-tier' and 'second-tier' centres and of re-branding cities as fashion centres, through the creation of significant symbols linking fashion to urban space (Gilbert, 2006; Chilese and Russo, 2008). These events are usually organised by local government agencies and local institutions, which play a fundamental role in the viability of fashion cities. According to Kawamura (2005, p. 45), institutions 'reproduce the image of fashion and perpetuate the culture of fashion in major cities, such as Paris, New York, London, and Milan (Kawamura, 2005, p. 45). In this model, independent fashion weeks serve less to promote local design, than to promote the city as a place of fashionable consumption plugged into the international order. They play a key role in defining and communicating place-based images and identities in cities that do not have strong roots in fashion production (Kawamura, 2005; Ling, 2012). The establishment of independent fashion weeks has become a crucial element for those less global cities that aspire to appear in the international fashion map. In this sense, they contribute to attracting high levels of investments and tourism, with a significant impact on local economies in terms of wealth[27] and employment (Skov, 2011; Ling, 2012; Pratt *et al*., 2012). Since the turn of the century, an increasing number of less global cities of fashion (e.g., Amsterdam, Beijing, Berlin, Cape Town, Casablanca, Copenhagen, Lagos, Jakarta, Moscow, Nairobi, Oslo, Pakistan, Tunis, Kuala Lumpur) have established their own fashion weeks, not only to raise interest in local designer fashion industries, but also to enhance their reputation as new fashion centres (Arrigo, 2011; Beird, 2011; Ling, 2012).

For example, the Australian fashion week's (AFW) has been regarded highly important to reinvent the image of Sidney (Weller, 2008). The local government has defined this event as a generator of place branding and urban renewal capable of disseminating powerful messages about Australian creativity and, in turn, of generating direct and indirect economic benefits. Also, the establishment of the New Zealand Fashion Week has contributed to reinforcing the

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[27] Each fashion event contributes to an international entertainment network, where the economic value of each event is enhanced by similar events in other places (Weller, 2008).

status of Auckland as a fashion hub, attracting international media and buyers, as well as other related activities in the clothing commodity chain (Larner et al., 2007). In a similar vein, the L'Oreal Melbourne Fashion Festival (LMFF), which is a public commodity fair held in Melbourne to open the autumn retail fashion sales season, is aimed at connecting retail fashion with cultural events 'in a way that reinforces the discursive construction of Melbourne as a stylish and cosmopolitan city of fashion (Weller, 2013, p. 2858). This large event, which includes fashion shows, social and cultural events and business seminars, contributes to the creation of both the fashion industry's value and the symbolic capital of the city (Weller, 2013).

TRADITIONAL AND NEW FORMS OF MEDIA

Together with independent fashion-related events, a broad range of media including newspapers, magazines, televisions, critics and editors act as important cultural intermediaries for the global dissemination of local narratives about fashion, as well as for the construction of a symbolic image for cultural products, industries and cities (Rantisi, 2004b; Kawamura, 2006; Rocamora, 2006). In particular, fashion press has the power to strengthen the relationship between fashion and urban culture, between symbolic goods and fashion brands, as well as between city images and fashion (Knox, 2011). The capability of capturing the attention of international press plays a significant role in promoting and making second-tier cities of fashion attractive to tourists and consumers (Skov, 2011). For example, there are numerous national editions of Vogue, whose content focuses on local designers and events from new emerging cities of fashion (Gilbert, 2013).

In addition to traditional forms of media, online communication (e.g., social media blogs), which is characterised by an immediate connection with the public, has emerged as a new powerful means of promoting meanings about cities and fashion (Pratt et al., 2012). Moreover, some studies have pointed out the role of museums as new fashion media, which contribute to the distribution of information concerning contemporary fashion systems (Anderson, 2000). In fact, fashion has become more and more placed within museums and art galleries, through a mutual relationship between art and fashion that strongly contributes to supporting local designer fashion industries and to creating and dissipating local identities (Taylor, 2005; Santagata *et al.*, 2009). In the last decades, many local museums have become explicitly dedicated to fashion, a rising number of fashion houses (e.g., Prada, Gucci) have used museums and artistic venues for the presentation of their collections, and a growing number

of creations of fashion designers have been displayed in temporary and permanent museums' exhibitions (e.g., in the Victoria and Albert museum in London) (Duggan, 2001; D'Ovidio, 2010).

2.3.4. Global connectivity and place branding

There is also importance in emphasizing connection to fashion's world centres, and the established order of fashion; at one extreme, a fashion city of this kind is an empty consumerist outlet for global brands, marked with the patina of distant fashion world cities. Thanks to the development of modern communication technologies, which allow an instantaneous diffusion of images and information, it is now possible to access and promote fashion cultures from everywhere, without limitations of physical proximity (Beard, 2011). Thus, second-tier cities, in order to convey the 'fashion city' status and to overcome difficulties associated with creating symbolic capital, have aspired to be connected to and have variously appropriated narratives and symbols from fashion's world centres (Berry, 2011). In this respect, firms and designers from emerging fashion centres have attended fashion-related events or opened flagship stores in major cities of fashion, and have also included symbolic connections to New York, Milan, Paris and London within their branding strategies (Gilbert, 2006; Hauge, 2006).

The 'global connectivity', which links the local to the global, has become a key competitive factor to access international markets in an increasingly globalised world (Skov, 2011). New York, Milan, Paris, and London are regarded as world tastemakers, and cultural producers have growingly aspired to be symbolically associated with them in order to enhance their cultural capital (Knox, 2011). For example, the city of Auckland in New Zealand has revamped its international image by establishing symbolic connections with London and New York, which has in turn resulted in additional investments and increased tourism (Lerner *et al*., 2007). Many other cities from different countries (e.g., Australia, Denmark, Holland, Norway, Portugal) have positioned themselves as empty recipients for influences deriving from fashion's world cities (Skov, 2011).

Symbolic significance and reputation of certain cities may develop through the success of a small group of local designers working in major centres elsewhere (McRobbie, 2013). For example, the rise of Tokyo in the 1980s can be associated with emergence of a group of innovative and successful Japanese designers particularly 'The Big Three': Issey Miyake,

Yohji Yamamoto, and Rei Kawakubo of Comme des Garçons. These designers moved to Paris to present an unconventional and extreme style based on a combination of Japanese and Western elements. The success of these Japanese designers in Paris, as well as the French and global recognition, strongly affected the perception of Tokyo as a fountainhead of creative fashion talent and as a new fashion capital in the world (Kawamura, 2006). Similarly, the Belgian designers known as the 'Antwerp Six', graduating from the city's Royal Academy of Fine Arts in the early 1980s, promoted their collections in London and Paris to build their reputation and demonstrate a cohesive identity connected back to their home city. Antwerp has never established a successful independent fashion week but has continued to promote its identity using the major fashion cities as platforms (Martínez, 2007; Pandolfi, 2015). Such strategy has been emulated by other fashion designers from second-tier centres, such as Amsterdam, Barcelona, Berlin, and Copenhagen, with the aim of achieving international recognition as new cities of fashion (Beird, 2011).

Additionally, some cultural industries' actors, including fashion designers, may use 'city brands' at the centre of their branding strategies with the aim of creating self-identity and reputation (Bellini and Pasquinelli, 2016). They have a strategic interest in portraying the city in a positive light (Santagata et al., 2009) and generate place-based associations, promoting the status of the fashion city (Jansson and Power, 2010). In this sense, there exists a mutual relationship between the designer fashion system and the city, which support each other through reciprocal branding strategies (Williams and Currid-Halkett, 2011). For instance, several designer fashion firms have used the fashion city narrative for their labels (e.g., DKNY Donna Karan New York, L'Oreal Paris), products' names (e.g., perfume 5th Avenue' by Elizabeth Arden), or background of advertising campaigns (e.g., YLS, Dior, Burberry). Thus, on the one hand, these brands obtain spatial meaning and enhance their reputation in global markets. In particular, the material consumption of garments gives people a sense of place identity (Crewe and Goodrum, 2000): 'people desire goods associated with particular places because they want, at a distance, the place itself' (Molotch, 1996, p. 229). On the other hand, such relationship promotes the desirability of the city as a fashion object, perpetuating the status of the fashion city (Rocamora, 2009; Gilbert, 2013; Skivko, 2013). In this context, physical 'made in' geographical associations are commonly used as strategic tools in the increasingly globalised fashion industry. 'Paris fashion' is one of the most distinctive brand images in the modern history (Gilbert, 2000). At national level, 'Italian fashion' and 'Made in Italy' are powerful brands that are mainly associated with high-quality, aesthetic excellence

and craftsmanship of fashion products that are manufactured in Italy (Bettiol et al., 2009; Paulicelli, 2014; Bettiol, 2015).

However, with the erosion of geographical boarders due to advanced communication and media systems, positive city images have been also built through immaterial place-based associations (Power and Hauge, 2008; Pasquinelli, 2013). In recent years, a number of studies, notably from international marketing and economic geography, have shed light on positioning the value creation outside the real geographical boundaries and the location of manufacturing. According to this idea, the brand's origin overcomes the narrow geographical focus of the 'made in'. It becomes associated with the 'place' where the brand is symbolically perceived to belong for the creation of immaterial value (Pasquinelli, 2013).

Thus, nowadays, fashion firms' branding strategies may use place-product associations without any real material connection between the place and the location of production. For example, in the nineties, thanks to the designer Tom Ford, the Gucci brand borrowed the positive city image of Los Angeles linked to its powerful film and entertainment industry, as well as the associated 'monopoly rents' without being located there. Through the 'enhancement of the reality', which refers to the process aimed at building a myth around a symbolic and perceived geographical association of products, the Gucci brand was imagined as a way to consume the 'lived experience' of Los Angeles. Such strategy has given rise to a lively debate in the field of economic geography, which proposes an unbounded conceptualization of places that can be enhanced by creative people not blocked into the reality, such as fashion designers (Tokatli, 2013).

The association between place and products 'tends to be self-reinforcing over time because both of them are joined together in a spiral of mutual interdependencies built upon the creative reprocessing of old images and the continual addition of new ones to local repertoires of designs and symbologies' (Scott, 2010, p. 124). In particular, both material and symbolic place-based associations are able to stimulate the accumulation of symbolic capital of cities and to increase the global reputation of fashion centres (Jansson and Power, 2010; Pasquinelli, 2013).

2.3.5. Contrasting models for the development of 'second-tier cities' of fashion

Drawing upon the analysis presented in the previous sections, it is possible to identify two broad tendencies within strategies to develop and promote new fashion centres. Table 2.3 indicates the main features of these two development strategies. The first of these is focused on fashion design as a form of CCI and draws upon notions of urban creative clusters. In this respect, the development and strengthening of local designer fashion industries within broader CCIs-oriented policies has represented a means of competing in the globalised economy, promoting local creativity, and cultural distinctiveness. The development of 'fashion districts', which include a concentration of various activities and institutions in support of designer fashion industries, has been one of the strategies adopted to support local fashion industries. HEIs have been often treated as significant cultural intermediaries capable of sustaining local designer clusters. Moreover, in this model, fashion weeks attempt to integrate cities into the wider circuit of events and they both showcase local talent and provide resources and networking opportunities for designers.

However, there are examples of other second-tier fashion strategies that focus less on fashion as a CCI, and more on place branding and symbolic production. In this second model, events like fashion weeks serve less to promote local design, than to promote the city as a place of fashionable consumption plugged into the international order. More specifically, they play a key role in defining and communicating place-based images and identities in cities that do not have strong roots in fashion production. Moreover, local forms of retail, events, and media have been regarded as a strategic factor for promoting second-tier fashion cities and sustaining a viable independent fashion culture. There is also importance in emphasizing connection to fashion's world centres and in using the city image within broader industry branding strategies.

Table 2.3. Contrasting models for the development and promotion of 'second-tier cities' of fashion

Development patterns	Models for development and promotion of 'second-tier cities' of fashion
Designer fashion industry-led production	✓ **Development and strengthening of local designer fashion industries as key feature of CCIs by:** • Fashion 'clusters' focused on design, but with strong linkages to local specialist producers, and supporting intermediaries and institutions; • Establishing fashion-related institutions and incubators for designer fashion talent, with strong investment in specialist education institutions, with emphasis on distinctive design for production; • Promoting the local production of high-value garments; • Showcasing events such as local exhibitions, trade shows and fashion weeks, with focus on local talent and products; • Implementation of public relations campaigns and media coverage around local fashion; • Promotion of fashion retailing highlighting local products and distinctiveness, particularly boutiques and designer-owned fashion shops.
Symbolic production of fashion	✓ **Development and strengthening of place-based identity and reputation** (relatively independent of local design and production sectors): • Promotion of fashion-related events and independent fashion weeks, showcasing leading international fashion; • Capitalisation on success stories of 'star' local design talents – these will have 'proved' their talent in other contexts, particularly a 'fashion world city'; • Local HEIs emphasise 'avant-garde' experimental or highly aestheticized fashion, seeking to produce highly distinctive talents; • Promotion of urban scene in international fashion media and increasingly social media; • Permanent, temporary and touring fashion-related exhibitions in museums and cultural centres; • Promotional emphasis on connection to fashion's world centres; • Encouragement of retail sector and tourism featuring both international brands and a distinctive consumption experience of smaller specialist boutiques embedded in up-market districts or urban villages, with associated cultural consumption experiences.

Sources: Author's elaboration.

2.4. The development of urban fashion formations through new manufacturing synergies

These two models do not exhaust the potential for new fashion formations in the twenty-first century. In fact, looking more widely there are also possibilities for new urban fashion formations associated with the new geographies of manufacturing. Changes in the nature of fashion's world centres, but also more generally in the geographies of fashion production have created new opportunities for some cities associated with manufacturing. As discussed in the previous chapter, it is now possible to see the potential for the development of new

kinds of fashion city, where the impetus comes not solely from top-down booster strategies and CCIs, but through the development of fashion innovation in the context of expanding manufacturing and hybridities between production for global markets and local cultural forms. Massive growth of cities and particularly of new consumer markets in China, South and South East Asia and Latin America, have created the possibility for the kind of synergies between consumer demand, creativity and entrepreneurialism that were a feature of the past development of fashion's world cities. For example, Shanghai, which focused on an extensive production system that serves the largest markets in the global current scenario, has recently emerged as an important fashion centre (Breward et al., 2004).

The Business of Fashion and McKinsey & Company, in their *State of Fashion* report for 2017, discuss the increasing centrality of 'urban engines' for the global fashion economy, and the way that 'a new class of rapidly growing wealthy cities in newly influential markets are becoming central to the evolution of fashion' (2016, p. 13). They predict that cities including Shanghai, Mumbai and Beijing will enter the very top ranks of fashion consumption, but also that other large and rapidly expanding Chinese cities with burgeoning middle-class markets, such as Chongqing, Tianjin, Guangzhou and Shenzhen will also become globally significant for shopping. What is less certain is that these places will develop complex, cross-sectional fashion economies and cultures that connect large-scale manufacturing with design innovation and strong cultural institutions. There is perhaps more possibility of such connections in more open and culturally diverse contexts; in Latin America for example, the growth of the clothing manufacture sector has provided a stimulus for local designers, and the region has growing fashion events not just in Brazil and Mexico, but also in Buenos Aires, Santiago and Lima.

The rapid decline of manufacturing in fashion's world cities has also allowed other cities in Europe and North America to move into a remaining segment in the physical manufacturing of garments. In particular, these cities have relied on quality, distinction, or craftsmanship of their fashion production as a basis for achieving international reputation as new centres of fashion. For example, while New York has evolved into a design-oriented fashion centre facing a dramatic decline in its traditional clothing manufacturing industry, Los Angeles has developed a new powerful fashion industry with a strong advantage in apparel production. For most of the twentieth century, New York was the most significant hub for clothing production in the US, both in terms of jobs and establishments. Since the 1980s, Los Angeles has developed an important niche in casual sportswear and has overcome the manufacturing

'primacy'[28] of New York. Such growth has been supported by initiatives of local government and trade associations aimed at sustaining the clothing industry in Southern California and at promoting Los Angeles as a new hub of cultural-products industries. In addition, the establishment of educational institutions oriented towards developing technical, production, and business skills, such as the Los Angeles Trade Technological College and the California Design College, has nurtured a high-skilled workforce. Therefore, nowadays, these centres have achieved the status of fashion cities in two different parts of the industry: New York has become a design-oriented fashion city, whereas Los Angeles has emerged as a new distinctive and alternative manufacturing fashion hub (Scott, 2002; Williams and Currid-Halkett, 2011).

There are also interesting contrasts between Milan and Florence. Florence has a long-term reputation for fashion, notably for its internationally known manufacturing cluster, alongside its global significance in culture, arts and for tourism. Since the 1970s, Milan has been considered better suited than Florence to maintain the prestigious role of Italian fashion capital, due in large part to its strong textile and clothing manufacturing system, internationally acknowledged designers (e.g., Armani, Versace), design-based cultural traditions, and an important fashion media system that heavily supports its status (Segre Reinach, 2006). Although Florence has historically lost its prestigious and central role in fashion, over time, an internationally acknowledged manufacturing system specializing in the production of leather goods and supported by a local concentration of skilled craft artisans, has continued to be regarded as a fundamental component of the Florentine economy (Randelli and Lombardi 2014).

Thanks to this powerful manufacturing system and its internationally acknowledged craftsmen, a considerable number of fashion houses (e.g., Gucci, Salvatore Ferragamo, Emilio Pucci) has been able to thrive and achieve an outstanding international reputation for the uniqueness, distinctiveness and craftsmanship of their products (Bellini and Pasquinelli, 2016). Moreover, a network of excellent fashion education centres (e.g., Polimoda, IED, Alta Scuola di Pelletteria Italiana), a globally renowned institution dedicated to the promotion of trade fairs (i.e., Pitti Immagine) and a famous fashion district including luxury flagship stores and traditional artisanal workshops have contributed to emphasising the importance of the local fashion industry.

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[28] Los Angeles overtook New York fashion manufacturing in 1998 (Williams and Currid-Halkett, 2011).

Recently, Milan's drift towards symbolic production (although it remains perhaps the most connected to manufacturing complexes of the four world cities) has allowed Florence to further raise its international reputation as a world's fashion city, which is still mainly renowned for its fashion manufacturing industry. There is also evidence of collaboration between the two cities in strengthening the visibility and prestige of Italian fashion in the world (Segre Reinach, 2006). The fast rise of Florence in the Top Global Fashion Capital Rankings (GLM, 2015) - from the 31st to the 11th position in just 4 years (2011–2015) - is further proof that Florence is experiencing a rebirth as a manufacturing-driven world's fashion centre (Lazzeretti et al., 2017).

2.5. Using Weberian ideal types to unpick the nature of the fashion city

There is then very significant diversity in the nature of cities where fashion is an important element of the local economy and the wider images and reputation of the city. Any notion that there is a single formation that can be described as 'the fashion city' flies in the face of evidence about both the historical trajectories of major fashion centres, and the range of new existing cities. In particular, the above analyses have shed light on the multiple and different characteristics of traditional and newer fashion formations in terms of contemporary features, historical trajectories and patterns of development. Thus, the idea of the singular fashion city needs to be replaced by an analytical framework that recognizes different models, but that also allows for thinking about the historical trajectories of different cities and their interrelationships in a wider system.

One way of approaching this is to draw upon the analytical tool of the 'ideal type' as proposed by the German sociologist Max Weber (1864-1920). The ideal type theory was elaborated in his work 'Objectivity in Social Science and Social Policy' (*1904 [1949]*). Weber described ideal types as mental constructs, formed by 'one-sided accentuation' of key elements into a 'unified analytical construct', that do not correspond directly to existent or historical case studies, but which enable critical comparisons and discussion of developmental paths. The formulation of the ideal type requires a deductive approach, which begins with the analysis of the general, synthetises the information down and then builds the analytical construct. It is an analytical model constructed from the observation, analysis, accentuation, abstraction, and combination of typical characteristics, features, or traits considered significant to a variety of phenomena in order to conduct comparative analyses. Thus, the

identification, emphasis, and exaggeration of patterns, regularities, and similar elements among social phenomena lead to the formation of the ideal type construct. However, it is an abstraction that only hypothesizes certain qualities or characteristics of the phenomenon under investigation. While ideal types never correspond exactly to reality, these are hypothetical constructions formed from existing facts, which have considerable analytical power and may help investigate and analyse phenomena that are found in the reality.

'*Substantively, this construct in itself is like a utopia, which has been arrived at by analytical accentuation of certain elements of reality (...). An ideal type is formed by the on-sided accentuation of one or more points of view and by the synthesis of a great many diffuse, discrete, more or less pre- sent and occasionally absent concrete individual phenomena, which are arranged according to those one-sidedly emphasized viewpoints into a unified analytical construct. In its conceptual purity, this mental construct cannot be found empirically anywhere in reality. It is a utopia'* (Weber 1904 [1949], p. 90).

Over time, social scientists have drawn upon this construct as a useful analytical tool to conceptualize a huge variety of social or economic phenomena and to make possible comparisons among them. Originally, Weber identified ideal types that refer to phenomena rooted in specific historical periods and cultural areas like the 'Western city', the 'protestant ethnic' or 'modern capitalism', or to concepts that may be found in a variety of historical and cultural contexts like 'bureaucracy' or 'feudalism'. Other examples of ideal types are related to particular kinds of behaviour like those actuated by purely economic motives (Coser, 1977). Since then, the ideal type approach has been adopted by a huge variety of disciplinary fields, including economics, sociology, psychology, history, philosophy, education, political studies, urban studies, and so forth.

In particular, the ideal type construct has been used for comparative investigation of cities over time and space. In the Weber's study 'The City' (1922 *[1978]*), the Western city was posited as an ideal type in contrast with the Oriental city. Similarities and differences among examples of Western cities in different periods and regions of the world were then identified. According to Weber, an urban community was defined by the presence of some essential characteristics (e.g., a fortification, a market, a law code and court system), that Oriental cities rarely achieved. More recently, the 'Fordist city', 'post-Fordist city', 'industrial city', 'global

city', 'cultural city', and 'creative city' have been regarded as theoretical models or ideal types of cities. Analysing cities using Weber's ideal types requires a degree of caution since no cities exactly correspond to ideal types. However, these constructs, which draw upon the essential characteristics of urban centres, may provide an important frame of reference for the study of a given city (Hutter, 2015).

In the context of this study, ideal types highlight key formations of the relationship between fashion and the urban. More specifically, they draw upon the above discussion on the complexities of fashion's world cities and the diversity of experience of second-tier cities of fashion. These ideal types are constructed through the analysis, abstraction, and combination of key elements of established and newer fashion centres. More specifically, ideal types are formed by the 'exaggeration' of some key elements of distinctive urban fashion formations. From the previous analysis of fashion's world cities and second-tier cities of fashion, it is possible to identify some key dimensions, which are common to fashion city formations and comprise 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'. Working with these, identifying similar patterns and features of these dimensions in fashion city formations as well as giving them 'one-sided accentuation', moves analysis towards three ideal types: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city.'

2.5.1 Weberian ideal types of the manufacturing, design and symbolic fashion cities

The three ideal types focus on a different segment of the fashion industry: the manufacturing fashion industry, designer fashion industry, and symbolic fashion industry. Moreover, they have different essential features for the dimensions under investigation: 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system' (Table 2.4). It is important to point out again that these features have been exaggerated to build the three ideal types, which do not correspond fully to any existing or historic formation; indeed, all examples discussed have some elements of each model. For example, the major fashion centres have combinations of these types, but also have historic trajectories that move the cities towards one or other of these types.

Firstly, the 'manufacturing fashion city' has an economic system focused on an extensive apparel productive sector, where variants may include mass production systems and flexible

workshop-based economic models. Human capital is concentrated in established production-related skills and in a supply of low-cost production labour. A key element of human capital is the figure of the 'entrepreneur designer'; an ideal-type of this figure gears all design to the logic of production and marketability of products. Other designers have technical roles in the production process, although there may be possibilities for independent design talent to look for potential synergies with local manufacturers to make distinctive fashion forms. The fashion education system is based on technical and production training, supplemented by managerial and business courses. The local institutional infrastructure is organized around networks of suppliers, manufacturers, wholesalers, and buying offices, focused on the materialization and commercialization of the city's fashion products. The promotional media system in which fashion weeks and other events act primarily as trade fairs is aimed at promoting the output of the local production system. The retail environment is relatively disconnected from the production system, but retailers actively promote local products.

The second ideal type, the 'design fashion city' is closest to conventional models of the CCIs and to the idea of the 'creative fashion city' discussed in the previous chapter. The central element of the local economic structure is the designer fashion industry, often strongly geographically concentrated in a distinctive cluster (where it may overlap spatially with other CCIs). Locally-based production is focused on support for design, particularly the making of samples and high-quality short runs; this may be a development of a traditional artisanal sector or a newer technologically-advanced specialists and may be physically co-located or close to the designer cluster. Human capital is principally expressed in design creativity, supported by skills in specialist production. Designers combine commercial sensibilities with a commitment to distinctive, place-specific fashions. The education system is strongly focused on the design process, with supporting training in logics of creative entrepreneurialism. The institutional infrastructure supports the distinctiveness of local design, and there may be important synergies with other CCIs in the city, as well as a creativity-orientated urban milieu. The promotional media system is orientated to constructing, disseminating, and celebrating distinctive place-based design characteristics and traditions. Fashion weeks and other events showcase local designers, and there is an emphasis on the embeddedness of key local figures in fashion design. The retail environment strongly features independent local designer shops and boutiques promoting a range of local designers.

Finally, the 'symbolic fashion city' ideal type has a radically different economic structure in which the production of apparel and even the design of clothing for production are absent or

very limited. Instead the city itself is sold as a site of fashion and commodifying the experience of the city becomes a primary economic activity. Human capital is concentrated in image-producing activities such as fashion journalism, photography, event organization, place-promotion, but also higher education and museum curation, as well as fashion retail. The 'symbolic fashion city' may become a centre for fashion bloggers and emergent strategies for marketizing the experience of place-based fashionable living. The educational system aims to produce designers who demonstrate artistic creativity, radical innovation and originality; international students are attracted to courses because of this.

Designers are regarded as 'artists', using a conceptual approach to fashion based on artistic expression and aimed at translating influences through artistic creations. Fashion training also focuses on the symbolic industries, and on activities that directly promote place-based associations. The institutional infrastructure, particularly fashion events and fashion-related exhibitions are ends in themselves, generating tourism and wider coverage of the city's fashion culture, rather than promoting local products or selling the clothes of local designers. Retailing is a core component of this formation; the 'symbolic fashion city' has a strong presence of global brand stores, often signalled as 'flagships' selling an exclusive or extended range; it may also have retailers that trade on place-based meaning, potentially mining older cultural associations of the city, including those connected to past traditions of actual fashion production and design.

Table 2.4. Weberian ideal types of fashion cities by dimension

IDEAL TYPES / DIMENSIONS	MANUFACTURING FASHION CITY	DESIGN FASHION CITY	SYMBOLIC FASHION CITY
ECONOMIC STRUCTURE	Extensive apparel productive sector including mass production systems and flexible workshop-based economic models	Presence of a local independent designer fashion industry often geographically concentrated in clusters	Production of apparel and the design of clothing absent or very limited
HUMAN CAPITAL	Figure of the 'entrepreneur designer' primarily interested in the logics of production and products' marketability	Creativity-oriented designers supported by skills in specialist production	Human capital concentred in image-producing activities (e.g., event organization, fashion retail) and designers regarded as 'artists' with a conceptual approach to fashion
EDUCATION SYSTEM	Education system based on technical and production training as well as managerial and business courses	Specialist HEIs strongly focused on the design process, with supporting training in logics of creative entrepreneurialism	Training courses focused on the symbolic industries and on activities that promote place-based associations
INSTITUTIONAL INFRASTRUCTURE	Network of suppliers, manufacturers, wholesalers and buying offices focused on the materialization and commercialization of the city's fashion products	Institutional infrastructure aimed at supporting the distinctiveness of local design, with important synergies with other CCIs in the city	Local institutions primarily engaged in the promotion of fashion retailing, showcasing events, and cultural or fashion-related exhibitions
PROMOTIONAL MEDIA SYSTEM	Fashion weeks and other events (e.g., trade fairs) aimed at promoting the output of the local production system	Trade fairs, independent fashion weeks and local media coverage that showcase local designers and construct, disseminate and celebrate distinctive place-based design characteristics and traditions	Fashion-related exhibitions and fashion events generating tourism and wider coverage of the city's fashion culture
RETAIL ENVIRONMENT	Retail environment relatively disconnected from the production system, but retailers actively promote local products	The retail environment is aimed at featuring independent local designer shops and boutiques promoting a range of local designers	Strong presence of global brand stores and of independent retailers offering exclusive designers' products that disseminate place-based meanings

Sources: Author's elaboration.

2.5.2. Placing fashion city formations in the 'ideal-types' framework

As already explained, these ideal types are only hypothetical constructions that do not correspond exactly to the reality and there are necessarily no pure examples of these models in existing or historic cities. The essential elements that make these three models do exist in the real world but are not all present in the same city. These ideal types are an empirical possibility, but it is unlikely that they would become a concrete reality in their totality in one

place. However, this analytical framework helps identify differences and historical trajectories between cities, and also focuses on the relationships between different urban centres. In fact, one helpful aspect of this typology is that it gives a distinctive and additional analytical framework for thinking about fashion cities, that both complements and extends the now very familiar division between fashion's world cities and 'second tier' fashion centres. Thus, this framework can be used as a heuristic device to think about the characteristics of fashion cities, and to provoke debate about their qualities and future development paths.

Figure 2.1 is intended to do just that. It is a diagrammatic representation of actual cities in relation to the three ideal types suggested. It treats the ideal types as the corners of a ternary diagram, and plots fashion city formations in terms of their tendency towards each of these. The closer a city to each corner, the more closely it fits that ideal type. The figure is intended as a heuristic device to think about the characteristics of fashion cities. The positions of cities in the diagram are not objective finely calibrated but do indicate broad patterns. Moreover, fashion cities at different points in time may occupy different positions and also tend towards diverse ideal types. Thus, the important question arises of what metrics can be used to plot fashion city formations and to look at historical trajectories in the ideal types diagram. Drawing upon the analysis of fashion's world cities and second-tier cities of fashion, the below diagram suggests positions for twenty-first century cities, but also proposes historical trajectories for the four main world centres discussed earlier in the chapter. It is only a first attempt to position fashion cities in the diagram. In fact, the aim of this chapter is to propose a framework of reference for analysing the main characteristics of fashion centres, and the understanding of what methods can be used to plot cities in this framework is further discussed in the conclusions and next chapters.

Generally, over time, fashion's world cities have shifted from 'manufacturing' to 'design' or 'symbolic' fashion cities, which increasingly rely upon lower-cost cities in the world for producing fashion garments. Instead, they usually focus on design-based, image-producing, and high-value activities, which allow these cities to build symbolic capital and remain competitive in the international geography of fashion. On the other hand, changes in the nature of fashion's world centres have created new opportunities for some cities in Europe and North America (e.g., Florence, Los Angeles), which are mostly associated with physical production of garments, to emerge as alternative new 'manufacturing' fashion hubs. Also, cities in more peripheral geographical contexts (e.g., Mumbai, New Delhi, Lagos, Hong Kong, Shanghai), which are internationally acknowledged for being low-cost hubs for apparel and

textile manufacturing, can be regarded as fashion cities that still mainly focus on physical production of fashion. Furthermore, in more recent years, new fashion cities closer to the 'design' ideal type or to the idea of the 'creative fashion city' (e.g., Johannesburg, Toronto, Berlin) have emerged, originating notably from broader CCIs-based policies aimed at developing and strengthening local designer fashion industries. Lastly, current economic trends have led to the emergence of fashion centres tending towards the ideal type of the 'symbolic fashion city' (e.g., Antwerp, Barcelona, Auckland), which have primarily relied on forms of symbolic production and place branding initiatives to establish themselves as new urban fashion formations.

Figure 2.1. Weberian ideal types of fashion cities

2.5.3. Do Asian fashion cities differ from Western centres of fashion?

When addressing typologies of fashion cities in the world, it is worthwhile to question whether there exists any particular difference among fashion cities located in Western and Asian countries. As largely observed earlier in the text, a group of cities in Western countries (i.e., New York, Milan, Paris and London) have been traditionally recognised as fashion's world cities. In particular, the emergence of these centres specialised in fashion was not entirely disconnected from their strong economic and political position within international global networks (Beard, 2011). With the advent of globalization, and particularly following trade liberalization, these cities have gradually relocated manufacturing processes to lower-cost cities, most of them located in Asian countries. Thus, many Asian cities have begun to enter the apparel value chain as suppliers of leading firms located in Western countries. A learning process resulting from this collaboration has allowed them to move towards higher-value activities in the global value chain and, recently, to become acknowledged cities of fashion consumption. As a consequence of their peculiar formation, which has mostly been the result of a slow process of upgrading of a fashion industry strongly focused on apparel and textile manufacturing, these cities tend to differ from other fashion cities that are located in the Western context.

With the exception of Tokyo, which is now considered the Asian fashion capital and has now developed its own fashion identity, other cities like Taipei, Seoul, Shanghai, Beijing, Hong Kong have struggled to emerge as new fashion centres because of their strong reputation in garment manufacturing and the lack of specific local fashion cultures (Gilbert, 2006). In fact, the most distinctive feature of Asian fashion cities relies upon the strong adoption of 'Western' elements into the symbolic promotion of these centres. Still nowadays, Western culture influences all the elements behind the promotion of Asian fashion centres like production, consumption and cultures. Generally, Asian fashion designers tend to move to Western cities in order to attend prestigious fashion schools[29] or to achieve recognition in the global industry. In particular, there exist strong linkages between the Asian and Western fashion education sectors. On the one hand, Asian fashion schools have growingly sought to generate connections with Western educational institutions. In fact, some of the main fashion's world schools like the London College of Fashion or Polimoda in Florence have established

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[29] The University of the Arts London, which includes both the London College of Fashion and Central Saint Martins, has witnessed over 100% increase in the number of Chinese students in the period from 2009 to 2014 (London Evening Standard, 2014).

important collaborations with education centres located in Asia (Fernandez-Stark et al., 2011; Bellini and Pasquinelli, 2016). On the other hand, an increasing number of leading Western fashion schools like Parsons School of Design have opened branches in Asian countries, like China and India, to meet the rising demand of local students who wish to specialize in fashion.

Western brands dominate the Asian fashion design industry and Asian consumers aspire to buy Western fashion, which is a means of being identifying with modernity (Kawamura, 2006). Asian fashion magazines like Vogue China focus on Western advertisement and images of Western models as a means of connecting Asian readers with the Western culture. Particularly thanks to the rising purchasing power of a growing and more affluent middle class, as well as a profound process of urbanization and industrialization, many of these cities like Shanghai and Beijing are developing more and more into important centres of fashion consumption (Gereffi, 2010). Furthermore, recently, several Asian fashion styles, trends, and cultures like those promoted by Japanese and Chinese designers have achieved growing recognition in the global scene [30], drawing the attention of both Western designers and consumers. These designers have sought to combine traditional local aesthetics and cultural heritage with modern Western fashion elements in their design, in an attempt to combine the local labour force with Western consumer markets. Thus, in an attempt to position Asian fashion cities into the ideal types model, it is possible to highlight how these cities, which have mainly emerged as global centres for fashion manufacturing, have been developing an increasing number of elements that, in the future, could potentially allow them to move towards the symbolic ideal type of fashion city.

2.6. Conclusions

The objective of the chapter was to address the current multifaceted nature of urban fashion and to provide an analytical framework for thinking about fashion cities and approaching the relationship between fashion industry and urban economies in the contemporary scenario. In particular, it moves away from the focus on fashion design as just another example of CCIs and attempts to fill the research gap concerning the analysis of fashion cities from a wider and global perspective. The aim was to stimulate reflection upon the different kind of position that fashion occupies in distinctive urban economies, as well as the different types of urban

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[30] Traditional Asian costume elements like the 'kimono' and 'qipao' have inspired Western designs and have become attractive to Western consumers.

creativity that are associated with the fashion industry, which extend beyond the standard paradigms of the creativity of the CCIs. The entire research was carried out through an extensive analysis, review, and systematization of previous academic literature on fashion's world cities and second-tier cities of fashion, where similar patterns, elements and features of these centres were emphasised and grouped together into multiple and abstract models of fashion centres. More specifically, the entire framework is divided in three main sections of analysis that identify 1) analytical models of fashion's world cities, 2) contrasting patterns of development and promotion of second-tier cities of fashion, and 3) ideal types of urban fashion formations.

The first section distinguishes fashion's world cities on the basis of the relative importance of business-orientated and creativity-orientated fashion industries, and differences in the survival and significance of specialist artisanal production networks. Firstly, Milan and New York tend towards a 'material' system of fashion, and still operate through extensive production schemes. On the other hand, Paris and London tend towards a symbolic production of fashion with lack of a deep manufacturing base and a designer fashion industry more disconnected from the material production of clothes. Secondly, the relative presence of a specialized artisanal production sector affects both the character of fashion training in local HEIs and the nature of local fashion design. In this regard, New York and London seem to function as major cities for fashion education, while Milan and Paris seem to act more as magnets for designers who look for job opportunities in established and well-known fashion houses.

The second section examines contrasting models for the development and promotion of the so-called 'second-tier cities' of fashion. More specifically, it identifies two broad tendencies within strategies to develop new contemporary fashion centres. The first one is focused on fashion design as a form of CCI and draws upon notions of urban creative clusters. The development and strengthening of local designer fashion industries within broader CCIs-oriented policies has represented an important means of competing in the globalised economy and promoting cultural distinctiveness. The second one is associated with place branding, symbolic production, and promotion of cities as key sites of consumption in fashion's international order. In this second model, forms of local retail, events, and media serve less to promote local design, than to promote the city as a place of fashionable consumption plugged into the international order. Lastly, there are also possibilities for new urban fashion formations associated with the new geographies of manufacturing.

The final section draws upon Weber's ideal type approach to put forward a tri-polar scheme

for analysis, that replaces a search for the characteristics of the 'fashion city' with three ideal types: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city'. These ideal types highlight key formations of the relationship between fashion and the urban, drawing upon the discussions of both the complexities of fashion's world cities, and the diversity of experience of other fashion centres. They focus on the apparel productive sector, designer fashion industry, or symbolic production of fashion and present different features for each of the following key dimensions: 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'. The ideal type construct has been often criticised for being an ambiguous and over-simplified method of analysis. However, for the purpose of this dissertation, ideal types are only used as a heuristic device to analyse the diversity of fashion city formations and to speculate about future pathways.

The chapter contributes to expanding the literature on the topic by proposing a first framework of analysis for understanding the complexity and diversity of contemporary urban fashion formations. In particular, it draws attention to fashion's qualities as rather more than a conventional urban CCI. In fact, although some cities have successfully attempted to drive growth in fashion design as a part of broader CCI-based policies, there are other choices and contexts that make a rather different kind of strategy more likely. Creativity in fashion includes also wider forms of symbolism, where elements like retailing, media, events, and education may function as means of promoting innovative types of fashion cities. Urban symbolism seems to be associated with an entire urban apparatus made up of image-producing elements increasingly focused around the 'symbolic' promotion of fashion in cities. Moreover, there also emerge significant possibilities for new urban fashion formations that are traditionally associated with the geographies of fashion manufacturing.

The ideal type approach has also important policy implications and shifts away from the dangers of reading other cities as simply 'second tier' or developing versions of established models set by established centres. In fact, it complicates the kind of 'tool-kit' approach associated with city-boosterism, which has characterized some attempts to promote new fashion centres and to make other cities into the 'new' Paris or New York. It becomes important to stress fashion's wider importance as a more-than-economic feature of urban life and culture. The diversity of contemporary fashion formations emphasizes the importance of historical, economic, cultural, and social factors in the formation of fashion cities, whose features are strongly rooted to the peculiar nature of different urban centres. Thus, cautious is

needed in planning and implementing fashion policy development strategies for the promotion of new fashion centres. In other words, it does not exist a best practice guide for policy makers in the making of a fashion city, but each strategy needs to be well adapted to the specific urban context.

Obviously the 'symbolic fashion city' may capitalize on histories and imagery of fashion as worn on the streets, as for example in the figure of the 'Parisienne', or London's regular appropriation and celebration of its subcultural richness. But it is important to think of fashion as more than just a resource for place branding. Fashion has been a key element in the vibrancy of urban cultures, and there are dangers in any analysis that restricts its relationship with the urban to different forms of economic strategy missing key elements of both the nature of fashion and of urban culture. The accentuated ideal type of the symbolic fashion city points to the risks of what can be described as a 'hollowing-out' of the fashion city, detached not just from making and designing clothes, but also potentially from the creativities of wearing clothes in cities.

The construction of ideal types raises the essential question of what metrics can be used to position actual fashion city formations in the 'ideal-types' framework. A ternary diagram, with the three ideal types at the corners, is proposed to plot fashion centres in terms of their tendency towards each of these models. The positions of cities in the diagram are not objective finely calibrated but do indicate broad patterns. Moreover, fashion cities at different points in time may occupy different positions and also tend towards diverse ideal types. This chapter draws upon an analysis of existing literature to approximately suggest positions of fashion cities in the analytical model. However, a huge variety of methodologies can be applied for this purpose. In particular, the complexity and diversity of urban fashion formations is fully reflected in the variety of methods that can be used to analyse contemporary fashion centres. The next two chapters, which draw upon London as unit of analysis, propose two methodologies and are intended as different exploratory exercises to position a fashion centre in the 'ideal-types' framework.

Chapter 3

An analysis of London from a 'supply-side' side perspective: Towards the ideal type of the 'symbolic fashion city'

ABSTRACT

Ideal types work as an important heuristic device to think about actual fashion cities and speculate about future pathways. However, the complexity and diversity of fashion city formations is fully reflected in the large variety of methodologies that can be used to position fashion centres in the ideal types model. This chapter proposes a methodology of analysis from a 'supply-side' perspective and is intended as a first exploratory exercise to position a fashion centre in the 'ideal-types' framework. It also contributes to drawing a picture of a fashion centre from a perspective that addresses all the elements that have contributed to its formation, transformation, and current nature. To do this, a qualitative and quantitative analysis of London as a distinctive example of fashion city in the world is presented. The dimensions of 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system' of London's fashion ecosystem are explored through the execution of semi-structured interviews with local key actors and statistics on the fashion industry from local government, institutions, and research centres. Results conclude that London may tend towards the ideal type of the 'symbolic fashion city'. Forms of urban symbolism particularly linked to the education system, fashion retail, fashion journalism, fashion event organization and museum curation significantly outweigh the traditional manufacturing of apparel and even the design of clothing for production. These main dimensions intertwine to support an image of London as one of the most creative fashion cities in the world.

Keywords: fashion city, London, creativity, manufacturing, education system, urban symbolism.

3.1. Introduction

The previous chapter has suggested an analytical framework for addressing the current multifaceted nature of the relationship between fashion and urban economy. Firstly, it has identified multiple models of 'fashion's world cities' and patterns of development of 'second-tier cities', drawing upon the importance of business, creative, or symbolic aspects of the fashion industry as main element of differentiation. Secondly, using the Weber's ideal type approach as methodological tool, three ideal types of fashion centres have been proposed: the 'manufacturing fashion city', the 'design fashion city', and the 'symbolic fashion city.' Each of the three ideal types focuses on a different segment of the fashion industry: a productive sector, an independent designer fashion industry, and image-producing activities. These ideal types are only hypothetical constructions, which do not correspond exactly to the reality, and cities may have some elements of each model. However, they work as an important heuristic device to think about fashion cities, as well as exploring the diversity of fashion city formations and speculate about future pathways. In particular, the previous chapter ended with the open question of what methodologies can be used to position fashion city formations in the 'ideal-types' framework.

A substantial body of research has been carried out to examine different urban fashion formations across the world, including traditional fashion's world cities and new alternative centres of fashion culture. Several studies have focused on the historical formation and more recent transformation of fashion's world cities from manufacturing hubs into design-oriented centres of fashion (Scott, 2002; Rantisi, 2004; Evans and Smith, 2006; Merlo and Polese, 2006; Williams and Currid-Halkett, 2011). Other studies have investigated how a rising number of local governments, both in developed and developing countries, have recently included the growth and strengthening of the designer fashion sector within broader development strategies aimed at regenerating cities through CCIs (Rogerson, 2006; Larner et al., 2007; Hu and Chen, 2014; Pandolfi, 2015). Another stream of research has addressed the role of fashion as a powerful image-creator capable of branding cities as new symbolic-oriented centres of fashion, thanks to the joint action of specific cultural intermediaries like fashion weeks, shopping districts and media (Rocamora, 2006; Martínez, 2007; Chilese and Russo, 2008; Jansson and Power, 2010; Skov, 2011). Lastly, some scholars have analysed some characteristic elements of traditional and newer fashion centres (e.g., manufacturing base, designers' behaviour, structure of the fashion industry, nature of the education system) that are part of different geographical contexts (McRobbie, 1998; D'Ovidio, 2010; Leslie and

Brail, 2011; Pratt et al., 2012; Volonté, 2012).

What is still lacking is a comprehensive analysis of a fashion city from a perspective that examines together all the elements that have contributed to its formation, evolution, and current nature. To fill this gap in existing research, the objective of the present chapter is to carry out an extensive study of a fashion city that may emphasize all the components that are behind its development and transformation. The analysis is placed in the framework of analysis discusses earlier. The aim is to understand how a 'real' fashion city may be positioned in the ideal types model. The analysis contributes to drawing a comprehensive picture of a distinctive urban fashion formation. The study is carried out from a 'supply-side' perspective through an in-depth exploration of the six 'dimensions' that have been regarded as the essential elements of fashion city formations. The chapter sheds light on a first methodology that can be used to position fashion centres in the 'ideal-types' framework. Qualitative and quantitative data collected for each of the six dimensions under investigation are used as methodology to fill a fashion centre inside the diagram. Moreover, the work further contributes to stimulating reflection on the current relationship between fashion and urban economies.

More specifically, the chapter presents a qualitative and quantitative study of London as an idiosyncratic example of fashion city in the world. This fashion centre, which is also internationally acknowledged as one of most creative cities in the world, has undergone a peculiar and complex formation and evolution, and is extremely diversified in all its economic, cultural, and social features. It is particularly endowed with a rich cultural and creative sector that generates both symbolic and economic value. The highly creative environment, specific historical trends and local cultural movements have made London a distinctive example of creative fashion centre, which is set apart from the other fashion's world cities. To this day, very little research has analysed London from a comprehensive perspective that may shed light on its complex formation, evolution, and nature as a fashion centre. Previous studies have addressed individual aspects of this fashion city, such as the relationship between the local education system and fashion industry (McRobbie, 1998), the clothing industry's structure (Evans and Smith, 2006), and the behaviour of fashion designers (D'Ovidio, 2010). However, an extensive study that simultaneously addresses all the characteristic elements of this fashion centre has not been carried out yet. Thus, in this chapter, emphasis is given to the analysis of the overall nature of London as fashion city in order to understand the specific ideal type towards which London tends.

3.1.1. Research methodology and data collection

Previous research on fashion cities has primarily drawn upon the collection of qualitative data through the method of interviews and the development of case analyses. In some instances, quantitative data, often related to employment and establishment values, have been used to carry out analyses on fashion industries and designers (Currid, 2007a; Chilese and Russo, 2008; D'Ovidio, 2010; Jansson and Power; 2010; Williams and Currid-Halkett, 2011; Pandolfi, 2015). In a similar vein, the present research draws upon an extensive qualitative and quantitative analysis of London's fashion ecosystem, which is explored through the 'dimensions' that have been regarded as key elements of fashion city formations: 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment' and 'promotional media system'. The main data collection included the execution of semi-structured interviews with key actors of the local fashion ecosystem, as well as published and unpublished statistics and significant policy documents from local governments, specialist institutions, and research centres.

Firstly, primary data were collected in the period from July 2016 to January 2017 through the execution of 23 semi-structured interviews with key public and private actors, who play prominent roles in the local fashion economy. These individuals were firstly identified through a mapping exercise on the major actors in London's fashion domain, and a process of snowball sampling was used for obtaining subsequent interviews. Interviews were conducted with major representatives of the six dimensions under investigation, and included heads of leading fashion design schools, and senior figures of specific institutions engaged in the support of creative industries or of fashion manufacturing firms. Others were carried out with representative individuals of museum institutions, fashion media and retail firms, as well as with independent fashion designers. Moreover, some additional interviews were conducted with researchers engaged in studies concerning London or, more specifically, the local fashion economy. It may be important to mention that the response rate of requests for interviews was very low and accounted only for 6%. The main difficulties were found in selecting people available for interviews amongst fashion designers, manufacturers and retailers. This might be due to the intense pace of life of people working in this sector. However, a good availability was found amongst representatives of fashion design schools and local institutions. Table 3.1 shows the anonymous list of interviewees by each dimension.

All interviews ranged between thirty minutes and one hour in length, and were digitally tape-

recorded, fully transcribed, coded, and examined according to a set of important themes. Overall, the main themes concerned the role played by fashion education system, manufacturing base, independent designers, museum institutions, media, and retail firms in the local economy. Respondents were asked a range of questions to further the understanding of London's status as a fashion city and the role played by the dimensions in the production of both physical and symbolic fashion. More specifically, the quality research phase had three aims. Firstly, to investigate the developing rhetorical construction of London's fashion position from different views and experiences in order to understand what elements have primarily contributed to defining London as a fashion centre. Secondly, to explore the working practices and roles of the dimensions within the city's economic and social structures. Thirdly, to examine how these elements have joined up together to contribute to the local economy and to its symbolic image within the economic development and regeneration discourse. The semi-structured interview guide is displayed in Appendix A. The answers of interviewees typically reflected their own specific interests related to their field of work. However, given the variety of actors from different segments of the industry that were covered, the analysis provides a relatively wide-ranging overview of London's fashion economy.

Table 3.1. List of interviewees by dimension

Interviewees ⟍ Dimensions	Type of organization	Working position	Reference name used in the chapter
'Economic Structure' and 'Institutional Infrastructure'	Institution engaged in the support of local creative industries	Program Manager	Program Manager of Institution 1
	Institution in charge of sustaining manufactures and local fashion designers	Manufacturing Specialist	Manufacturing Specialist of Institution 2
	Institution for the support of the fashion and textiles industry	Managing Director	Managing Director of Institution 3
	Manufacturing company and provider of mentoring, support and technical skills for designers	Senior Manager	Senior Manager of Institution 4
'Education System'	University of fashion and design	Head of Business School	Head of Business School of Educational Institution 1

'Human Capital' (Fashion Designers)	Art and design school	Head of Fashion	Head of Fashion of Educational Institution 2
	University for arts and design	Head of Fashion	Head of Fashion of Educational Institution 3
	University of media, arts and design	Head of University	Head of Educational Institution 4
	University of media, arts and design	Head of Fashion	Head of Fashion of Educational Institution 4
	Fashion and design company 1	Fashion Designer	Fashion Designer 1
	Fashion and design company 2	Fashion Designer/Retailer	Fashion Designer 2
	Fashion and design company 3	Fashion Designer/Retailer	Fashion Designer 3
	Fashion and design company 4	Fashion Designer	Fashion Designer 4
'Promotional Media System' And 'Retail Environment'	Fashion magazine	Editor in Chief	Editor in Chief of Fashion Magazine 1
	Fashion magazine	Editor in Chief	Editor in Chief of Fashion Magazine 2
	Museum of arts and design	Fashion Curator	Fashion Curator of Museum 1
	Urban museum	Fashion Curator	Fashion Curator of Museum 2
	E-commerce platform for showcasing designers	Founder	Founder of E-commerce Platform
'Researchers' Engaged in Fashion- and London-related Topics	University of fashion and design	Researcher in Cultural Studies	Researcher of Educational Institution 1
	Art and design school	Researcher in Fashion Studies	Researcher of Educational Institution 2
	Multidisciplinary research university A	Researcher in Cultural and Creative Industries	Researcher of Educational Institution A
	Research university B	Professor of Cultural Economy	Researcher of Educational Institution B
	Research university C	Professor of Human Geography	Researcher of Educational Institution C

Sources: Author's elaboration.

Secondly, the interview process was supported by a quantitative analysis based on data from a variety of local sources, including local governments, specialist institutions, and research centres. In particular, published and unpublished government statistics and significant policy documents from the Office of National Statistics (ONS), Greater London Authority (GLA), British Fashion Council (BFC) and Higher Education Statistics Agency (HESA) strongly contributed to supporting and strengthening the qualitative part of the research. More

specifically, estimating the significance of the local fashion industry over time involved gathering data on 'employment' and 'number of establishments' for the manufacturing, designer fashion, and retail sector. Data were collected from the Business Register and Employment Survey (BRES)[31] and its predecessors: Annual Business Inquiry (ABI), the Annual Employment Survey (AES), and Census of Employment (CoE). These databases were accessible through the provision of a temporary personal authorization (i.e., Chancellor of the Exchequer's Notice) from the Office of National Statistics (ONS).

Moreover, the quantitative analysis drew upon data from the Higher Education Statistics Agency (HESA) on a series of variable on students from local fashion higher education institutions. More specifically, data were gathered on the number of students enrolled in fashion-related topics by subject, HE provider, as well as domicile, typology and location of employment. These data were personally and temporarily provided by HESA and have been extracted from the 'Destinations of Leavers from Higher Education Providers 2014/15' and the 'Students in Higher Education Providers 2014/2015' dataset. It is important to highlight that the entire quantitative research was partially constrained by the limited availability of data concerning the delimitated 'London area'. Data on the fashion industry are more easily available at a more aggregate level like those referring to the entire UK. As far as BRES and related data are concerned, the revisions of the business activities' classification scheme SIC (Standard Industrial Classification) in 1968, 1980, 1992, 2003 and 2007 have made complicated the analysis of historical trends. Moreover, since BRES is based on a sample of businesses, it can be affected by sampling variability, which is much more likely when considering smaller geographies.

The chapter is organised into five main sections. The first section outlines the reasons why London has been selected as unit of analysis of the present research and discusses the historical and actual significance of culture, creativity, and fashion in the city. The second section presents a qualitative and quantitative analysis of the fashion manufacturing base in order to understand its importance and contribution to the local economy. The third section focuses on the analysis of the local fashion education system with a particular emphasis on the main elements that have contributed to the attraction and production of international

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[31] The Business Register and Employment Survey (BRES) produces annual employment statistics from businesses by detailed geography across the whole of the UK economy. Due to the sample size of the survey that is approximately 80,000 businesses, BRES is able to provide good quality estimates for detailed breakdowns by industry and geography.

creative talent, as well as on some potential weaknesses. The fourth part discusses the main factors that may affect the retention of creative talent in London, including job opportunities and the environment's capability of stimulating the birth and growth of local designer fashion firms. The final section addresses how fashion retailers, media system, events, and museum institutions may contribute to the promotion of symbolism associated with fashion in the city. Finally, conclusions discuss the overall nature of London as a fashion centre as resulted from the analysis of the six dimensions under investigation and shows the ideal type towards which London tends.

3.2. Why London? Explaining culture, creativity and fashion in the city

A number of studies have acknowledged London as a place dominated by a unique, diversified and rich cultural and creative sector, which attracts the most innovative creative talent in the world and hosts a significant pool of diverse creative industries and occupations, together with a huge number of cultural intermediaries (Landry, 2001; Pratt, 2009; Freeman, 2010; Lee and Drever, 2013). Over time, art heritage, cultural institutions, and leading creative industries' clusters have contributed to the economic, cultural, and social wealth of the city. Local governments have growingly recognised the significance of culture and creativity in embodying and expressing urban identity and local distinctiveness. As a consequence, they have strongly invested in CCIs as a driving factor for stimulating economic growth and generating a creative image for the city (Landry, 2001; D'Ovidio, 2016). These industries also contribute to driving wage and employment growth in other sectors in the UK (Lee, 2014) and play an important economic and structural role in the urban economy of London (Pratt, 2009). In 2015, the Gross Value Added (GVA) of creative industries in London was estimated at £42 billion, contributing 11.1% of total GVA in London and accounting for around 47.7% of the UK total value for the sector. Between 2009 and 2015, the GVA of creative industries in London increased by 38.2% (versus a 30.6% increase across all industries). In 2016, 11.9% (622,600) of total jobs in London were in the creative industries (DCMS, 2015; GLA, 2015; 2017).

London has a long-established history as a centre of cultural production. The broad interest in creativity and culture is something that dates back to the nineteenth century. London has a long-established history as a centre of cultural production. The broad interest in creativity and culture is something that dates back to the nineteenth century. In particular, during the

Victorian era, these elements were already regarded as strategic factors for urban regeneration (GLA, 2015). In 1851, the Great Exhibition[32], which was the first international display of manufactured products from all over the world, had a real impact in marking the high importance of culture in London. In fact, this influential event paved the way for the establishment of many cultural quarters and institutions, and also for the huge significance of local arts and design education. For example, the cultural quarter in South Kensington (i.e., Albertopolis) was opened after this exhibition and, nowadays, is the host of many of the leading London's cultural and educational institutions, such as the Victoria and Albert Museum (V&A), the Science Museum, the Natural History Museum, The Royal College of Art, Imperial College and many other organizations.

To this day, the broad interest in creativity and culture is still manifested through the willingness of transforming the London 2012 Olympic Park into a new cultural and higher education quarter (i.e., Olympicopolis). The new cultural hub will include a theatre for Sadler's Wells, a new V&A museum showcasing design, art and architecture collections, as well as a new campus of the London College of Fashion (LCF). Moreover, it will bring together factories, designers' studios, and creative spaces through the creation of a fashion hub called 'Fashioning Poplar'. Over time, local government and policy makers have invested many resources in the promotion of these elements in the territory. Starting from the 1980s, the Greater London Council (GLC) (now Greater London Authority - GLA) has been one of the most important promoters of culture and creativity and has contributed to the development and growth of traditional art forms (e.g., dance, theatre), cultural sites, major arts institutions and independent creative producers (e.g., music, film). Later, in 1997, the establishment of the Department of Culture, Media, and Sport (DCMS) has finally made culture and creativity 'legitimate' objects of local and national policies.

Hence, looking back in time, culture and creativity have been central elements of the London economy and have profoundly contributed to shaping its remarkable and unique environment. Over time, a sense of freedom, high levels of dynamism and the openness to newness and experimentation have attracted the most creative people in the world. In turn, the high level of diversity originating from the amalgamation of different cultures, as well as the presence of a

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[32] The Great Exhibition was organized by Henry Cole and Prince Albert and was held in Crystal Palace in Hyde Park (London) in the period from May to October 1851. It included products manufactured from all over the world, such as pottery, porcelain, ironwork, furniture, perfumes, pianos, fabrics and so on, with a huge emphasis on British manufacturing (V&A, 2017).

huge range of diverse creative businesses (e.g., film, advertising, media, architecture, music) and cultural and artistic institutions (e.g., Tate Modern, Barbican, South Bank Centre), have made London a fertile soil for further creativity. Additionally, a highly stimulating education environment and the variety and complexity of the city itself that includes a huge range of innovative architecture, fascinating landscape, multi-cultural street markets and creative places for learning (e.g., art galleries, restaurants, cafes, libraries, theatres) have contributed to making London one of the major creative cities in the world.

'The city has major global players of culture, from the Tate Modern to the Victoria and Albert museum, the South Bank Centre, the Royal Opera House and so many other performance companies and venues. It is rich in terms of makers and venues for popular music and respective distribution networks. So you have a real dense cultural and educational institutional infrastructure alongside a great diversity of cultural and ethnical traditions in London that makes a very fertile soil for creative cross fertilisation and innovation. People are prepared to take a risk and that risk taking is supported' (Personal Interview with Head of Educational Institution 4).

The highly cultural and creative nature of London has had a very nurturing influence on local fashion, and, in turn, fashion has strongly contributed to shaping the local environment. 'Design, manufacture, retailing and the use of fashionable dress in the capital have always played a vital role in forming London's distinctive character' (Breward et al., 2004, p. 3). Nowadays, London is internationally acknowledged for being one of the most dynamic and innovative creative fashion hubs in the world. In this regard, the interview process revealed how an increasing number of local governments across the world, both in developed and developing countries (e.g., African cities), are looking at how London has achieved its unique reputation for creativity in fashion, and some of these are also investing in emulating some main features of London's fashion economy (e.g., education system, support institutions).

The fashion industry, which is at the heart of its creative industries, contributes enormously to the economy of the country and of the city, although its impact varies according to the industry's definition considered. Based on a broad definition,[33] which goes beyond the

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[33] The Value of the UK Fashion Industry (Oxford Economics, 2010), which is a study jointly commissioned by the British Fashion Council (BFC) and the London Development Agency (LDA), measured the economic impact and value of the UK fashion industry, including the contribution made by manufacturing, education, media, wholesale, retail, marketing and other related creative industries.

creative and design element and embraces a wide range of activities like manufacturing, education, media, wholesale, retail, marketing and related creative industries, in 2009 the UK fashion industry was estimated to have directly contributed £21 billion to the UK economy, namely 1.7% of total UK Gross Domestic Product (GDP) and around twice the size of car manufacturing (£10,1 billion) and chemical manufacturing industries (£10,6 billion). The major contribution derived from retail and wholesale distribution (together accounting for 85.9% of the total value), whereas textiles and manufacturing accounted for a smaller portion of the value (11.9%). Minor contributions came also from media, education, marketing and fashion-related creative activities, which overall generated 2.2% of the value (Oxford Economics, 2010). More updated figures show that, in 2015, the UK fashion industry contributed £28.1 billion to the national economy (1.5% of UK GDP) with a value of employment of 880,000 (Oxford Economics, 2016).

On the other hand, according to a narrow definition[34], which takes into account only the creative and design element of the industry, in 2009 the designer fashion sector was estimated to have contributed £120 million to the UK economy, accounting for 0.01% of total creative industries' GVA (£36.3 billion). In the same year, the sector included 900 enterprises, of which 260 were located in London (DCMS, 2011).

As far as London is concerned, in 2015, the broad fashion industry (i.e., including design, manufacturing, retail, distribution, advertising) contributed around £5.5 billion to the local economy. More specifically, retail and distribution accounted for the greater GVA value, generating respectively £3.4 billion and £1.2 billion. On the other hand, in the same year, the mere designer fashion industry registered a GVA of £341 million (BOP Consulting, 2017). Furthermore, in recent years, internationally renowned showcase events, particularly the London Fashion Week and a growing number of fashion-related exhibitions that are organised in the city (e.g., 'Alexander McQueen: Savage Beauty Exhibition', 2015) have had an enormous impact on London's economy and have also contributed to the development of a significant business tourism industry.

'London Fashion Week Men's is a truly international celebration of fashion, design, and creativity. As Mayor, I'm proud to be able to provide funding to support this event

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[34] Department of Culture, Media and Sport (DCMS), in the original mapping document of the creative sector (1998), included only the designer fashion sector as economic contributor to creative industries, not taking into account manufacturing, retailing and service activities.

and the next generation of London designers. Fashion is the largest employer of all our creative industries, supporting almost 800,000 jobs and worth an astonishing £28 billion to the UK economy. From Burberry to Stella McCartney, Agi & Sam to Vivienne Westwood, London has been at the forefront of modern fashion, shaping and defining the latest styles and trends for decades. Today, press and buyers from as far away as Beijing and Seoul and Montreal will flock to London Fashion Week Men's, showing that London is truly open to business, talent and visitors from across the globe' (Mayor of London, January 2017).

3.2.1. Cultural movements and the emergence of creative fashion

Historical cultural movements have profoundly contributed to shaping the current nature of the local fashion economy. According to Breward et al. (2004, p. 13), 'the multi-layered pasts of a world city have inspired generations of aspiring designers, retailers and commentators to produce challenging interpretation of contemporary life through the medium of fashion'. It is important to highlight that London has not always been acknowledged for high levels of creativity and symbolism in fashion. In the eighteen and nineteenth century, London was internationally known for the artisanal production of traditional fashion garments: firstly, tailoring classical men clothes and, later in time, women clothes notably renowned for the elegant and minimalist style (Breward et al., 2004). In particular, starting from the 1740s, Savile Row tailored suits, Jermyn street shirts and hand-made brogues, as well as the St. James's Street bowler hats made London associated with a masculine style of dressing and the identity of the 'dandy'. These producers have represented a cultural symbol for bespoke men's tailoring cultural tradition in London. This method of tailoring had a considerable influence on the design of women's wear and the 'tailor-made' became a major strength of the city in the nineteenth century. During this period, organizations of the clothing industries increased significantly and later proliferated due to waves of immigration. Many people were employed in traditional clothing manufacturing in London. While the West End was associated with the production of high-quality bespoke garments, the East End manufactured less prestigious items. Moreover, in line with the entrepreneurial spirit of London in this period, several new inventions were developed in the field of fashion production, notably the waterproofing fabric (i.e., 'gabardine') that was patented in 1879 by Thomas Burberry. Later, between the nineteenth and twentieth century, fashion retailing started to flourish, and shopping became a major leisure activity for the middle and upper classes. The most famous

London department stores such as Liberty, Harrods, and Selfridges were funded in this period (Breward, 2004; Breward et al., 2004).

In the twentieth century, the sixties brought a profound process of cultural transformation in terms of forms of consumption, production, and lifestyle, which irreversibly marked the nature of local fashion. This period, known as 'Swinging London', encouraged the birth of a purely aesthetic nature of local fashion, which is still one of the elements that set London apart from the other fashion's world cities. A first severe decline of manufacturing and a preliminary process of de-industrialisation were accompanied by a remarkable and spectacular process of restructuring that was based on the development and growth of creative industries (e.g., fashion design, arts, popular music, photography, advertising, modelling). The rise of London's creative economy is commonly associated with the collapse of local traditional industries, such as the docks and manufacturing, which has gradually led to the rising significance of symbolic production. In this period, there was a large increase in interventions in the cultural and creative sector (GLC, 1985), as well as in the network of arts and design institutions (e.g., Goldsmith's College of Art) that strongly contributed to the emergence of a new generation of fashion designers.

The production and nourishment of innovative and experimental ideas was at the centre of a new 'creative wave' of fashion designers (Santagata, 2004), which led to the emergence of a conceptual and progressive approach to fashion characterised by a rebellious and adventurous sartorial style. In this respect, the revolutionary designer Mary Quant played an important role, by offering unusual design and opening up the terrain to an eccentric idea of fashion (Breward and Gilbert, 2008). The designer Vivienne Westwood, who is commonly associated with the 'Punk' cultural movement of the 1970s, promoted highly controversial products and original trends (D'Ovidio, 2016). These cultural movements contributed to making London a centre of fashion endowed with high levels of symbolism, where designers were more concerned about the symbolic content of products than the logics of the market. The atmosphere of deep transformation was also captured by the emergence of highly creative and extravagant consumers, who started to wear unconventional fashion as a way to emphasise freedom, as well as shaping and disseminating new trends in the world. For example, the 'Youthquake', a youth popular cultural movement associated both with fashion and music, emerged during this period giving rise to new styles that quickly spread internationally. Still nowadays, 'London is certainly seen as the world leader in street fashion and pop culture' (Landry, 2001, p. 4). Compared to the other fashion's world cities that are more traditional in values, London

has an exuberant and creative approach to fashion, which is regarded more as a form of art than a form of physical production.

'These value of imagination, inquisitiveness, experimentation and improvisation create a culture when you try out new things, that are embraced and fostered in the UK. So there is a very open climate in which the fashion industry can flourish. I think that is definitively a strength where compared to other countries which are much more conservative in their approaches' (Personal Interview with Head of Educational Institution 4).

It emerges a peculiar urban creative fashion environment, which has undergone a complex formation and evolution notably affected by local historical trends and cultural movements. According to Breward et al. (2004, p. 5), 'London's reputation as a guardian of the bespoke and the edgy remains a constant longstanding, international configuration of fashion cities. But this share history, in which similarities with other centres come naturally to the fore, perhaps obscures the particular characteristics which have always drawn attention to London as a very singular, but sometimes overlooked, example of the fashion city phenomenon'. The local fashion ecosystem has been heavily affected by the creative nature of the city. Over time, manufacturing firms, educational institutions, creative designers, institutional actors and cultural intermediaries have joined together in a densely interwoven infrastructure that has made London a highly distinctive example of fashion centre. Due to the complexity and heterogeneity of elements in its formation, evolution, and current character, in addition to its classification as both a creative and fashion city, London can be regarded as the perfect unit of analysis for carrying out a comprehensive analysis of a fashion centre to be then positioned in the 'ideal-types' framework. The next sections present an analysis of London's fashion manufacturing base, education system, designer fashion sector, and main cultural intermediaries with the aim of exploring the specific nature of these local dimensions and how these intertwine into this specific urban fashion formation.

3.3. Structure and evolution of London's clothing, leather and textiles manufacturing

This section explores London's fashion manufacturing base in order to highlight its principal functional characteristics, evolution over time and current structure. More specifically, it takes

into account the clothing, leather, and textiles industry as principal components of the fashion productive base. The main objective is to deepen the understanding of the significance, impact and contribution of physical production of fashion to the local economy, as well as its integration and possible interconnections with other dimensions that are part of the analysis. More specifically, the section draws upon a quantitative analysis of the evolution of London's fashion manufacturing base over time, with a particular emphasis on its current configuration. The entire study is underpinned by a more qualitative investigation on the nature and key features of the productive system, which is mainly based on the interview process with representative individuals of the 'economic structure', and 'institutional infrastructure', as well as with fashion designers.

The main picture emerging from the interview process primarily identifies London as a centre of creativity in fashion, which currently lacks a solid manufacturing environment and a pool of skilled local craftsmen capable of supporting local designer fashion micro-enterprises. Some previous research works have already mentioned the absence of a real productive sector in London, which might be able to assimilate a large number of products and to manufacture on industrial scale (Jones, 2005; Pratt et al., 2012; Volonté, 2012). The regional distribution of fashion manufacturing in Great Britain (Table 3.2) confirms the relatively lack of specialization of London in this sector (LQ = 0.9). Location quotients (LQ)[35] calculated for Great Britain show that only five of the eleven regions (East Midlands, North East, Scotland, Yorkshire and The Humber and North West) have LQ of more than 1, and all other regions have LQ of less than 1 (East, London, West Midlands, South East, South West and Wales), showing a weakness in the local industry, which probably tends to import this kind of production to satisfy a local demand. However, LQ in London accounted for 0.9, a value close to 1, meaning that the rate of employment in fashion manufacturing is almost equal to the one registered in the national economy.

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[35] The location quotient (LQ) is a local measure of geographical concentration of industries. It is calculated as the quotient between the local share of employee jobs in a specific industry and the local share of national employee jobs. A score of 1,0 indicates that the region has the expected proportion of the industry given the overall employment, and employment in that industry. A score of less than 1,0 indicates an under-representation, a score of more than one an over-representation.

Table 3.2. Fashion-related manufacturing specializations by regions, Great Britain, 2015

Regions	Total employment	Employment in fashion manufacturing	Location Quotient
East Midlands	2,069,000	13,000	2.2
Yorkshire and The Humber	2,392,000	11,000	1.6
North West	3,235,000	15,000	1.6
North East	1,098,000	3,500	1.1
Scotland	2,541,000	8,000	1.1
London	5,037,000	13,000	0.9
West Midlands	2,523,000	5,000	0.7
South West	2,486,000	5,000	0.7
East	2,694,000	4,000	0.5
South East	4,166,000	4,500	0.4
Wales	1,306,000	1,500	0.4

Sources: Author's elaboration using data from Business Register and Employment Survey (BRES) - Office for National Statistics (ONS).
Notes: Data are defined in terms of 13. Manufacture of Textiles, 14. Wearing Apparel and 15. Manufacture of Leather and Related Products (SIC 2007).

3.3.1. Relationship between local manufactures and fashion designers

The relationship between typically small-sized designer fashion businesses and manufacturers in London remains a key issue, and local production has been regarded as a serious challenge to overcome by local governments and policy-makers. In fact, the issue of a weak manufacturing base has long been perceived as a huge concern for local fashion designers, who often referenced this factor as one of the reasons why they may have established or wished to move their working spaces out of the city. Unlike the Italian and French fashion systems, which are usually based on an equally reciprocal business relationship between designers and manufacturers, UK producers have generally operated more as 'suppliers' with rigid minimum order requirements. This has generated serious difficulties for young individual designers, who usually need sampling support and small units' production for their micro-businesses, particularly in the early stages of their career. Moreover, mostly in the past, these relationships have been established on contrasting expectations and lack of the

necessary level of mutual understanding, trust, reciprocity, and knowledge exchange. Late payments and deliveries, lack of specialist skills, high prices, as well as manufacturing errors have been only some among the main concerns of this relationship.

On the one hand, emerging designers, due to their low volumes of production, are not in the position to negotiate with manufacturers on price, quality, and delivery timing of products. Due to the lack of a deep manufacturing base, small designers have not economies of scale and, once reached a certain amount of orders, are forced to stop and remain small. On the other end, established designers with higher size of orders tend to outsource their production abroad, for instance to specialist manufacturers in continental Europe. As a consequence, producing firms have not been able to exploit the economic advantages deriving from larger sizes of orders, and the manufacturing base has remained narrow and inadequate to respond to designers' needs (Karra, 2008; CFE, 2009; BFC, 2015a; UKFT, 2016).

The choice of producing locally or outsourcing is affected by the type of business model adopted by fashion designers in terms of price point, volume of production and quality target. In particular, small-sized designer fashion businesses focusing on high-quality and low quantities of production need to manufacture more locally, whereas large quantities of lower-quality production can be made cheaper abroad. In this respect, many respondents highlighted how those designers who want to manufacture in London care more of the quality of production and of the possibility of monitoring the entire manufacturing process. However, a very high proportion of interviewees referenced the high cost of manufacturing in London as one of the main barriers to make garments produced locally. London-based manufacturers, which are typically small and medium enterprises (SMEs), have been highly affected by the drastic increase of rents in what has been defined as one of the most expensive cities in Europe. The domestic usage of building is increasingly favoured to the commercial one and it is more and more difficult for manufacturing firms to find affordable spaces for their businesses. These manufacturing firms have faced some of the highest operational costs in Europe and, as a result, have not been able to compete on price point with other European manufacturers, such as those located in Italy (UKFT, 2016). Some respondents stressed also the issues of the lack of local specialization techniques (e.g., embroidered work, embellishments) and also the shortage of skilled people in the manufacturing industry, which has long been dominated by an immigrant workforce (e.g., Turkish, Romanian, Bangladeshi, Greek, Cypriot, Polish) that is usually embedded within delimitated ethnic areas in the East of London (GLC, 1985). Moreover, Brexit and the related uncertainty about the continuing

154

rights to work in the UK have led some migrants to move back to their countries of origin, reducing the flow of new manufacturing workers (BOP Consulting, 2017).

'It is still relatively expensive to manufacture in London, so a lot of designers get their stuff made abroad. There are some manufacturing specialisation techniques that really London does not necessarily have. For example, you might go outside London for lace work and for very fine work' (Personal interview with Manufacturing Specialist of Institution 2).

'All of our workforce was a migrant workforce and we could only ever get skilled machinists through word of mouth from the machinists that we already had working with us' (Personal interview with Senior Manager of Institution 4).

3.3.2. Decline and contraction of London's fashion manufacturing base

The presence of a poor manufacturing environment, both at national and regional level, is a phenomenon that dates back to many decades ago. Using the Business Register and Employment Survey (BRES) and its previous versions[36] from ONS, this sub-section traces the evolution of fashion manufacturing in Great Britain and London in the period from 1971 to 2015. These databases break down industries into SIC (Standard Industrial Classification) codes, which is the official statistical classification for business establishments in the United Kingdom. More specifically, data were collected on employment[37] and number of local units[38] (i.e., establishments), and the study was commenced with 1971, since it was the earliest data available at SIC level for employment. The analysis forming this sub-section is partially constrained by the periodic revision of the SIC[39], which applies different methods for

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[36] Up to 1993 the survey was known as the Census of Employment (CoE), from 1995 the survey became annual, and was renamed the Annual Employment Survey (AES), and from 1998 the Annual Business Inquiry (ABI) was the official source for employee jobs below national & regional level. Lastly, in 2009, the Annual Business Inquiry (ABI) and Business Register Survey (BRS) were merged together to form the Business Register Employment Survey (BRES).

[37] Employment data in BRES include the number of employees and the number of working owners (for example, sole proprietors and partners). BRES does not cover the very small businesses neither registered for VAT nor Pay-As-You-Earn (PAYE), which form a small part of the economy. The ONS estimates that about 50% of businesses in the UK fall outside this category.

[38] ONS defines 'local unit' as an individual site (for example a factory or shop) associated with an enterprise. It can also be referred to as workplace.

[39] These changes have been introduced with the gradual emergence of new products and industries, in order to highlight the shift in emphasis within existing industries (Creigh-Tyte, 2005).

data classification over time, making these data not particularly suitable for time series analyses. In the period under investigation, SIC revisions took place in 1968, 1980, 1992 and 2003, and a new standard industrial classification has been introduced and applied to census collection from 2007 onwards. However, as far as the clothing, leather, and textiles industry is concerned, there are very minor differences between the classification schemes that have been developed over the years[40]. Changes have mostly involved shifts of sub-categories within fashion-related manufacturing classes and the removal or addition of codes whose weight on total was not very significant. However, it is important to take into account these SIC revisions when analysing and making considerations on historical trends.

The decline of Great Britain's manufacturing over the last decades is one of the most evident features of historical data. As part of this wider trend, fashion manufacturing has experienced a severe and dramatic drop starting from the 1970s (Figure 3.1). In the same vein, London has seen a severe loss of manufacturing jobs and fashion production has faced a dramatic fall in terms of employment (Figure 3.2). The two figures show how the collapse of clothing, leather, and textiles manufacturing is in line with the catastrophic fall of the broader manufacturing category, both in Great Britain and London. More specifically, looking at data showed in Table 3.3, from 1971 to 2015, fashion manufacturing registered an employment decrease of - 92% in Great Britain and of - 87% in London. This variable plummeted from 1,056,700 to 81,800 in Great Britain, and from 100,800 to 13,200 in London. In the period from 1987 to 2015, the number of establishments decreased by - 40% in Great Britain (from 14,468 to 8,670) and by - 36% in London (from 2,812 to 1,810). The biggest drop occurred in the period between 1999 and 2003, with a fall accounting for - 46% in Great Britain and - 47% in London. Moreover, from 1987 to 2015, the average number of employees per establishment decreased dramatically in Great Britain (i.e., from 38 to 9) and almost halved in London (i.e., from 13 to 7).

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[40] By looking at the shift between SIC 1968 and SIC 1980, the major change concerned the inclusion of 'man-made fibres production' within the 'chemical industry', rather than the 'textile industry'. According to SIC 1992, some subclasses were added within the 'manufacture of textile' class 17 (i.e., 'production of manmade fibres' 2600, 'industrial and special purpose papers' 4710, 'other paper and board products' 4728, 'upholstered furniture' 4671, 'other manufactures not elsewhere specified' 4959, 'aerospace equipment manufacturing and repairing' 3640, 'plastic coated textile fabric' 4831 and within the 'tanning/dressing of leather' class 19 (i.e., 'plastic products not elsewhere specified' 4836, 'sports goods' 4942, 'rubber products not elsewhere specified included reclaimed rubber' 4812). Some minor changes for fashion manufacturing occurred between SIC 2003 and SIC 2007. The sub-classes 'repair n.e.c.' (52740 - SIC 2003) and 'other manufacturing n.e.c.' (36639 - SIC 2003) were included within the class of 'manufacture of textiles'. Moreover, there were some shifts of sub-classes within the broad fashion-related manufacturing group.

Figure 3.1. Employment trend in manufacturing and fashion manufacturing for Great Britain, 1971-2015

Notes: Data on establishments (i.e., local units) come from the Workplace Analysis of ABI, AES, and CoE (1987-2008) and from the UK Business Counts (Local Units) (2010-2015). Note that data on employment are rounded to the nearest 100 according to the disclosure rules of BRES (2015).
Data from 1971 to 1981 are defined in terms of 7. Textiles, Leather and Clothing (SIC 1968 - CoE). Data from 1982 to 1991 are defined in terms of 43. Textile Industry, 44. Manufacture of leather/leathergoods and 45. Footwear/Clothing Industry (SIC 1980 - CoE). Data from 1992 to 2008 are defined in terms of 17. Manufacture of Textile, 18. Manufacture apparel; dressing/dyeing fur and 19. Tanning/dressing of leather, etc (SIC 1992 - AES and ABI). Data from 2009 to 2015 are defined in terms of 13. Manufacture of Textiles, 14. Wearing Apparel and 15. Manufacture of Leather and Related Products (SIC 2007 - BRES). Note that SIC 1968, SIC 1980 and SIC 1992 are not strictly comparable.

Figure 3.2. Employment trend in manufacturing and fashion manufacturing for London, 1971-2015

Table 3.3. Employment and establishments trend in fashion manufacturing for Great Britain and London, 1971-2015

Year	Great Britain			London		
	Employment	Establishments	Emp./Est.	Employment	Establishments	Emp./Est.
1971	1,056,700	-	-	100,800	-	-
1975	917,900	-	-	75,300	-	-
1978	854,000	-	-	63,800	-	-
1981	623,500	-	-	48,900	-	-
1984	550,400	-	-	36,900	-	-
1987	547,700	14,468	38	37,000	2,812	13
1991	412,700	13,290	31	24,400	2,244	11
1995	358,800	16,050	22	24,700	3,309	7
1999	289,800	15,000	19	23,100	3,340	7
2003	157,700	11,353	14	12,200	2,230	5
2007	102,000	9,393	11	7,700	1,781	4
2011	84,800	8,065	11	5,600	1,565	4
2015	81,800	8,670	9	13,200	1,810	7

Sources: Author's elaboration using data from Business Register and Employment Survey (BRES), Annual Business Inquiry (ABI), Annual Employment Survey (AES), Census of Employment (CoE), and UK Business Counts (Local Units) - Office for National Statistics (ONS).
Notes: Data on establishments (i.e., local units) come from the Workplace Analysis of ABI, AES, and CoE (1987-2008) and from the UK Business Counts (Local Units) (2010-2015). Note that data on employment are rounded to the nearest 100 according to the disclosure rules of BRES (2015).
Data from 1971 to 1981 are defined in terms of 7. Textiles, Leather and Clothing (SIC 1968 - CoE). Data from 1982 to 1991 are defined in terms of 43. Textile Industry, 44. Manufacture of leather/leathergoods and 45. Footwear/Clothing Industry (SIC 1980 - CoE). Data from 1992 to 2008 are defined in terms of 17. Manufacture of Textile, 18. Manufacture apparel; dressing/dyeing fur and 19. Tanning/dressing of leather, etc (SIC 1992 - AES and ABI). Data from 2009 to 2015 are defined in terms of 13. Manufacture of Textiles, 14. Wearing Apparel and 15. Manufacture of Leather and Related Products (SIC 2007 - BRES). Note that SIC 1968, SIC 1980 and SIC 1992 are not strictly comparable.

The reason of this impressive decline and severe contraction of fashion manufacturing in London has been due to a combination of events. As discussed in the first chapter, the most important influencing factor was the delocalisation of production abroad, which was particularly intensified by the gradual removal of trade barriers under the World Trade Organization's (WTO's) Agreement on Textile and Clothing over the past twenty years. In fact, starting from the 1970s, the emergence of low-cost manufacturing in East Asia, Turkey,

North Africa and Central and Eastern Europe has led to an intense phenomenon of large-scale outsourcing of fashion production to contractors outside Great Britain with the aim of reducing costs (Robinson and Hsieh, 2016). As an example, in the period from 1988 to 2004, the percentage of clothing sourced from British suppliers and sold in Marks & Spencer plummeted from 87% to 10% (BOP Consulting, 2017). Starting from the 1980s, most of large-scale fashion production that was emerged in London in the early twentieth century has progressively shifted towards lower-cost producers abroad (GLC, 1985). As a result, local fashion manufacturing has undergone significant structural changes through a profound process of severe contraction and also of restructuring and transformation.

3.3.3. Analysing the restructuring and transformation of local fashion production

In addition to the shrinkage of the local fashion production system, some of the remaining manufacturing firms have shifted towards smaller-scale, design-oriented or higher-quality forms of fashion production as a strategy to survive in the growingly competitive market (Skillset, 2010). Together with the upgrading of local production towards high-end and design manufacturing, some other firms have adopted diverse forms of restructuring such as the development of new functions in the supply chain, the relocation of production to lower-cost manufactures in Europe and Asia, the repositioning in different niche sectors or the diversification of the product offering (Evans and Smith, 2006).

This sub-section is aimed at furthering the understanding of the processes of restructuring and transformation that the clothing, leather, and textiles industry has undergone in London over the years. The change in the character, structure, and composition of London's fashion manufacturing has been a theme constantly raised during the interview process. In particular, a number of respondents highlighted how many large factories focusing on great quantities of low-quality garments, have been replaced by smaller-sized firms that now produce higher-quality products. In recent years, it has been witnessed an increase in the number of small-sized manufacturers that are specialised in sampling and bespoke production (Oxford Economics, 2010; BFC, 2012; Virani and Banks, 2014). These small producers seem to be more responsive to the needs of designers and of the market, and work also on small minimum orders.

'*London is not generally regarded as a manufacturing city, because most large-scale manufacturing has gone out. But there are lots of small factories in London (…). In the*

past the manufacturers did not like working with designers, designers on the other hand had a terrible feeling for manufacturers based on manufacturers never do what you want, they are always late, too expensive (...). Now they are a lot closer, you have got manufacturers who do what the market is expecting them to do. You have then got these designers who are better educated in manufacturing and know a little bit more' (Personal interview with Manufacturing of Institution 2).

'*When I was designing and producing in the late 1990s, I had to get everything produced abroad (...). The fact that there are small factories in the last years means the designers can actually produce and control production in London'* (Personal interview with Head of Fashion of Educational Institution 4).

Table 3.4 displays the downsizing of the sector in the period from 1987 to 2007. In 2007, London accounted for 92.2% micro-establishments with less than 10 employees. More specifically, 78.6% of local units were micro-firms with less than 4 employees. Looking back in time, in 1987, London accounted for 63.3% micro-firms, of which 34.7% had a number of employees between 1 and 4. Compared with 2007, where small establishments were only 7.1%, in 1987 small firms represented 32.8% of total establishments, confirming a slight downsizing trend. Moreover, in the period under consideration, medium-sized firms decreased from a percentage of 3.3% to 0.7%, whereas large firms disappeared from the local manufacturing base. Therefore, the table illustrates how fashion-manufacturing establishments have shrunk over time in terms of sizing of employment. Lastly, Table 3.5 can be useful to shed light on the current composition of fashion manufacturing in London. In 2015, the highest proportion of fashion manufacturing (65.7%) was included in the 'wearing apparel' class, of which 30.4% was part of the 'manufacturing of women's outerwear' and 16% of the 'manufacturing of other wearing apparel and accessories', which includes the specialization in custom tailoring.

Table 3.4. Frequency distribution of establishments by employment size, London, 1987 and 2007

Year	1987		2007	
Employment Size	Number of establishments	Percentage of establishments	Number of establishments	Percentage of establishments
1-4 employees	976	34.7	1,399	78.6
5-10 employees	810	28.8	243	13.6
11-49 employees	922	32.8	126	7.1
50-199 employees	94	3.3	13	0.7
200 or more employees	9	0.3	0	0.0
Total	2.812	100.0	1.781	100.0

Sources: Author's elaboration using data from Annual Business Inquiry (ABI) and Census of Employment (CoE) - Office for National Statistics (ONS).
Notes: Data come from the Workplace Analysis of ABI and CoE.
Data for 1987 are defined in terms of 43. Textile Industry, 44. Manufacture of leather/leathergoods and 45. Footwear/Clothing Industry (SIC 1980 - CoE). Data for 2007 are defined in terms of 17. Manufacture of Textile, 18. Manufacture apparel; dressing/dyeing fur and 19. Tanning/dressing of leather, etc (SIC 1992 - ABI).

Table 3.5. Fashion manufacturing composition by establishments, London, 2015

Type of industry	Establishments	Percentage of establishments on total
13. Manufacture of textiles	485	26.8
13100. Preparation and spinning of textile fibres	10	0.6
13200. Weaving of textiles	25	1.4
13300. Finishing of textiles	135	7.5
13910. Manufacture of knitted and crocheted fabrics	5	0.3
13921. Manufacture of soft furnishings	160	8.8
13922. Manufacture of canvas goods, sacks etc	15	0.8
13923. Manufacture of household textiles	55	3.0
13931. Manufacture of woven or tufted carpets and rugs	10	0.6
13939. Manufacture of carpets and rugs	10	0.6
13940. Manufacture of cordage, rope, twine and netting	0	0.0
13950. Manufacture of non-wovens and articles made from non-wovens, except apparel	0	0,0
13960. Manufacture of other technical and industrial textiles	10	0.6
13990. Manufacture of other textiles nec	50	2.8
14. Manufacture of wearing apparel	1,190	65.7

14110. Manufacture of leather clothes	30	1.7
14120. Manufacture of workwear	30	1.7
14131. Manufacture of men's outerwear	210	11.6
14132. Manufacture of women's outerwear	550	30.4
14141. Manufacture of men's underwear	10	0.6
14142. Manufacture of women's underwear	35	1.9
14190. Manufacture of other wearing apparel and accessories	290	16.0
14200. Manufacture of articles of fur	5	0.3
14310. Manufacture of knitted and crocheted hosiery	5	0.3
14390. Manufacture of other knitted and crocheted apparel	20	1.1
15. Manufacture of leather and related products	135	7.5
15110. Tanning and dressing of leather; dressing and dyeing of fur	0	0.0
15120. Manufacture of luggage, handbags and the like, saddlery and harness	70	3.9
15200. Manufacture of footwear	65	3.6
Total	1,810	100.0

Sources: Author's elaboration using data from UK Business Counts (Local Units) - Office for National Statistics (ONS).
Notes: Data are defined in terms of 13. Manufacture of Textiles, 14. Wearing Apparel and 15. Manufacture of Leather and Related Products (SIC 2007).

Many respondents highlighted a reversal of the outsourcing process to low-cost countries and an increase in the quantity of fashion products manufactured in the UK and in London. Recently, fashion designers have been attracted by the opportunity to have shorter lead times, higher-quality products, copyright control, flexibility of production, and place-based positive associations. Concerns about unethical working conditions in low-cost countries have further contributed to discouraging the offshoring of fashion production (Virani and Banks, 2014; Robinson and Hsieh, 2016). In particular, in recent years, 'Made in Britain' and 'Made in London' have become very attractive to consumers from Japan, China, and Qatar, and these brands may now constitute an important selling point for emerging designers who want to focus on high quality, authenticity and tradition in fashion. 'Britishness' is usually perceived as associated with creativity, innovation, and history. Nowadays, there seem to be more opportunities to find local manufacturers capable of adapting to fashion designers' needs, and various programs have been promoted to educate fashion designers and manufacturers in establishing more collaborative relationships. In this respect, the interview process showed how many big retailers (e.g., Asos, Arcadia, Primark, Matelan, Marks and Spencer, John Lewis), high-end apparel firms (e.g., Barbour, Burberry, Mulberry), as well as independent

luxury labels have started bringing back portions of their manufacturing process from overseas to the UK or London. This process of 'reshoring' has been also encouraged by rising costs of overseas production in terms of increasing wages and shipping costs in lower-cost countries like China. However, producing locally still implies many difficulties such as very high costs that emerging designers are very unlikely to afford, particularly in the early stages of their career. In this regard, many interviewees were still highly sceptical in how much production can be brought back to London and most of them agreed that a local large-scale manufacturing base would never return.

'One of the manufacturing strengths in London is that we have a lot of very experienced sampling units (...). The manufacturing has changed, all the designers now realise that you can get stuff made in London. What is coming back tends to be a mixture now, first of all it was the high-end staff to come back and the small sampling' (Personal interview with Manufacturing Specialist of Institution 4).

'There are quite a few small manufacturers setting up in London and I think that is the future (...). We are never going back to the sort of volume, but we need to support young designers, new ideas, around where clothes are going, and we need the manufacturing to support that' (Personal interview with Head of Fashion of Educational Institution 3).

3.3.4. The role of local policies: Towards a new type of fashion manufacturing?

Starting from the eighties, the restructuring of fashion production has been the object of specific public policies discourses, such as the issues of flexible specialization of the London Industrial Strategy or the London Development Agency (LDA)'s strategies concerning creative industries, which have sought to promote design in fashion manufacturing and reposition London as a major creative city for fashion (GLC, 1985).

'There are particular opportunities for London firms to respond to the new importance of design. London is a world centre of training in clothing design and of haute couture. CMT firms, particularly, can improve their position in the market by developing some design capacity, which can be used to collaborate with retailers' design departments or to produce the firm's own range of garments. Both production changes and greater

design input can allow the firm to differentiate itself from the mass and thus obtain higher margins' (GLC, 1985, p. 130).

In a similar vein, more recently, several institutions like the Greater London Authority (GLA), British Fashion Council (BFC), Centre for Fashion Enterprise (CFE) and the UK Fashion and Textile Association (UKFT) have investigated the need for developing a new type of high-end manufacturing in the UK. On the other hand, it has been also highlighted a lack of concrete action by the local government to support the viability of fashion manufacturing in the UK and in London (BFC, 2015a). Manufacturers still need to be better trained, educated, and informed for improving the quality of garments and meeting the requirements of small fashion design companies (CFE, 2009; Malem et al., 2009). More recently, it has been also witnessed a lack of manufacturing skills appropriate to the twentieth century like the use of digital fabrication methods (BOP Consulting, 2017). The need for local initiatives oriented towards the survival and regeneration of this industry has been widely recognised. Thus, particularly in recent years, London-based fashion manufacturing has drawn the increasing attention of the government and local institutions. Some of the initiatives launched recently have been aimed at creating a new generation of skilled fashion manufacturing workers in London. Others have sought to improve the relationship between local designers and manufacturers in terms of expectations, trust, and knowledge exchange.

New academies that are exclusively dedicated to providing courses in fashion manufacturing have recently emerged. As an example, in 2014, the 'London Technical Fashion Academy' was established at Hackney Community College to allow young people to be trained in technical fashion manufacturing skills like cutting, sewing and finishing. In a similar vein, the Fashion Technology Academy (FTA), which was created in 2015 by Fashion Enter Ltd in collaboration with the Haringey Council, currently offers courses across stitching, production skills, and pattern cutting. In particular, it is the first fashion manufacturing training academy to operate alongside a factory and fashion studio, ensuring a real exposure to British and London-based fashion manufacturing. The Designer-Manufacturer Innovation Support Centre (DISC) offers workshops and seminars to help both high-end manufactures and fashion designers to innovate their businesses, services, and products (Virani and Banks, 2014).

Moreover, the UK Fashion and Textile Association (UKFT), which helps companies and associations to be part of a network throughout the UK fashion and textile industry, published the 'London Manufacturers Manifesto' (UKFT, 2016), with the objective of establishing an

association of London-based fashion manufacturers. More specifically, the aim is to renew the visibility of local fashion manufacturing, stimulate the growth of a technically skilled workforce, improve the integration of fashion manufacturing into the supply chain, facilitate networking, and set a high quality and compliance standard. More recently, the UKFT has also announced its intention to create a 'fashion manufacturing hub' in London, which would operate as a shared workspace in a building with its own pool of labour. Moreover, the UKFT has also made available to designers, brands, and retailers who want to produce locally a free database of UK-based manufactures and suppliers that is called 'Let's Make it Here'. Equally, the BFC has recently published a database of UK high-end manufactures with the aim of facilitating the relationship between fashion designers and UK manufacturing firms (BFC, 2017).

'London holds a high concentration of fashion manufacturers in a small geographical area. These businesses deliver high-quality services to the fashion industry from the high end to the high street, they have abilities across product and are located in close proximity to the majority of the brands and designers in the UK. This group of businesses is currently unrepresented and suffer from a series of common issues that both threaten their stability and inhibit their growth. These businesses are typically micro SME in size and with an increased and growing demand for the ability to manufacture in the UK there is a need to support their growth potential' (UKFT | London Manufacturers Manifesto, p. 1).

As another example, in 2016, the Mayor of London announced a £3.9 million project to support the heritage of the garment industry, as well as its recent growth in East London. This project, which has been called 'Fashioning Poplar', is a partnership between the London College of Fashion (LFC) and Poplar HARCA (Housing and Regeneration Community Association) and aims to create a new East London fashion cluster. In particular, it will convert disused spaces and lands into a garment manufacturing unit, a number of commercial studios, and an incubation space for designers. Some of the initiatives, like the LFC Fashion Garment Manufacturing Unit, will contribute to providing training and employment to low-skilled workforce in the area. Overall, the aim is to cement the position of London as a world creative fashion capital (Poplar HARCA, 2016).

Although in recent years increasing attention has been paid on improving London's fashion

manufacturing base, as well as the relationship between local designers and fashion manufacturers, the major activity of assistance from institutions seems to be primarily provided on the design side (e.g., fashion designers, London fashion week, talent identification schemes) rather than on real manufacturing aspects of the industry (UKFT, 2016). In this regard, there is a general perception that the local government still tends to treat fashion merely as creative industry. In particular, it is perceived the absence of an overall strategy that might target the specific features of the fashion industry, which includes also an important productive component.

'One of the drawbacks is that there isn't that support and infrastructure and belief in fashion as a not just a creative industry, but a manufacturing industry and a source of employment (...). Lots of people just see fashion as that, glamorous end with dresses on the catwalk or celebrities. They don't see the rest of it, they don't see the tailors that work here, the leather workers that work here, the shoe manufacturers that work here and that sort of stuff' (Personal interview with Managing Director of Institution 3).

3.3.5. Locating fashion manufacturing in London

Figure 3.3 shows the distribution of fashion manufacturing establishments by London boroughs in 1987 and 2016. In 1987, fashion manufacturing was mainly concentrated in the boroughs of Hackney, Islington, and Westminster. In particular, Hackney has long been a major manufacturing employer, notably for tailored womenswear and menswear. In 2016, most fashion manufacturing establishments were concentrated not only in Hackney and Westminster, but also in Haringey and Tower Hamlets, which nowadays are also the home of many designers' studios.

Figure 3.3. The location of fashion manufacturing establishments by London borough, 1987 and 2016
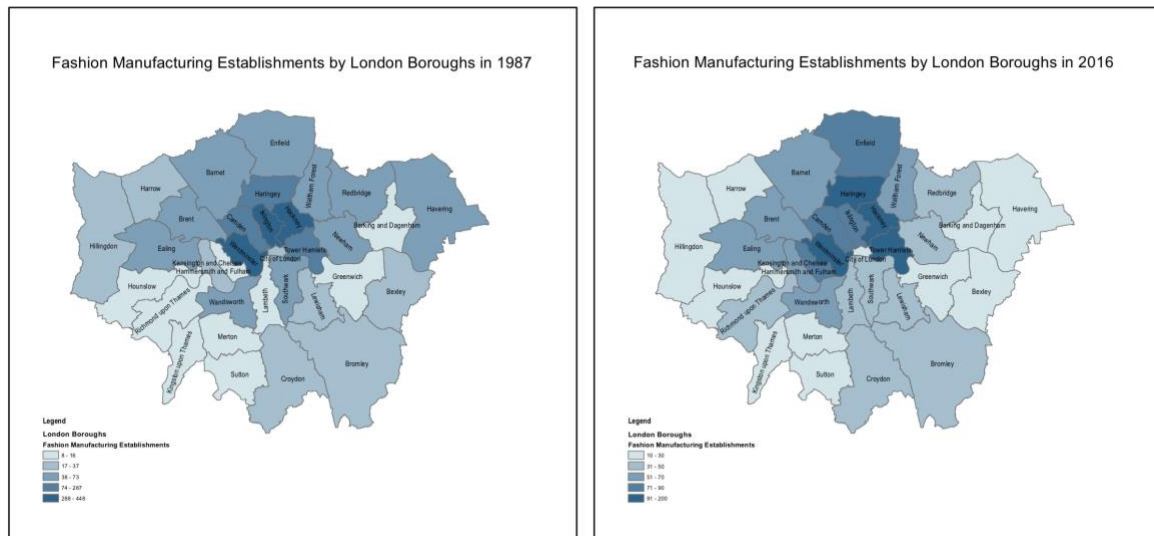
It is important to emphasize the growing significance of the East part of London as new fashion manufacturing hub. In the period from 2010 to 2015, fashion manufacturing in East London registered an increase of 94% in terms of employment (from 2,800 to 5,400) and of 128% in terms of GVA (from £95 to £217 million), accounting for 43% and 41% of the same values in London. Excluding East London, the output of London's fashion manufacture declined by a nominal 23% (BOP Consulting, 2017). In the past, East London was the home of a flourishing fashion garment industry. Nowadays, this area has become an important hub that combines manufacturing firms with fashion designers, training centres, ateliers, and luxury outlets. The overall fashion industry contributes nearly £1.3 billion in GVA and 36,000 jobs to the economy of East London. Recent initiatives targeting the regeneration of East London like the 'Hackney Walk', 'Hackney Fashion Hub', 'Fashioning Poplar', and the future relocation of the London College of Fashion to Stratford have further contributed to reinforcing the central role of this area in the local fashion industry (Budnarowska and Marciniak, 2016).

In the period under consideration, also the borough of Haringey (North London)

extraordinarily contributed to this growth, adding 1,100 jobs in fashion manufacturing and accounting for £62.2 million of GVA (BOP Consulting, 2017). Nowadays, this borough is an important centre for fashion manufacturing accounting for 14% of total employment in the sector. This area is particularly exemplary to reveal some of the efforts recently made for improving the local manufacturing base and the relationship between local producers and fashion designers. In addition to the 'Florentia Clothing village', which is a collection of 33 CMT (cut, make, trim) factories, it is the host of 'Fashion Enter', which is a not profit social enterprise that was created to support emerging designers in manufacturing in London. Fashion Enter Ltd[41] was established in 2006 in replacement of the London Fashion Forum[42], which was an initiative funded by the London Development Agency (LDA). This social enterprise currently includes a fashion studio, which helps independent designers through the provision of small-scale production and samples, and a fabric studio that supports designers to source their fabrics. In addition, the head office is in charge of managing events, seminars and workshops on issues that are not necessarily taught in colleges (e.g., the importance of IP and copyrights). Today, it has more than 100 employees, with a range of clients that vary from new businesses to more established ones, and from high-end to high-street activities (e.g., Asos, Marks and Spencer, House of Fraser, River Island). Moreover, as mentioned earlier, they recently founded a fashion technology academy with the aim of generating manufacturing skills (e.g., stitching and pattern cutting) and supporting employment in the local area.

To summarize this section, over the years, the presence of a poor and weak manufacturing environment, which has been unable to meet the specific needs of small-sized local designer fashion firms, has been a serious concern for the purpose of a flourishing designer fashion industry. However, after a long period of severe decline and contraction that lasted about 40 years, London's fashion manufacturing base has now been experiencing a first recovery with a growth in terms of employment and number of firms. In particular, it seems to be more responsive to local fashion designers' needs. Nowadays, the fashion productive system is

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[41] Fashion Enter Ltd is associated with FashionCapital.co.uk, which is a portal for the industry that supports local designers in translating their creative ideas into reality, through a dedicate team of journalists, business advisors and industry experts.

[42] In 2001, the LDA funded the 'London Fashion Forum', which was a non-profit company aimed at developing strategies for the fashion industry, and formed by fashion industry representatives, businesses, the national government, and the education sector. This company together with the LDA created the 'London Apparel Resource Centre', which was an incubator focused on the fashion industry, where members could have access to facilities, skill development, training, mentoring, and business support (Montgomery, 2007).

mostly comprised of micro-establishments, which include between 1 and 4 employees. Most of the producing firms manufacture wearing apparel, with a particular emphasis on women's outwear, and are highly concentrated in the East part of London. Notwithstanding an initial revitalization of the sector, there is still a general perception that institutions tend to support poorly local fashion production and that a large-scale manufacturing will never be part again of the local fashion ecosystem.

3.4. The central role of London's fashion design schools

The aim of the present section is to explore the function and character of the local fashion education system, and more specifically of London-based Higher Education Institutions (HEIs) specialising in fashion design, in order to understand their contribution to the local economy and how they fit into the peculiar nature and structure of the local fashion ecosystem.

Nearly all respondents referenced the education system as the real engine of the local fashion economy and as the factor that mostly contributes to determining the city's position as an internationally acknowledged centre for fashion. Starting from the mid-twentieth century, the Royal College of Art and Central Saint Martins have provided courses in fashion design and have contributed to determining the reputation of London as a significant location for the production of talented fashion designers (Breward et al., 2004). Still nowadays, these fashion schools in addition to other academies like the London College of Fashion and Westminster University have a global reputation for being the best in the world, as well as for generating the most innovative and creative talent. John Galliano, Alexander McQueen, Stella McCartney, and Christopher Bailey are just some of those fashion designers who have emerged from these colleges over the last few decades (British Fashion Council, 2010; 2012; Virani and Banks, 2014). These schools are capable of attracting the best students from all over the world. As an example, 58% of fashion design students enrolled in graduate courses at the London College of Fashion come from outside Europe. The same value accounted for 60% at Royal College of Art and 31% at Central Saint Martins (Business of Fashion, 2016).

London is internationally acknowledged for being an important place of learning, particularly for creativity and design. In the academic year 2014/2015, there were 39 higher education providers[43] (of 165 in UK) and 369,900 students (postgraduate and undergraduate), who

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[43] The term includes all publicly funded universities and other HE institutions in the UK. In particular, the University of London is made up of other 18 universities (HESA, 2017).

accounted for 16% of total UK students (2.3 million). Together with Business & Administrative Studies (14%) and Allied Healthcare (12%), Creative Arts and Design (12%) was regarded among the most popular subjects in London, accounting for around 44,000 students (GLA, 2015). This subject area (JACS[44] code W) includes not only programmes within Creative Arts and Design, but also Fine Art, Design Studies, Music, Drama, Dance, Cinematic and Photography and Crafts. Fashion-related courses are included within the (W2) Design Studies subject.

Table 3.6 shows the number of students enrolled on (W2) Design Studies in UK and London in 2014/2015, by 4-digit JACS subject. In UK, 64,420 students were enrolled on Design Studies, whereas 13,710 students undertook (W230) Clothing/Fashion Design studies. Some students in fashion may have been classified under the broader category of (W200) Design Studies, which accounted for 15,915 people, whereas 3,720 students were engaged in (W231) Textile Design courses. In the same academic year, 16,535 students undertook (W2) Design Studies in London. The majority of students were engaged in (W200) Design Studies or (W230) Clothing/Fashion Design, which both accounted for around 21.5% of the total subjects included in the W2 category. As far as fashion-related subjects are concerned, 3,535 students were enrolled on (W230) Clothing/Fashion Design, and 705 on (W231) Textile design. Moreover, 3,550 students undertook (W200) Design studies, which may include also fashion-related subjects. Overall, 7,790 students (47% of W2 Design Studies) were engaged in fashion-related subjects (considering also the broad category W200). Both in UK and London, together with (W200) Design Studies, (W230) Clothing/Fashion Design represented one of the most popular subjects in the broader (W2) Design Studies category.

Table 3.7 displays the number of students enrolled on fashion-related studies (W200, W230, W231) by HE provider in London. There are 15 HE providers offering fashion design courses in London. According to these figures, 48% of fashion-related students were enrolled at the University of the Arts London, of which 2,085 on (W230) Clothing/Fashion Design, 550 on (W231) Textile Design, and 1,125 on the broader category (W200) Design Studies. The Royal College of Art, University of Westminster, and Middlesex University registered also a high number of fashion-related students (respectively 930, 605 and 510) ('Personal Data' from HESA, 2016; 2017).

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[44]The Joint Academic Coding System (JACS) is a method for classifying academic subjects used by the Higher Education Statistics Agency (HESA) and the Universities and Colleges Admission Service (UCAS).

Moreover, according to the Global Fashion School Ranking 2016[45] (Business of Fashion, 2016), which measures schools by global impact, learning experience and long-term value, the London-based universities of Central Saint Martins, Royal College of Art, London College of Fashion and Kingston University were all ranked in the top ten of the best fashion undergraduate and graduate programs in the world. According to this ranking, London-based fashion schools performed better than US and Italian education institutions in terms of influence, reputation, selectivity and student satisfaction, confirming the supremacy of London's fashion education system in the world.

Table 3.6. Number of students enrolled on (W2) Design Studies, UK and London, 2014-2015

(W2) Design Studies	United Kingdom		London		Percentage of London on United Kingdom
4 Digit JACS subject	Number of students	Percentage on total	Number of students	Percentage on total	
(W200) Design studies	15,915	24.7	3,550	21.5	22.3
(W230) Clothing/fashion design	13,710	21.3	3,535	21.4	25.8
(W240) Industrial/product design	5,035	7.8	2,255	13.6	44.8
(W210) Graphic design	9,505	14.8	2,180	13.2	22.9
(W213) Visual communication	3,160	4.9	1,025	6.2	32.4
(W220) Illustration	4,980	7.7	1,025	6.2	20.6
(W250) Interior design	3,755	5.8	990	6.0	26.4
(W231) Textile design	3,720	5,8	705	4.3	19.0
(W290) Design studies not elsewhere classified	1,485	2.3	500	3.0	33.7

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[45] The global fashion school ranking (BOF, 2015) is aimed at providing an assessment of the best undergraduate and graduate fashion programs around the world. It is based on data gathered from 24 participating fashion schools in 11 countries, 4,032 students and alumni, HR professionals and global fashion influencers and international fashion prize analysis.

(W280) Interactive & electronic design	1,795	2.8	430	2.6	24.0
(W260) Furniture design	325	0.5	150	0.9	46.2
(W212) Multimedia design	710	1.1	120	0.7	16.9
(W270) Ceramics design	185	0.3	70	0.4	37.8
(W211) Typography	140	0.2	-	-	-
Total	64,420	100.0	16,535	100.0	25.7

Sources: Author's elaboration using data from HESA (2016, 2017) – 'Personal data' from Students in Higher Education Providers 2014/2015.
Notes: All data are rounded to the nearest multiple of 5 for the purpose of data protection.

Table 3.7. Number of students enrolled on fashion-related studies by HE provider, London, 2014-2015

HE provider	4 Digit JACS			
	(W200) Design studies	(W230) Clothing/fashion design	(W231) Textile design	Total
University of the Arts, London	1,125	2,085	550	3,760
Royal College of Art	930	0	0	930
The University of Westminster	420	185	0	605
Middlesex University	115	395	0	510
Goldsmiths College	365	15	0	380
Kingston University	70	270	0	340
Ravensbourne	0	275	0	275
The University of East London	0	200	75	275
London Metropolitan University	125	30	80	235
The University of Greenwich	225	0	0	225

Brunel University London	95	0	0	95
The University of West London	0	80	0	80
City, University of London	45	0	0	45
Roehampton University	30	0	0	30
Institute of Education	5	0	0	5
Total	3,550	3,535	705	7,790

Sources: Author's elaboration using data from HESA (2017) – 'Personal data' from Students in Higher Education Providers 2014/2015.
Notes: All data are rounded to the nearest multiple of 5 for the purpose of data protection.

3.4.1. Strengths and weaknesses of London's fashion education system

The high importance of local schools specialising in fashion design in acting as fundamental drivers for attracting and generating highly creative human capital, raises the essential question of what the key features of this specific education system are.

London-based HEIs specialising in fashion design function as creators of symbolic and social capital for students, who wish to become internationally acknowledged fashion designers (Rieple and Gornostaeva, 2014). These schools hold strong legitimising power, and the qualifications achieved at these schools are highly valued in the international market, contributing to building the initial reputation of aspiring fashion designers. In turn, the acknowledgment of extremely talented individuals who have graduated from these institutions contributes to attracting more creative talents, who wish to become successful and exploit the symbolic value attached to London and its education system. In this regard, many respondents highlighted how the outstanding reputation of successful fashion designers who are associated with London's fashion schools, such as Alexander McQueen with Central Saint Martins, functions as a powerful engine for attracting new students to local educational providers. Additionally, these HEIs encourage students to take part in local fashion showcase events, like the London Fashion Week, in order to obtain legitimisation of their products. Therefore, they act as a significant means of achieving visibility and recognition among the local industry and consumers, as well as for networking with key actors in the sector. In this respect, graduate fashion shows function as very important platforms for students who want to show their collections and gain media attention in the early stages of their career (BFC,

2012).

However, the global reputation of these HE providers is mostly attributed to the appreciation of creativity and artistic values, and to a conceptual approach to fashion that supports high levels of experimentation and originality, together with the absence of aesthetic rules. Fashion design courses in London are generally taught within prestigious colleges of arts or multidisciplinary universities (e.g., University of the Arts London, Westminster University) and this strongly affects the peculiar nature and form of education provided. Firstly, students benefit from a great interaction in terms of knowledge sharing with students and staff from different creative disciplines such as arts, photography, music, and journalism. Secondly, these institutions tend to regard fashion more as a form of art than a form of economic production, where values linked to creativity are perceived as more important than economic interests associated with the logics of the market. These colleges are highly innovative and creativity-oriented and encourage the development of new ideas and ways of thinking.

'*It is really important to create, maintain and protect spaces where creativity and experimentation can flourish without a primary commercial concern, where people can test out things without taking too much of a risk initially. Art schools have an important role to play in offering this kind of environment and to nurture a creative mind set. Many of them incorporated into larger multidisciplinary universities, where fashion design is one of the subjects within a broader creative arts portfolio. It plays a role in widening students' experiential and cognitive horizon towards creative insights and skills, and offers a conceptual and critical, yet practice-based approach to fashion that supports probing and experimenting. We focus on the design values that drive London as a fashion city*' (Personal interview with Head of Educational Institution 4).

Fashion design education in London is primarily centred on teaching students how to express their artistic creativity and originality, open up their imagination and experiment 'conceptual' innovation. Fashion designers graduating from these schools are more interested in a 'fashion to be seen' than in a 'fashion to be worn', and usually regard the entire system of industrial production, as well as artisanal and manual jobs as marginal activities (McRobbie, 1998; Volonté, 2012; Rieple and Gornostaeva, 2014). Moreover, they are more risk-taking and tend to break the boundaries producing collections that are 'out of the box' and valuing more originality and high levels of creativity than the marketability of products. The teaching

method of these schools is extremely oriented at pushing students out of their comfort zone, providing high levels of freedom and the absence of rigid rules, which allow them to risk, fail and define their own personal design identity. This open and stimulating education environment is primarily aimed at promoting the figure of the individual creative fashion designer, giving less attention to other managerial or technical job positions in the sector, such as garment technologists, pattern cutters and logistic specialists (D'Ovidio, 2010; Shi et al., 2012). A number of respondents stressed the high willingness of fashion design students to open their own companies and develop a personal collection rather than working as employees within large and established fashion houses.

'Many of our graduates try and set up their own companies and develop their own collections. Whether they are successful or not is another question, but there is that entrepreneurial spirit that supports the production within London and the wider UK' (Personal interview with Head of Educational Institution 4).

On the downside, as already shown in previous studies, many respondents highlighted a gap in the provision of business capabilities (McRobbie, 1998; Volonté, 2012). The strong focus on creative and artistic values is naturally in contrast with more economic and technical aspects of the industry. Most of the creative students graduating from London's fashion schools do not have an adequate understanding of business strategies, which are necessary to attract investments, gain market attraction and compete into the global market. Moreover, these schools do not generally emphasize know-how, artisan, and technical skills (e.g., stitching, pattern cutting, pressing, finishing), which are useful in making wearable and viable collections. Managerial and technical aspects of the industry are generally marginal to the local fashion education system, although these are extremely important for designers to learn how to establish a sustainable business. However, many respondents did not regard it as a real concern, since creative values are perceived much more significant and difficult to develop and nurture as compared to business-related or more technical aspects of the industry.

'Education gives you a platform to show your work to the industry so that you can start getting into the industry. But it does not provide business support. You are learning everything in terms of running a business or a label as you go along (...). But I think it is good because when you are studying you are working on being creative and having a strong design identity, and without that you cannot really have a label'. (Personal

interview with fashion designer 1)

'There has always been a gap between the moment of education and the moment of business. You cannot teach business alongside design really well. I do not think the industry needs more people who understand the industry. I think if you are going to have your business you can learn some basics, but you have to learn yourself. I want that students come here mostly to examine their sense of design and develop their vision and opinion'. (Personal interview with Head of Fashion of Educational Institution 2)

In recent years, the increasing awareness of this weakness has led a number of HE providers specialising in fashion design to increase the number of entrepreneurial and managerial courses in order to help students to set up and commercially support new businesses (BFC, 2012). As an example, in 2015, in response to the recognition of the increasing importance of the link between fashion, business, and education, London College of Fashion launched a Fashion Business School, which offers a range of courses in disciplines related to fashion business such as Fashion Design Management, Fashion Entrepreneurship, and Innovation and Fashion Enterprise Creation.

'In the past design became divorced from business and production. For us this was one of the reasons why we established a Master's in Fashion Business Management to help creative to develop the necessary business skills in order to establish their own business. The management courses sit in proximity to fashion design so that the business people understand the creative side, but also that there is cross fertilisation to the design students towards understanding more of the wider industry. The relationship with the industry is really important for our fashion design course' (Personal interview with Head of Educational Institution 4).

In sum, the interview process showed how the local fashion education system mostly contributes to determining the city's position as a renowned centre for fashion. It is highly oriented towards forms of teaching that emphasize individual creativity, experimentation and aesthetic values in fashion, and partially neglect more 'physical' business, technical, and industrial practices. Fashion design courses in London are generally taught within prestigious colleges of arts or multidisciplinary universities, and fashion is perceived more as a form of art than of economic production. The system is centred on the figure of the creative

independent fashion designer, who aspires to open his own business and to produce collections that are extremely original and innovative. Moreover, students who choose London's fashion HEIs are in part motivated by the opportunity to be symbolically associated with the prestigious image of these institutions and of its alumni. This distinctive form of education has implications on the nature and character of the entire local fashion ecosystem.

3.5. The 'dark side' of creativity: 'Brain drain' of creative fashion talent?

A very high proportion of respondents emphasised that one of the main weaknesses of London's fashion system originates from its extremely creative environment. In fact, unlike Paris, Milan, and New York, London lacks a deeply rooted culture of fashion businesses and a fertile soil for nurturing the growth of independent designer fashion firms. As a result, in recent years, many fashion designers have moved not only to the outskirts of London, but also to other parts of Britain and other major and minor fashion cities outside the UK (e.g., Antwerp, Berlin, Barcelona, Paris, Stockholm), in order to find employment in large European and American fashion houses or to set up their own businesses.

Firstly, the lack of global awareness of the fashion industry reality may lead students graduating from local HE providers to be hardly integrated in the culture of the global fashion economy. In fact, the sense of individual and independent creativity, which is highly fostered in London-based fashion schools, is largely disconnected from the logics of production and from collective and collaborative forms of creativity that are required in large established fashion houses. Moreover, with the exception of Burberry, in London there are no fashion companies large enough to support the number of graduates originating from the local education system (Jones, 2005), and immigration limitations may also prevent a number of international students to definitively settle in London for work purposes (BFC, 2012). In this respect, the movement of the famous London-trained fashion designers Stella McCartney, McQueen, and John Galliano to French houses may reveal the failure of the British fashion industry to support local fashion talent, and its commercial insignificance in terms of promoting fashion culture and global brands (McRobbie, 1998; 2000; Crewe and Goodrum, 2000; Gilbert, 2000).

'I think creativity is one of its positives, but it's also one of its negatives in many ways. We tend to generate an awful pool of very creative people who are very good at fashion

design, but they're not very good at running fashion businesses. The number of fashion business failures in the UK is very high and the vast majority of those are based in London' (Personal interview with Managing Director of Institution 3).

'As part of our history as a country, we are great at coming up with ideas, but you do not have to necessarily build a big brand. In a way we have been quite careless with talent that comes through. The talent often goes to work all over the world in other countries and companies' (Personal interview with Head of Fashion of Educational Institution 3).

Secondly, the nature of a system primarily oriented towards creativity and artistic values does not facilitate the setting up and consolidation of individual firms. As discussed earlier, the environment lacks a strong manufacturing base that is highly significant to designer fashion firms, particularly those in the early stages of their life. Moreover, designers who complete their studies do not have business, managerial, and practical competences for establishing their own companies. There exists a 'creativity-business tension' in the fashion industry (Virani and Banks, 2014). The development of highly creative values, which are often in contrast with the logics of the market, makes it difficult to facilitate the translation of artistic and innovative ideas into marketable products. In this regard, BFC (2010) highlighted that the existence of high business failure rates in the designer fashion industry was due to lack of training and under-developed business skills.

'The weakness is the flip side of its strength (…). It is very hard for any fashion business to mature (…). Other capitals have got strengths that help them, they have got manufacturing, or they are very much about commerce. London is all about new designers with new ideas who are pushing fashion somewhere different (…). It is challenging to be commercial'. (Personal interview with Head of Fashion of Educational Institution 4)

Furthermore, the incredibly high cost of living and difficulties of raising the initial working capital are other elements that have contributed to making London a difficult ground for setting up new designer fashion businesses (Virani and Banks, 2014; Abnett, 2016). In particular, the environment for fashion designers is growingly difficult because the city has become more expensive than in the past. Many respondents referenced this issue as one of the

main difficulties associated with establishing new businesses in London, especially in terms of lack of affordable rents and an undersupply of housing. Additionally, due to the highly risky nature and the small-sized structure of fashion businesses, some of the independent designers interviewed emphasised the difficulties of obtaining financial support from banks. In part as a consequence of their precarious financial situation, in the last fifteen years, many fashion designers have started moving their studios and workshops in less expensive areas like Shoreditch and Hackney.

In this regard, property prices have long driven locational choices of creative people in world cities (Landry, 2001). Through the twenty-century, the decline of traditional manufacturing industries in these areas left a number of neighbourhoods endowed with a large availability of derelict industrial buildings, which have attracted creative communities of young artists, creative workers, and fashion designers looking for inexpensive and affordable workspaces (BOP Consulting, 2010). Moreover, targeted initiatives aimed at regenerating these areas have further contributed to the attraction of creative people. As an example, the 'City Fringe Partnership', which was established in the mid-1990s, has promoted several regeneration projects in the East End and White Chapel. Over the years, this area has developed into a creative hub with over 200 small creative businesses including fashion designers, artists, graphic designers, architects, photography, and recording studios (Montgomery, 2007). Still nowadays, the East part of London hosts a dense concentration of creative hubs or co-working spaces for creative people such as Bow Arts, Hackney Downs Studios and Trampery London Fields.

However, the process of gentrification has gradually led these creative hubs to become increasingly expensive and designers have started looking for new studios in more affordable areas outside London or Britain (Breward and Gilbert, 2008). Therefore, unless the availability of private capitals or financial prizes from awards and competitions schemes, the decision of establishing independent designer fashion companies in London is still possible only for few designers. Moreover, previous studies have showed how it often requires the option to hold more jobs at the same time, in order to deal with high economic insecurity, instability and the precarious nature of fashion designers' jobs (McRobbie, 1998; Evans and Smith, 2006; McRobbie et al., 2016). To respond to these issues, many local institutions have promoted targeted initiatives to encourage the retention of fashion design students in the city and to foster the development of a growing designer fashion sector.

'*Last year, we decided to move our studio from East London to Kent because it was so much cheaper (...). There are a lot of people like us who have made the decision to move businesses outside London because it is hard to cover all running costs. London is very expensive (...). You pay a premium for being located here and that is challenging as a small business*' (Personal interview with fashion designer 2).

'*What is difficult for fashion companies here is getting investment. It is really difficult to get banks to lend you money (...). As soon as you want to increase in size it becomes really difficult*' (Personal interview with fashion designer 3).

Table 3.8 shows the number of students enrolled on fashion-related studies by location of employment in London in 2014/2015. Out of 425 students who undertook (W230) Clothing/Fashion Design Studies in 2014/2015, 35.3% found employment out of London, particularly in the rest of the UK. As far as overall fashion-related subjects are concerned, 34.4% of students (out of 1,095) were employed out of London six months after the completion of their studies. In addition, Table 3.9 illustrates the typology of employment of HE leavers. Out of 1,095 students who completed their studies in London in fashion-related subjects, the majority were employed on a permanent or open-ended contract (490 students) or as self-employed/freelance (245 students). Moreover, among all the leavers considered, only 45 started their own business in London ('Personal Data' from HESA, 2017). Thus, these data reflect a slight trend of London-trained fashion design students migrating towards other cities or countries after the completion of their studies. Moreover, data also shed light on the small number of students who decide to open an own fashion design business in London. These data have been personally provided by HESA from the Destinations of Leavers from Higher Education Providers 2014/15 (DLHE) dataset[46], which is a survey that provides information about the employment and further study activities of local HE leavers, approximately six months after completing their studies.

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[46] The survey, which is undertaken by means of a questionnaire, collects information about the location of employment, as well as the typology of the industry, sector, and occupation. The entire survey includes two reporting periods that reflect the two main course completion times for students (April and January). The response rates are set to ensure that data are suitable for publication and that the results genuinely reflect the outcomes for students leaving HE providers (HESA, 2017).

Table 3.8. Number of students enrolled on fashion-related studies by Location of Employment, London, 2014-2015

Fashion-related studies	Location of employment						Percentage of students employed	
4 Digit JACS subject	London	Rest of the UK	Other EU	Non-EU	Not Known	Total	London	Out of London
(W200) Design studies	365	90	30	70	5	560	65.2	34.8
(W230) Clothing/fashion design	280	85	25	30	10	430	64.7	35.3
(W231) Textile design	75	20	5	5	0	105	71.3	28.7
Total	720	195	60	105	15	1,095	65.6	34.4

Sources: Author's elaboration using data from HESA (2017) – Personal Data from Destinations of Leavers from Higher Education Providers 2014/15 (DLHE).
Notes: All data are rounded to the nearest multiple of 5 for the purpose of data protection. Rest of the UK includes the Channel Islands, Isle of Man, and UK unknown.

Table 3.9. Number of students enrolled on fashion-related studies by Employment Basis, London, 2014-2015

Employment basis	4 Digit JACS subject 3.0			
	(W200) Design studies	(W230) Clothing/fashion design	(W231) Textile design	Total
On a permanent or open-ended contract	240	215	35	490
Self-employed/freelance	140	80	25	245
On a fixed-term contract lasting 12 months or longer	40	30	0	75
On a fixed-term contract lasting less than 12 months	35	30	10	70
On an internship/placement	30	20	20	70
Starting up own business	25	20	0	45

Temping (including supply teaching)	15	10	5	30
Other	10	10	5	25
Developing a professional portfolio/creative practice	10	5	5	20
On a zero hours contract	10	5	0	15
Voluntary work	5	5	0	10
Total	560	430	105	1,095

Sources: Author's elaboration using data from HESA (2017) – Personal Data from Destinations of Leavers from Higher Education Providers 2014/15 (DLHE).
Notes: All data are rounded to the nearest multiple of 5 for the purpose of data protection.

3.5.1. Local intervention in the designer fashion industry

In London, there exists a strong infrastructural support for fashion design firms. In recent years, a number of private and public institutional actors have worked together with local government and higher education institutions to sustain the local designer fashion industry, notably the growth and development of emerging designer fashion businesses. In particular, these actors currently support fashion designers in building up relationships, getting funding, showcasing fashion collections, as well as through the provision of mentoring, resources, and knowledge. They strongly contribute to the launch of young and emerging fashion talent, notably through financial support and in the organization of showcase events and talent identification schemes.

As an example, the British Fashion Council (BFC), which was created in 1983, is a not-for-profit organization that promotes local fashion design internationally and supports designers at the various phases of their businesses. It functions as a significant connector between fashion designers and cultural intermediaries involved in the fashion design process. In particular, it is in charge of the organization of the London Fashion Week and of NEWGEN, which is one of the most important talent identification schemes aimed at sustaining young fashion talent through financial, business, and mentoring support to showcase at the London Fashion Week. This specific program has contributed to the success of internationally renowned fashion designers such as Alexander McQueen, Boudicca, and Christopher Kane.

Similarly, the Centre for Fashion Enterprise (CFE) is a pioneering business incubator (started

by LCF in 2003 and supported by London Development Agency) aimed at sustaining emerging fashion talent in the growth and development of their businesses, providing them with assistance in the field of finance, legal, marketing and manufacturing. Virani and Banks (2014) identify 21 London-based organizations that support fashion design firms and divide these into fashion incubators and partial-support organizations. In addition to BFC and CFE, other organizations like 'Fashion East', 'Centre for Sustainable Fashion', 'Fashion Fringe', 'Fashion Trust', 'Fashion Forward', and 'Trampery Fashion Lab' provide further assistance to designers from the development of businesses to the showcase of collections.

'Institutions are a wealth of knowledge in terms of anything you need. They are very good at building up a very personal relationship with each designer. If you need funding they can put you in touch with the right people for funding. And they organize seminars and talks to help you if you have got any question' (Personal interview with fashion designer 4).

'In London now there are really good support schemes for young designers. I got NEWGEN support otherwise I would not be able to do this (…). I think that there is a lot of support for young designers' (Personal interview with fashion designer 1).

3.5.2. Measuring the designer fashion sector

To this day, it is not easy to analyse the 'designer fashion' sector with a high degree of reliability. According to a Mintel's definition (2002), this sector includes couture (i.e., the original designer market), international designers (i.e., a label usually dominated by one name), diffusion (i.e., designers producing high-streets ranges for specific stores), and high-fashion (i.e., up and coming new designers). A substantial body of research has already highlighted the difficulties in the use of the Standard Industrial Classification (SIC) and of its international equivalents to capture specialist activities in the creative industries, such as the designer fashion sector. In fact, there are no dedicated SIC codes associated with fashion design and, according to the latest SIC 2007, it is not possible to separate this element from the broader category 74.10 'Specialised Design Activities' with a reasonable degree of accuracy (Creigh-Tyte, 2005). Moreover, elements of designer fashion may be included in most of the clothing and footwear manufacturing-related codes.

To alleviate these difficulties of estimation, DCMS (2010, 2011, 2015, 2016) introduced some 'weightings' to a range of SIC codes in order to identify and capture the 'fashion design' element. More specifically, in its annual economic estimates, DCMS analysed the designer fashion industry using a proxy and considering a tiny fraction of clothing and footwear manufacturing activities and of a residual category that includes all the activities related to business services not included in more specific classes. In particular, following the latest SIC 2007[47], DCMS analysed such sector considering a small portion (0.5%) of ten clothing manufacturing codes (codes: 14.11, 14.12, 14.13, 14.14, 14.19, 14.20, 14.31, 14.39, 15.12, 15.20) and a fraction (5.8%) of 'specialised design activities' 74.10[48]. In this regard, Creigh-Tyte (2005) observed how the use of such 'scaling factor' applied to manufacturing codes and other business activities is very unclear, and the weight of the sector varies according to the source considered. Moreover, the inclusion of clothing production codes, which may have a low design content, can lead to an overestimation of the designer fashion sector. Therefore, to date, there is not a reliable database for this specific sector and all the estimates have to be taken into account with a high degree of caution.

However, the annual creative industries economic estimates (CIEE) produced by DCMS in 2011 can be useful to make some general comments on the weight of the designer fashion sector on the overall creative economy in London. Table 3.10 shows that, in 2011, there were 106,710 creative enterprises in United Kingdom, and 37,890 in London. Both at country- and regional level, the designer fashion sector had the second smallest quantity of enterprises for the creative industries, after the Digital & Entertainment Media sector, which accounted for the smallest portion of total creative industries. More specifically, UK registered 870 companies, accounting for 0.9% of total creative industries, and 0.04% of total industries in UK (2,080,860). It is interesting to observe that around 30% of UK designer fashion industries were located in London, which, however, showed a relatively small designer fashion sector, accounting for 0.7% of local creative industries and 0.08% of total local industries (334,395) (DCMS, 2011).

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[47] According to SIC 2003, DCMS takes into account a small proportion (0.5%) of nine manufacturing codes (codes: 17.71, 17.72, 18.10, 18.21, 18.22, 18.23, 18.24, 18.30, 19.30), and a portion (2.5%) of the code 74.87 'other business activities not elsewhere classified'.

[48] Although the 74.10 code is not still available at any greater level of detail than the 4 digit-level, the introduction of this less general class has allowed to define 'designer fashion' more accurately than previously (DCMS, 2010).

Table 3.10. Number of enterprises by creative sector in United Kingdom and London, 2011

Creative Sector	Number of enterprises		Percentage of enterprises	
	United Kingdom	London	United Kingdom	London
Advertising	16,010	4,660	15.0	12.3
Architecture	11,700	2,790	11.0	7.4
Art & Antiques	2,580	520	2.4	1.4
Design	14,720	4,210	13.8	11.1
Designer Fashion	970	280	0.9	0.7
Film, Video & Photography	10,360	5,120	9.7	13.5
Music & Visual and Performing Arts	30,460	13,290	28.5	35.1
Publishing	9,700	2,520	9.1	6.7
Software/Electronic Publishing	1,810	350	1.7	0.9
Digital & Entertainment Media	440	120	0.4	0.3
TV & Radio Total	7,960	4,030	7.5	10.6
Total	106,710	37,890	100.0	100.0

Sources: Author's elaboration based on Department for Culture, Media and Sport's economic estimates (2011) from Inter-Departmental Business Register (IDBR).
Notes: Data are defined in terms of 13. Manufacture of Textiles, 14. Wearing Apparel and 15. Manufacture of Leather and Related Products (SIC 2007).

More recently, BOP Consulting (2017) adopted a 'mixed method' approach to fashion design, which includes a number of proxies (e.g., the number of self-declared fashion designers who are located in London on Linkedin - over 3,500) to estimate the employment and value of London's designer fashion industry. According to these figures, in 2015, London accounted for 5,100 designers, generating a GVA of £541 million. In particular, in the period from 2010 to 2015, the sector registered an increase of 44% in terms of employment (from 3,500 to 5,100) and 69% in terms of GVA (from £202 to £341 million). Although both these analyses show different results and need to be analysed and discussed with caution, it may be assumed that London does not present an extensive designer fashion sector. Undoubtedly, more accurate analyses are required to identify the significance and value of this sector with a higher degree of reliability.

In sum, the highly creative environment that characterises this fashion ecosystem has negative implications on the development and growth of a flourishing designer fashion industry. Firstly, the nature of a fashion industry primarily centred on creativity and artistic value and that

suffers from a lack of strong manufacturing base does not easily allow graduated students to establish their own fashion design firms and to be integrated in the culture of large fashion businesses, which are also scarce in the local territory. Secondly, the high cost of living, lack of affordable rents, and difficulties of raising the initial working capital have further complicated the establishment of new small-sized fashion design businesses. Notwithstanding the growing level of support from local institutions, many graduated students and fashion designers have started moving to the outskirts of London and to other cities within and outside of the UK. Moreover, although it is still very hard to exactly measure it, it may be assumed that the local designer fashion industry is not very extensive.

3.6. The creation of urban symbolism: The role of retailing, media and events

A number of cultural intermediaries are continuously involved in the process of legitimisation of local fashion and in the creation and dissemination of fashion-related images that symbolically anchor fashion to London (Gornostaeva et al., 2014). The aim of this section is to explore how place-based narratives about fashion are generated and spread in the local fashion ecosystem, as well as how these contribute to perpetuating the status of London as a distinctive fashion city in the world. In particular, the interview process highlighted how retailing, media system, showcase events, and museum institutions act as significant identity-creators for London's fashion. The following sub-sections explore the role that these elements play in building and communicating the image of London as a major fashion centre.

3.6.1. Generating economic and symbolic value through fashion retailing

London has a very strong retailing history and is regarded as one of the major destinations for tourists from around the world. In particular, it hosts some of the most prestigious world's fashion districts such as New Bond Street, Sloane Street, Mayfair and Knightsbridge, which are the house of high-end boutiques and fashion luxury brands of both British and international origin. A large number of international and local fashion houses aspire to open their flagship stores in the city, in order to benefit from the positive symbolic association of London with fashion (Gilbert 2000). Internationally known department stores and a huge variety of high street shopping opportunities (e.g., Oxford street, Kensington High Street) contribute to the creation of a powerful fashion retail sector (Oxford Economics, 2010; Virani

and Banks, 2014). Moreover, new important hubs for independent fashion retailers and designers have emerged in East London, particularly in Hackney and Shoreditch. This area attracts an increasing number of tourists who look for cutting-edge, extravagant, and innovative collections from emerging fashion designers. Additionally, 'Hackney Walk', which was launched in September 2016 as part of the regeneration process of East London, is a luxury outlet village combining fashion retail (with brands like Nike, Bally, Aquascutum and Burberry), studio space, and commercial office.

At country level, Oxford Economics estimates (2010) showed that over 22% of total retail GVA in United Kingdom is associated with the fashion industry. In the same year, fashion retail in London registered a GVA of £2.45 billion with a value of employment of 93,500, which rose to £3.45 billion in 2015 (employment of 117,100) (BOP Consulting, 2017). Therefore, according to these data, fashion retail in London accounted for 56% (in 2010) and 61% (in 2015) of total economic value of overall London's fashion sector, which includes design, manufacturing, retail, advertising, and distribution. More specifically, Table 3.11 shows that fashion retail contributes around 10% (in terms of employment) and 7% (in terms of establishments) to total values associated with the overall retail category in London. Moreover, Figure 3.4, which displays the overseas retail spending in 2013 in London, demonstrates that fashion retail registered the highest amount of spending by overseas tourist (£2,7 billion), and was forecasted to rise to £3.8 billion in 2017.

Unlike London's fashion manufacturing base, medium- and large-sized companies have dominated retailing and wholesaling. 'It is therefore the distributors, rather than the producers, who dominate the industry' (GLC, 1985, p. 124). Nowadays, London is the home of numerous large fashion retailers. For example, the Arcadia Group, which is headquartered in London, controls a high number of high street clothing retailers like Burton, Dorothy Perkins, Evans, Miss Selfridge, Outfit, Topshop, Topman, and Wallis. The online fashion retailer Asos, which sells more than 80,000 branded and own products, is also headquartered in London. Moreover, a number of retail store chains like Reiss, Ted Baker, All Saints, Whistles, and Jaeger have their head offices in the city, which also hosts several internationally known department stores like Harrods, Selfridges, Liberty, John Lewis, House of Fraser, Fenwick, Fortnum & Mason and Debenhams. Besides, Westfield London, after its recent planned £600 million expansion, has just become the largest shopping centre in Europe (The Guardian, 2017).

Table 3.11. Employment and establishments trend in retail and fashion retail for London, 2010-2016

Year	Establishments			Employment		
	Retail	Fashion Retail	Percentage of Fashion Retail on Retail	Retail	Fashion Retail	Percentage of Fashion Retail on Retail
2010	71,300	5,500	7.7	373,072	39,330	10.5
2011	69,500	5,400	7.8	361,162	39,480	10.9
2012	79,800	5,500	6.9	369,868	41,185	11.1
2013	80,000	5,400	6.8	377,632	41,650	11.0
2014	77,800	5,600	7.2	386,760	43,145	11.2
2015	80,100	5,800	7.2	406,733	44,155	10.9
2016	85,900	5,900	6.9	426,682	44,980	10.5

Sources: Author's elaboration using data from Business Register and Employment Survey (BRES) and UK Business Counts (Local Units) - Office for National Statistics (ONS).
Notes: Data on establishments (i.e., local units) come from the UK Business Counts (Local Units) (2010-2016). Note that data on employment are rounded to the nearest 100 according to the disclosure rules of BRES (2015). Data are defined in terms of 47.71. Retail sale of clothing in specialised stores, 47.72. Retail sale of footwear and leather goods and 47.82. Retail sale of clothing and footwear on stalls and markets (SIC 2007).

Figure 3.4. Overseas tourist retail spending by sector in London, 2013 and 2017 (in million GBP)
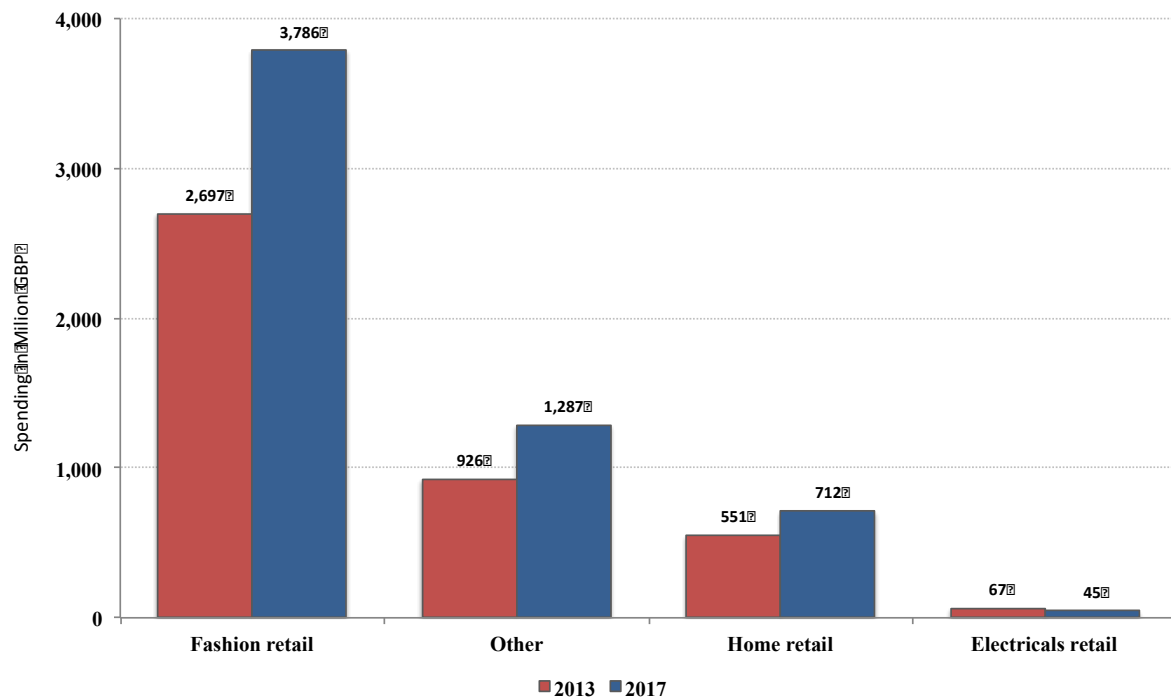
A large part of respondents referenced fashion retail as a significant factor in defining the image of London as a major fashion city in the world. In addition to high street opportunities, temporary and permanent shops of independent fashion designers located in East London seem to play an important role. In particular, in 2015, fashion retail in this area accounted for a GVA of £659 million, with a value of employment of 20,700 (BOP Consulting, 2017). Fashion retail has largely contributed to the redefinition of social and economic practices in the Britain post-industrial period. However, the emergence of giant retailers in the 1980s has made high streets increasingly indistinguishable and has generated the need for fostering local identity and distinctiveness in order to make London more attractive to tourists and consumers. This, in turn, has led to the emergence of many independent fashion retailers selling original, innovative and high-quality fashion design, which is capable of defining powerful cultural symbols and images (Crewe and Forster, 1993). In this respect, interviewees highlighted how the reputation of London is primarily associated with the presence of extremely creative fashion designers, who tend to break the boundaries with risky and original collections and little attention to commerciality in terms of costs and wear-ability.

'It's a huge shopping destination for all sorts of people (...). You know people fly in from China just to come shopping in London. So there's the retail aspect in terms of its global perception, but also because there lots and lots of really good independent shops, if you know where to go to find them' (Personal Interview with Managing Director of Institution 3).

Moreover, one of the key features of London's fashion system is the significant level of collaboration between local retailers and fashion designers. On the one hand, retailers discover and support talented emerging designers providing them with space to show their fashion collections. In this way, they aspire to achieve greater reputation thanks to the discovering of the latest talent on the national or international stage. On the other hand, fashion designers 'discovered' by retailers have the opportunity to build their symbolic capital and achieve global acknowledgment in the international fashion scene. In this regard, in recent years, some high-street retailers such as Top Shop, New Look, River Island and Marks and Spencer have supported a growing number of designers emerging from the local fashion ecosystem (Oxford Economics, 2010). Moreover, some of these retailers together with fashion-related institutions and higher education providers contribute to the promotion of local showcase events (e.g., London Fashion Week, Pure London) as well as of specific talent pathway schemes (e.g., the NEWGEN project supported by Topshop) dedicated to emerging fashion designers.

3.6.2. Branding the designer fashion industry: Fashion press and showcase events

In addition to fashion retailing, a local promotional apparatus has strongly contributed to defining London as a fashion centre internationally renowned for high levels of creativity and innovative talent. Over time, it has supported the local designer fashion industry by increasing its symbolic value and acknowledgment all over the world. Breward et al. (2004, p. 164) contend that 'the London fashion press is read worldwide; there is more fashion editorial in British newspapers than most'. Nowadays, many influential fashion magazines, in addition to a rising mass of independent fashion publications, are based in London. This kind of media supports the dissemination of symbols and images linking London to innovative trends and original fashion designs that are primarily showcased at the main local fashion events (Oxford Economics, 2010; Virani and Banks, 2014). Another Magazine', 'The Gentlewoman',

'System Magazine', 'Buffalo Zine' and 'Fashion London' and are just some of the numerous independent fashion publications that are based in London.

'Media plays a huge role in promoting fashion in London. There have come and gone many influential publications, some of the biggest magazines are from here or have a UK issue published. But I am also talking about the rising masses of independent fashion publications, which show to what extent dress is part of the London cultural lifestyle' (Personal interview with Editor in Chief of Fashion Magazine 1).

'The critics who work for the papers, for the broadcast industry, for online platforms and for social networks play an important part in building a promotional and critical discourse around fashion creations' (Personal Interview with Head of Educational Institution 4).

London has a number of showcase fashion events aimed at attracting a rich network of media attention. In particular, the London Fashion Week acts as a powerful image-creator for the local designer fashion industry and has been regarded as one of the most important events in the world capable of discovering the most innovative and original raw creative talent. It is the most important showcase event for fashion designers in the UK and takes place in February and September showcasing over 250 designers (BFC, 2017). Compared to the other fashion's world cities, this event is the one that shows the highest levels of creativity and experimentation in fashion design. It attracts high levels of investments and media coverage, including influential opinion formers and retailers coming from all over the world to attend the show. As an example, Figure 3.5 shows the amount of social media 'buzz' generated by the London Fashion Week in 2014, which accounted for 600,000 mentions notably through the social networks Instagram and Twitter. According to FashionUnited's Business Intelligence (2016), this event generates around £270 million[49] of income each season. It strongly contributes to supporting not only emerging fashion designers, but also the image of London as a highly creative fashion centre that is primarily acknowledged for cutting-edge designers (Skillset, 2010; BFC, 2012; 2015). In recent years, London menswear shows, which take place in January and June, have also become part of the international fashion calendar and are aimed at celebrating the creative and economic importance of the British menswear

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[49] The calculation takes into account the average income that each visitor of the London Fashion Week brings to London (e.g., hotel, food, sales taxes).

industry. Overall, these showcase events have made London one of the best cities in the world for introducing new emerging designers, building the image of new brands, and distributing new ideas and trends in the global fashion industry (Karra, 2008; Gornostaeva and Rieple, 2014).

'*We just want to see exciting, new, interesting things, we do not care if they are wearable or not wearable, commercial or not commercial, too expensive. So there is that idea that fashion is always about rediscovering the new. I don't think other places do that and that's why London is diverse. It's always about the latest designer. It was interesting, when I was at college, magazines were constantly saying "Who's the new Alexander McQueen?" and every single designer was the new McQueen or the new Galliano (...). So it was always about being new, which I don't think the other capitals are about at all*'* (Personal interview with Head of Fashion of Educational Institution 4).

Figure 3.5. Social media 'buzz' generated by London Fashion Week, 2014
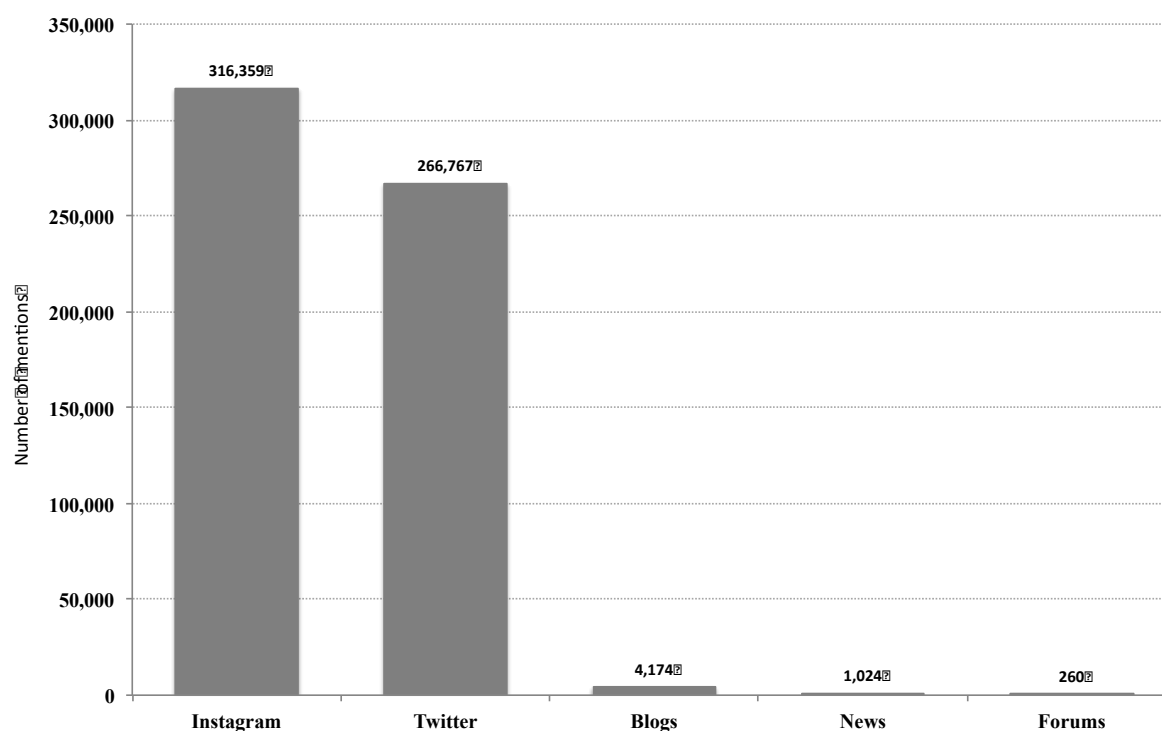
Sources: Author's elaboration using data from Statista (2014).

3.6.3. Exhibiting fashion in museum institutions

Over time, London's museums and other cultural institutions have demonstrated a high interest in fashion, functioning as a powerful local media capable of communicating place-based images and symbols linking London with the culture of fashion, notably through permanent and temporary fashion-related exhibitions, as well as showcase events. In particular, the Victoria and Albert museum (V&A) and the Museum of London have displayed fashion within their permanent galleries since their establishment in 1852 and 1911. Furthermore, in recent years, together with the Fashion and Textile Museum, Judith Clark Costume Gallery, Saatchi gallery, Somerset house, Barbican, Design Museum and many other institutions, they have presented very though provoking and innovative temporary fashion-related exhibitions, promoting local fashion and designers, as well as stimulating fashion tourism in the city (Budnarowska and Marciniak, 2016).

> *'What is so exciting about working in fashion and museums and art galleries in London is how many institutions here are telling fashion stories'* (Personal Interview with representative of fashion museum 2).

The V&A hosts the largest permanent collection of cultural repositories related to textiles and fashion in the world (around 100,000 objects), with a special emphasis on British and European fashion. In addition, starting from the 1971 when the first temporary exhibition was organized (i.e., 'Fashion: An anthology'), a huge number of fashion-related exhibitions[50] have attracted an increasing number of visitors. Among these, the 'Alexander McQueen: Savage Beauty Exhibition'[51] hosted in the museum in 2015 has been regarded as the museum's most visited exhibition throughout the entire museum's history. It was a retrospective of the designer's work that attracted 493,043 visitors from the UK and overseas in only five months (V&A, 2015).

The fashion collection[52] of the Museum of London is more focused on clothes and textiles

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[50] In the period from 2012 to 2016, the museum hosted the following temporary fashion-related exhibitions: 'Britain Creates 2012: Fashion + Art Collusion'; 'Club to Catwalk: London Fashion in the 1980s'; 'Wedding Dresses 1775–2014'; 'The Glamour of Italian Fashion 1945 – 2014'; 'Alexander McQueen: Savage Beauty; Undressed: A Brief History of Underwear'.

[51] The exhibition was borrowed from the Metropolitan Museum of Art in New York, where it became one of the museum's top 10 most visited exhibitions. The V&A enlarged and curated some sections of the original.

[52] The collection not only includes couture and custom-made tailoring, as well as designer and high street ready-to-wear, but also homemade and customised garments, every day and casual clothing, costumes associated with

made, sold and worn in the city from the 16th century to these days, with the aim of representing London's position as a centre for the production, design and consumption of fashion. In the past, it also hosted some significant temporary fashion exhibition, [53] which involved the creations of London-based designers. Moreover, the Fashion and Textile Museum, which opened in 2003, is also a cutting-edge place for fashion in London that showcases a program of temporary exhibitions exploring a rich variety of contemporary fashion and textiles items.

The interview process stressed how these permanent collections and temporary exhibitions also function as significant sources of inspiration for creative people in fashion, who look at historic and contemporary construction of garments for their fashion creations. On the other hand, designers' collections are often showed at these exhibitions through a mutual relationship, which both sustains the image of museums and designers, and promotes the identity of London as a dynamic fashion centre. In addition, London museums act also as places where new designers' fashion collections are exhibited. For instance, 'Fashion in Motion' is an event that showcases the latest collections of leading fashion designers through live catwalks shows at the V&A and, over the years, has been an important platform for promoting London creative talent.

'The proximity to the museums and exhibitions in London plays important roles. The proximity to the whole global urban culture has a very nurturing influence. Fashion, music, the visual imageries produced by photography, film, architecture, performance and theatre nourishes the imagination and stimulates conceptual and critical thinking' (Personal interview with Head of Educational Institution 4).

'Designers look at historic fashion or at contemporary print or other things in the permanent collection. They make appointments and use it like a library and they look at cut and construction of historic garments or contemporary garments. They look at print and they incorporate that into their work. Designers are going to these exhibitions and seeing what's on display and taking inspiration and weaving them literally, those ideas

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the performing arts and entertainment and textiles manufactured in London. More generally, it is aimed at illustrating the sartorial experience of Londoners of all backgrounds.

[53] The Museum of London organised the following temporary fashion-related exhibitions: 'The London Look: From street to catwalk' (2004), *London in the 1920s* (2003), *Stolen Skins? Fur in Fashion* and *Vivienne Westwood: the collection of Romilly McAlpine* (2000), and *Sole City* (1998).

back into their own collection sometimes' (Personal interview with Fashion Curator of Museum 1).

To summarize this section, image-making activities like fashion retail, fashion journalism, fashion event organization and fashion curation have a major role in creating and communicating symbols and images that define London as a highly creative fashion centre. London offers a huge range of shopping opportunities such as high street retailers, department stores, luxury fashion brands and independent shops of cutting-edge designers, as well as a large variety of fashion showcase events and exhibitions, which are also held within cultural institutions and museums. A strong promotional media system contributes to the process of communication of a symbolic narrative that keeps London anchored to an innovative, extravagant, and creative approach to fashion.

3.7. An analysis of London's fashion ecosystem by dimension

Drawing upon the qualitative and quantitative analysis presented above, this concluding section summarizes the nature, character, and main features of the 'dimensions' of London's fashion ecosystem. To clarify the resulting framework, the principal characteristics of the 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system' of this specific fashion ecosystem are summarised below (Table 3.12).

Table 3.12. London's fashion ecosystem by dimension

FASHION CITY / DIMENSIONS	LONDON
ECONOMIC STRUCTURE	• Retail and distribution are major contributors to the local economy; • The ecosystem is dominated by large retailers rather than by fashion houses, and the designer fashion sector is relatively narrow; • Lack of a deeply rooted culture of businesses and fertile soil for nurturing the growth of designer fashion firms; • Lack of solid fashion manufacturing base and complicated relationship between local small-sized designer fashion businesses and manufacturers; • High costs, lack of specialization techniques and of a skilled workforce in the manufacturing sector; • Small number of micro manufacturing firms, which primarily produce wearing apparel items.
HUMAN CAPITAL	• Human capital strongly focused on image-producing activities, notably fashion retail, fashion journalism, fashion event organization, and museum curation; • Fashion designers are more interested in a 'fashion to be seen' than in a 'fashion to be worn'; • They are more risk-taking and tend to break the boundaries producing collections that are 'out of the box'; • They value more high levels of originality, creativity and experimentation than the logics of production and the marketability of products; • They aspire to open their own companies and develop their personal collections rather than working as employees in established fashion houses.
EDUCATION SYSTEM	• Leading fashion design colleges have a global reputation for producing the most innovative and creative talent in the world; • Specialist HEIs have a strong value for students who wish to build their symbolic and social capital and achieve visibility and recognition among the local industry; • Fashion design courses are generally taught within colleges of arts or multidisciplinary universities, which regard fashion more as a form of art than of economic production; • The fashion education system is primarily centred on the figure of the fashion designer and oriented towards individual creativity, aesthetic values and conceptual innovation; • Managerial, commercial, and technical aspects of the industry are marginalized.
INSTITUTIONAL INFRASTRUCTURE	• Institutional actors work together with HEIs and local government to sustain the local designer fashion industry; • They support fashion designers in building up relationships, getting funding, and providing them with mentoring, resources, and knowledge; • They contribute to the launch and success of young and emerging fashion designers, through the support and organization of showcase events and talent identification schemes; • The activity of assistance and support from institutions is still primarily provided on the design side (e.g., fashion designers, London fashion week), rather than on manufacturing aspects of the industry; • Notwithstanding increasing support in the productive sector, fashion is treated more as a creative industry than as a manufacturing industry and a significant source of employment.

RETAIL ENVIRONMENT	• A powerful fashion retail sector includes prestigious fashion districts, department stores, high street shopping opportunities and new hubs for independent retailers; • It strongly contributes to adding economic and symbolic value to the local fashion economy; • International and local designer fashion houses aspire to open their flagship stores in London; • Small independent retailers and designers' shops usually located in East London contribute to defining significant place-based symbols; • Tourists come to London to see exciting and innovative fashion production and buy the newest style from emerging local designers; • There are positive and reciprocal collaborations between local retailers and fashion designers.
PROMOTIONAL MEDIA SYSTEM	• A strong promotional apparatus contributes to communicating significant narratives in support of the local designer fashion industry and of the image of London as a creative fashion centre; • Many influential fashion magazines and independent fashion publications continuously disseminate original fashion designs, which are showcased at the main local showcase events; • London Fashion Week acts as a powerful image-creator for the local designer fashion industry, functioning as one of the most important events capable of discovering the most creative talent; • Museum and other cultural institutions act as a powerful local media capable of distributing information about local fashion, through their permanent and temporary fashion-related exhibitions together with showcase events.

Sources: Author's elaboration.

ECONOMIC STRUCTURE

A preliminary analysis of the broad local fashion industry (i.e., designer fashion, manufacturing, retail, distribution, advertising) showed that retail and distribution represent the major contributors to the local economy in terms of employment and GVA, whereas designer fashion and manufacturing are relatively small sectors. The local fashion ecosystem is dominated by large retailers rather than by fashion houses and lacks a deeply rooted culture of businesses, as well as a fertile soil for nurturing the growth of designer fashion firms. Moreover, the interview process, together with a more quantitative analysis of the industry, highlighted the lack of a solid manufacturing base capable of supporting typically small-sized designer fashion businesses. In particular, the relationship between local designer fashion firms and manufacturers in London has long been a serious concern, being based on contrasting expectations and lack of the necessary level of trust, reciprocity, and knowledge exchange. Many respondents highlighted the high cost, as well as the lack of specialization techniques and of a skilled workforce in the manufacturing sector. Starting from the 1970s, fashion manufacturing in London has undergone significant structural changes through a

profound process of transformation, which has involved a severe collapse and contraction of the traditional manufacturing base and a partial upgrading of the remaining firms towards more design-oriented, smaller-scale and higher-quality forms of production. The quantitative analysis demonstrated how, nowadays, the local manufacturing base is mostly dominated by a relatively small number of micro-firms, which primarily produce wearing apparel items. A number of designers and retailers have recently begun to move parts of their production back to London and new manufacturing firms, mainly specialised in sampling and bespoke production, have emerged. Moreover, recently, new initiatives have been launched in support of a revitalization of London's fashion manufacturing. However, there is a general perception that a large-scale manufacturing will never be part again of the local fashion ecosystem.

HUMAN CAPITAL

London has been widely regarded as a city dominated by a unique, diversified, and rich cultural and creative sector, which functions as a powerful engine for attracting a large amount of creative talent, diverse creative businesses, and cultural intermediaries from all over the world. This highly creative environment, together with specific historical trends and cultural movements, has strongly contributed to shaping the current local fashion economy, as well as the behaviour of its human capital. Nowadays, London has a conceptual and creative approach to fashion, which is regarded more as a form of artistic expression than a form of economic production. As a result, the creative class of fashion designers is more interested in a 'fashion to be seen' than in a 'fashion to be worn'. Local designers tend to be risk-taking and to break the boundaries producing collections that are 'out of the box'. In this regard, they value more high levels of originality, creativity, and experimentation than the logics of production and the marketability of products. Moreover, they usually aspire to become independent fashion designers with their own enterprise and personal collection, rather than employees in established companies. Looking more widely, human capital is also strongly focused on image-producing activities, particularly fashion retail, fashion journalism, fashion event organization, and museum curation.

EDUCATION SYSTEM

The interview process referenced this dimension as the real engine of the local fashion economy, contributing to defining the image of London as an extremely creative and dynamic

fashion city. In particular, leading fashion design colleges have a global reputation for being the best in the world, due to their capability of attracting and producing the most innovative and creative talent. Specialist HEIs hold strong legitimising power and symbolic value, and their students are in part motivated by the opportunity to be associated with the prestigious image of these institutions and of its alumni who have become renowned fashion designers. Moreover, local HE providers function as significant means of achieving visibility and recognition among the local industry and consumers, for example through the organization of graduate fashion shows. Fashion design courses in London are usually taught within prestigious colleges of arts or multidisciplinary universities, and fashion is generally perceived more as a form of art than of economic production. The local fashion education system is primarily centred on the figure of the independent fashion designer, and is mostly oriented towards forms of teaching that emphasize individual creativity, experimentation, originality, aesthetic values and conceptual innovation, together with high levels of freedom and absence of aesthetic rules. On the other hand, managerial, commercial, and more technical aspects of the industry are generally marginal to the local education system, although these may be important for designers to learn how to establish a sustainable business and to compete into the global market.

INSTITUTIONAL INFRASTRUCTURE

London's fashion ecosystem is highly institutionalised. A number of private and public institutional actors work together with specialist HEIs and local government to sustain the local designer fashion industry, notably the growth and development of new designer fashion businesses. They support fashion designers in building up relationships, getting funding, and providing them with mentoring, resources, and knowledge. Moreover, they contribute to the launch and success of young and emerging fashion talent through financial support and the organization of the most significant local showcase events, as well as talent identification schemes. In recent years, increasing attention has been drawn to the revitalization of the local fashion-manufacturing base, particularly to the relationship between manufacturers and designers. However, the activity of assistance and support from institutions is still primarily provided on the design side (e.g., fashion designers, London fashion week), rather than on manufacturing aspects of the industry. There is a general perception that fashion is treated more as a creative industry, than as a manufacturing industry and a significant source of employment.

RETAIL ENVIRONMENT

London has a very strong retailing history and is regarded as one of the major destinations for tourists from around the world. The fashion retail sector includes some of the most prestigious fashion districts in the world with high-end boutiques, internationally known department stores, a huge variety of high street shopping opportunities and new significant hubs for cutting-edge independent emerging designers. This sector strongly contributes to generating economic and symbolic value in the local ecosystem. In particular, a large number of international and local designer fashion houses aspire to open their flagship stores in London in order to benefit from its positive symbolic association with fashion. Many independent retailers and designers' shops selling original, innovative and quality fashion design, contribute to defining powerful place-based cultural symbols and images. Interviewees highlighted how tourists come to London to see exciting and innovative fashion production and to go shopping in an extremely varied retail environment. Moreover, one of the key features of London's fashion system concerns the collaboration between local retailers and fashion designers. On the one hand, retailers discover and support emerging designers providing them with spaces to show their fashion collections. On the other hand, fashion designers 'discovered' by retailers have the opportunity to build their symbolic capital and achieve acknowledgment in the international fashion scene.

PROMOTIONAL MEDIA SYSTEM

A strong promotional apparatus contributes to communicating significant narratives in support of the local designer fashion industry and of the image of London as a highly creative fashion centre, which is primarily acknowledged for innovative and cutting-edge designers. Many influential fashion magazines, together with a rising mass of independent fashion publications, are based in London and continuously disseminate original trends and fashion designs that are usually showcased at the main local showcase events. Among these, the London Fashion Week acts as a powerful image-creator for the local designer fashion industry and has been regarded as one of the most important events in the world capable of discovering the most original and creative raw fashion talent. It attracts high levels of investments and media coverage, including influential opinion formers and retailers coming from all over the world to attend the show. Moreover, over time, London museum and other cultural institutions have demonstrated a high interest in local fashion, functioning as a

powerful local media. In particular they play a significant role in communicating place-based images through permanent and temporary fashion-related exhibitions, as well as showcase events that also support fashion tourism in the city.

3.8. Conclusions

The aim of the chapter was to investigate how a 'real' fashion city may be positioned in the 'ideal-types' framework. To do this, the chapter drew upon a broad qualitative and quantitative analysis of the fashion city of London from a perspective that emphasizes all the elements behind its formation, transformation, and current nature. The analysis was carried out from a 'supply-side' perspective through an in-depth study of the following ideal types' dimensions: 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'. This analysis led to draw a comprehensive picture of London's fashion ecosystem and to highlight the ideal type towards which London tends. It also proposes a first methodology that can be used to position fashion centres in the 'ideal-types' framework.

The analysis showed how London, unlike other fashion's world cities, is not associated with a specific business model, industrial system or manufacturing base, but with high levels of creativity and forms of urban symbolism that over time have affected its local fashion ecosystem. The study revealed that retail and distribution dominate the broad fashion industry, which is mostly characterized by large retailers rather than by fashion houses. Moreover, it lacks a deeply rooted culture of business and a fertile soil for nurturing the growth of typically small-sized designer fashion firms. In this regard, the designer fashion sector is relatively narrow and not adequately supported by a weak, expensive, and non-specialised fashion-manufacturing base that is mostly made up of micro-firms. London has a highly conceptual and creative approach to fashion, which is regarded more as a form of artistic expression than of economic production. Local fashion designers, who usually aspire to open their own businesses, value more originality, creativity, and experimentation than the marketability of products.

London's fashion education system appears as the real engine of the local fashion economy. It contributes to producing the most creative talent in the world, defining the image of London as an extremely creative and dynamic fashion city, and building the reputation of students through its high symbolic value and significant showcase opportunities. Local HEIs are

primarily centred on the figure of the independent fashion designer and oriented towards forms of teaching that emphasize individual creativity and originality rather than managerial, commercial and technical aspects of the industry. The institutional infrastructure tends to treat fashion more as a CCI than as a manufacturing industry and local support is still mainly provided on the design side, sustaining emerging designers in the development of their businesses and the showcase of fashion collections. The fashion retail sector contributes to generating economic and symbolic value in the local ecosystem through a large variety of shopping opportunities that range from high street retailers to independent fashion designers selling cutting-edge fashion styles in East London. A strong promotional apparatus, which includes local fashion press, showcase events, and fashion exhibitions in museums, communicate symbolic narratives in support of the local designer fashion industry and of the image of London as a highly creative, innovative, and cutting-edge fashion centre.

London can be described more as a place where having access to unique creative learning experience, a huge variety of shopping opportunities, renowned showcase events, and fashion exhibitions than a place where 'producing garments' and 'doing business'. These dimensions are powerful means of generating and disseminating images and narratives linking London to a culture of an innovative, original, and creative fashion design. Forms of urban symbolism significantly outweigh the traditional physical production of fashion and the importance of a designer fashion industry. Thus, in an attempt to position London in the ideal types model, it is possible to conclude that this specific fashion centre may tend towards the ideal type of the 'symbolic fashion city', which has been defined as a model of fashion centre mainly focusing on image-producing activities, where the production of apparel and even the design of clothing for production are absent or very limited.

The education system, fashion retail, fashion journalism, fashion event organization, and museum curation dominate London's fashion ecosystem, whereas the local manufacturing base and the designer fashion industry are less significant. These main dimensions continuously intertwine to support the image of London as one of the most creative fashion cities in the world. The identification of a fashion centre that is strongly anchored to forms of symbolic production further contributes to stimulating reflection on the actual importance of construction of city images, symbols and narratives for the promotion of both traditional and newer fashion cities. In particular, in the analysis, forms of symbolism are associated with an historical urban culture that is linked to a highly creative approach to fashion. The education system, fashion retail, fashion journalism, fashion event organization, and museum curation

reinforce an image of London that has strong historical roots.

This chapter has drawn upon a qualitative and quantitative analysis of the ideal types' dimensions as methodology to position a fashion centre in the 'ideal-types' framework. The dimensions have been analysed through the execution of semi-structured interviews with key actors of London's fashion ecosystem and the collection of quantitative data on the fashion industry from local government, institutions, and research centres. The descriptive analysis has been carried out from a 'supply-side' perspective and describes the main elements that have led to the formation, evolution, and actual nature of this fashion city. However, the high significance of forms of urban symbolism resulting from the analysis raises the important question of how people perceive this fashion centre. As already discussed, a huge variety of methodologies can be applied for the purpose of positioning cities in the ideal types model. The next chapter presents another study of London but from a 'demand-side' perspective, which analyses people's perception of this fashion centre through the social network platform Twitter. The aim is to complement the analysis presented in this chapter and to propose another methodology to position a fashion centre in the 'ideal-types' framework.

Chapter 4

Fashion and urban symbolism: Using Twitter data to analyse the discourse of London as a fashion city

ABSTRACT

The high significance of forms of urban symbolism in London has raised the important question of what people's perception of this fashion centre is, and what the principal symbolic associations between London and fashion that lie in individual minds are. This chapter presents a study from a 'demand-side' perspective, which analyses the discourse of London as a fashion centre on the social media platform Twitter. The aim is to complement the descriptive analysis presented in the previous chapter and to propose another methodology to position a fashion centre in the 'ideal-types' framework. The social network platform Twitter is used to identify latent structures of mental and social representations of the relation between London and fashion. To execute the analysis, a sample of 30,362 tweets including both the words 'London' and 'fashion' was collected over a period of three weeks in June 2017. Tweets were then cleaned and analysed through different selected techniques concerning statistical associations among words and aimed at exploring meanings embedded in textual data: 'Multidimensional Scaling Analysis', 'Semantic Network Analysis', 'Thematic Analysis of Elementary Contexts', and 'Word Associations Analysis'. Results are consistent with findings from the previous descriptive study. However, local fashion events, particularly the London Fashion Week, seem to function as central junctions for meaning circulation on Twitter and for the creation of specific narratives about fashion centres. The chapter is also intended as an attempt to measure forms of symbolism that are connected to fashion in contemporary urban environments. In this regard, the Twitter methodology is also adopted in a first explorative study that compares fashion's world cities, contributing to shedding light on the symbolic representation of fashion centres.

Keywords: fashion city, London, Twitter, text mining, perception, symbolism.

4.1. Introduction

The previous chapter has described London as a creativity-oriented fashion city that tends towards the ideal type of the 'symbolic fashion city'. Fashion education, fashion retail, fashion journalism, fashion event organization, and museum curation have emerged as key elements of this urban fashion formation, which contribute to the generation and communication of symbols and images that perpetuate the status of London as one of the most creative and innovative fashion cities in the world. The chapter drew upon a descriptive study of this fashion city from a 'supply-side' perspective, which has highlighted the main elements that have led to its formation, evolution, and actual nature. The ideal types' dimensions of London's fashion ecosystem were analysed through the execution of semi-structured interviews with key actors of the local system and statistics on the fashion industry. However, the high significance of forms of urban symbolism in London has raised the important question of what people's perception of this fashion centre is, and what the principal symbolic associations between London and fashion that lie in individual minds are.

Recently, the developing of a 'symbolic economy' for fashion and the construction of fashion-related symbols, images, and narratives linking cities to fashion, have become growingly significant. In order to capture which elements really contribute to symbolically supporting the status of a fashion city, it is necessary to explore individual structures of mental and social representation of the relation between fashion and urban centres. Some characteristic elements of cities act as powerful generators of symbols, images and narratives, which are then communicated through the support of various forms of media. A continuous process of creation, re-creation and transmission of these symbols transforms these images into strong place-based mental associations. As a result, the name of cities immediately evokes specific urban characteristics that are symbolically attributed to particular places in people's minds (Vanolo, 2008; Sevin, 2013). Thus, an analysis of people's perception of urban centres may help to shed light on these place-based mental associations and on the main symbols, images, and narratives that are associated with cities.

This chapter presents an analysis of the fashion city of London from a 'demand-side' perspective, which explores the discourse of this fashion centre on the social media platform Twitter. The aim is to complement the descriptive analysis presented in the previous chapter and to propose another methodology to position a fashion centre in the 'ideal-types' framework. The social media platform Twitter is used to identify latent structures of mental

and social representations of the relation between London and fashion. At the end of chapter, the same methodology is also adopted in a first explorative study aimed at analysing possible similarities and differences in the discourse of fashion's world cities on social media. According to Andéhn et al. (2014, p. 2) 'social media have become important platforms through which place brands can be communicated, negotiated, projected and assessed with few spatial or temporal constraints'. Nowadays, city images are also the result of the way consumers or users project them into the large variety of social media platforms. In this respect, Twitter can be regarded as a platform where symbols, images, and narratives about places are continuously generated and communicated through people's messages (i.e., tweets), which lead to the creation of mental place-based associations. Thus, this platform is an important novel communication tool and may be included in the dimension of 'promotional media system'. The understanding of people's perception enables the identification of the main forms of urban symbolism linked to fashion that contribute to perpetuating the status of London as a fashion city.

The chapter is intended as another exploratory exercise to position London in the ideal types model. As discussed earlier, the heterogeneity and complexity of the fashion city idea is fully reflected in the huge variety of methodologies that can be adopted to analyse fashion centres. In fact, this concept lies not only in material and tangible elements like the presence of an industry or traditional garments, but also in mental representations associated with place-based symbols that act as important identity-creators for fashion cities. Thus, the aim is to draw a picture of the discourse of London as a fashion city in order to compare it with the findings from the previous analysis carried out from a 'supply-side' perspective. To this, the ideal types' dimensions are now analysed according to people's perception of London as a fashion city. The chapter can be also interpreted as an attempt to measure forms of symbolism that are connected to fashion in contemporary urban environments. In this regard, the final replication of the analysis in a first explorative study aimed at comparing the fashion centres of London, New York, Paris and Milan seeks to assess the validity of this methodology and contribute to highlighting the key elements that are part of the symbolic associations between fashion and the urban.

To this day, several studies have been conducted to explore cities through the analysis of people's perception. As might be expected, many of these studies are associated with the discipline of place branding. As an example, Sevin (2014) proposes a place branding measurement model, where the exploration of the connections between places, people, and

messages can be used to understand cities and to measure the success of branding campaign. However, less research has been carried out on people's perception of fashion cities. In this regard, Vanichbuncha (2012), using questionnaires as primary data collection tool, investigates consumers' perception of the project 'Bangkok: The Fashion City' in order to shed light on people's opinion towards establishing Bangkok as the new Asia's fashion hub. More recently, Lazzeretti and Capone (2016), relying upon a field survey through the administration of questionnaires, analyse consumers' and tourists' perception of Florence as a fashion city in order to explore the relation between tourism and fashion in the city. In a similar vein, Acuti et al. (2017) draw upon the social platform Instagram to monitor the construction of the city image of both London and Florence. However, to the best of our knowledge, to date, there are no studies analysing people's perception of fashion cities using the social media platform Twitter.

The main advantage of this platform is associated with the possibility of exploring a larger sample of people's opinions, although these are not fully responsive to specific research questions (as for questionnaires that are built 'ad hoc'), but results need to be extrapolated from highly general textual data. To execute the analysis, a sample of 30,362 tweets including both the words 'London' and 'fashion' was collected over a period of three weeks in June 2017. Thereafter, tweets were cleaned and analysed through different selected techniques concerning statistical associations among words. More specifically, 'Multidimensional Scaling Analysis', 'Semantic Network Analysis', 'Thematic Analysis of Elementary Contexts', and 'Word Associations Analysis' were performed. Each of these analyses differently contributes to exploring meanings embedded in textual data and to shedding light on the most important thematic areas addressed in the discussion on London and fashion. The combination of the results arising from these different techniques helps to highlight the narrative about London and fashion that lies in people's minds and that shows which 'dimensions' are endowed with stronger symbolic value. Concerning the final preliminary study on fashion's world cities, it only draws upon the Multidimensional Scaling Analysis to extrapolate meanings and main concepts embedded in tweets about these centres of fashion.

The chapter is structured as follows. The image-making process of fashion centres is described in the first section. The second section addresses the reasons why Twitter has been selected as platform for the analysis. More specifically, advantages and drawbacks associated with the use of big data and social media platforms for understanding cities are highlighted. The third section presents the research design, describing the process of data collection, the

research methodology, and the procedure for the selection of keywords from textual data. Results of the Multidimensional Scaling Analysis, Semantic Network Analysis, Thematic Analysis of Elementary Contexts, and Word Associations Analysis are showed in the fourth section. The fifth section draws a picture of the discourse of London as a fashion city using the ideal types' dimension as framework of analysis. The last section presents an explorative study that draws upon Twitter to analyse the discourse of London, New York, Paris and Milan as major fashion centres. Conclusions discuss main results, emphasizing similarities and differences between the two analyses carried out from the 'supply'- and 'demand-side' perspective, as well as examining the validity of the Twitter methodology as a means of analysing contemporary fashion centres.

4.2. A new approach to the image-generating process of 'fashion cities'

An increasing number of targeted urban branding strategies have recently sought to create successful and positive cities' images using fashion-related representations and symbols. Images, which can be defined as mental pictures in terms of ideas, beliefs and perceptions that people hold about objects (or cities) strongly affect people's attitudes toward these objects. Fashion has been acknowledged as an important tool for building repertoires of images and for creating new urban landscapes and identities to make places unique and attractive, as well as attracting visitors and consumers (Skivko, 2016). It is capable of creating representations of cities, which become part of a symbolic imaginary context of people. The image of fashion cities is primarily made up of symbols that are embedded in material elements (e.g., fashion garments, flagship stores, showrooms), immaterial factors (e.g., fashion trends), and discourses about the city primarily built through a variety of promotional activities (e.g., fashion events, trade shows, exhibitions, tourist guides). Media (e.g., direct advertising channels, fashion journalism, social media networks, television) play a fundamental role in distributing these discourses and in contributing to the creation of the image of urban centres. As an example, the image of Paris as a romantic, luxury, and chic fashion city has been constructed through a strong promotion activity enacted by the French media system.

There exists a strong reciprocal symbolic relationship between fashion and the city. Fashion benefits from the association with the city, which, in turn, is branded by its association with fashion. A continuous image-generating process contributes to the creation of individual place-based mental associations that collectively become definitive symbolic narratives about

a specific fashion city. Place-based mental images between fashion and cities are self-reinforcing over time because they are part of mutual interdependencies based on the reprocessing of old images and the addition of new ones to local repertoires of symbolic narratives (Scott, 2010). Thus, they contribute to perpetuating the status of fashion centres (Power and Hauge, 2008; Skivko, 2016). In particular, they are built through a series of image-producing activities and local cultural actors who are interested in fashion for own strategic reasons (Chilese and Russo, 2008; Vanolo, 2008; Jansson and Power, 2010).

In this respect, the designer fashion industry symbolizes cities through its own branding strategies. Fashion houses use 'city names' in their brands (e.g., DKNY-Donna Karan New York) or in their advertising campaigns (Burberry's campaign 'From London with love'). On the one hand, fashion brands benefit from the positive image of cities and enhance their reputation in global markets. In this regard, the consumption of fashion goods gives people a sense a place identity (Crewe and Goodrum, 2000). On the other hand, cities raise their desirability as fashion objects and increase their reputation as fashion centres (Rocamora, 2009; Gilbert, 2013; Skivko, 2013). As an example, the brands Gucci and Chanel are strongly associated with Florence and Paris in people's minds.

Symbolic associations may also draw upon specific fashion garments as in the case of Paris haute couture, Florentine leather goods, and Milanese ready-to-wear. These images embody not only the idea of clothing, but also values and behavioural patterns linked to cities (Skivko, 2016). In addition to the designer fashion industry, a variety of 'brand channels' disseminates messages and provides the city with significant and unforgettable symbols. Promotional events including not only trade fairs and fashion weeks but also fashion awards and museums exhibitions act as powerful branding devices for fashion cities. In a similar vein, the communicative action of spokespeople like fashion designers and celebrity stars, as well as more direct advertising channels support the branding of cities as 'fashionable'. Moreover, spectacular flagship stores, retail districts, and showrooms with a strong visual impact on the territory provide cities with additional symbolic meanings (Jansson and Power, 2010).

In an attempt to analyse the image-generating process of fashion cities using the ideal types' dimensions, it is possible to emphasize how all these dimensions play an important role in the formation of cities' images. More specifically, they contribute to creating both material (e.g., fashion garments, flagship stores, showrooms) and immaterial elements (e.g., fashion trends) of fashion cities that form symbols embedded in their images. Moreover, they contribute to constructing and communicating important narratives about fashion centres that along with

material and immaterial elements are part of the city's image as perceived by the public. As an example, 'economic structure', 'retail environment' and 'education system' tend to favour the creation of material elements, whereas 'promotional media system' facilitates the generation of immaterial elements and the communication of a discourse of fashion cities.

There emerges a virtuous image-making process of fashion cities, where these dimensions benefit from the association with cities, and cities take advantage from the symbolic connection to local fashion ecosystems. This helps perpetuate the status of fashion centres over time and draws the increasing attention of the dimensions to these fashion centres. As an example, the more cities are symbolically associated with fashion, the more fashion retailers aspire to open flagship stores, fashion houses to establish headquarters, fashion designers to exhibit their collections and students to be trained at local fashion schools in these cities. New place-based symbols linked to fashion are generated and reflected in the perception that people have of cities (Figure 4.1).

Figure 4.1. The image-generating process of fashion cities
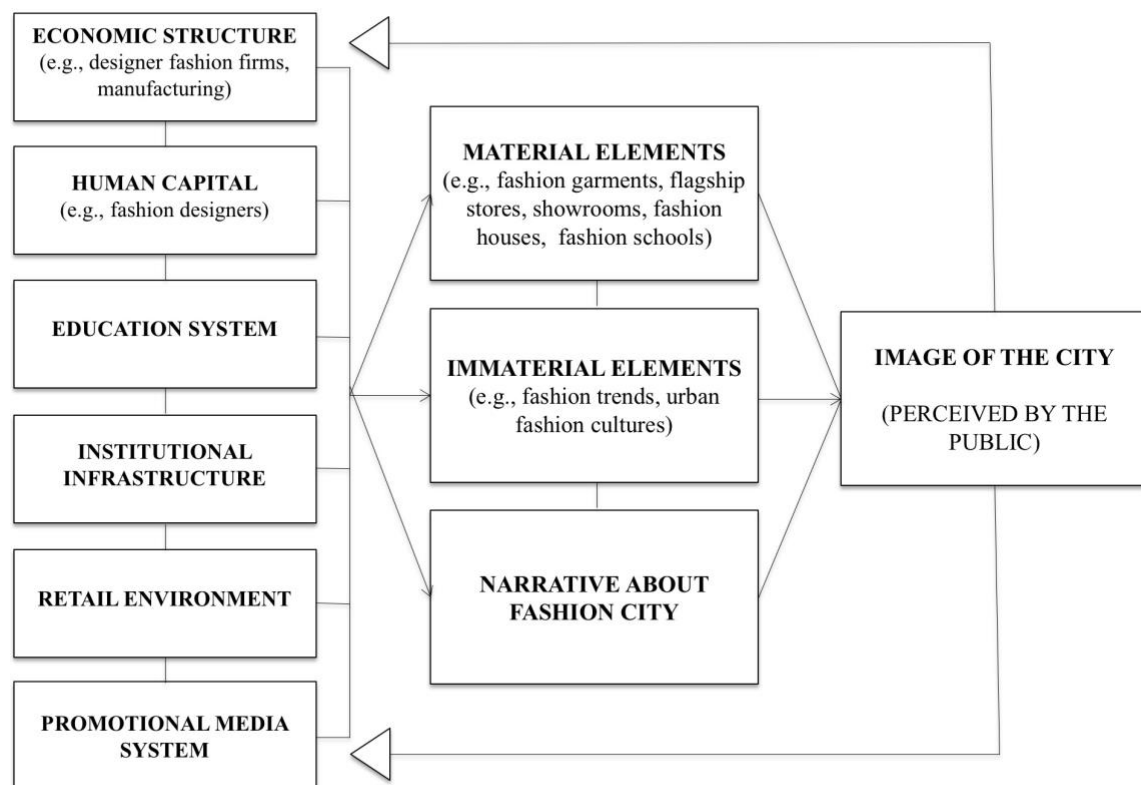
Sources: Author's elaboration.

4.3. Understanding cities through social media: Why Twitter as platform for the analysis?

In recent years, technological improvements have led to enormously increase the volume of data that can be collected, stored, and processed. More specifically, 'Big Data', which are defined as massive, dynamic and low-cost databases of digitally born data, have received growing attention as a new important source of information. Due to their size, diversity and wider geographical coverage, they have complemented traditional data collection methods such as regular Census, government records and surveys, which usually rely upon limited samples of data that are 'time and space specific, restricted in scope and scale, and relatively expensive to generate and analyse' (Kitchin, 2014, p. 3).

This new data collection method may lead to a better understanding of human behaviour, social life, socio-spatial structure, and complex dynamic systems such as cities. In particular, Big Data have provided new opportunities for urban policy development and implementation, as well as for urban and regional scientists who wish to analyse new phenomena or to address old research questions with a new insight. More specifically, these data can be used to identify urban processes and contribute to supporting future urban development (Arribas-Bel, 2014; Kitchin, 2014). Moreover, the Internet, which is further reinforced by a widespread presence of mobile devices like smartphones, contributes to storing online every aspect of life, including not only internet behaviour and economic activity, but also personal opinion, thoughts, daily life, memories, feelings and moods.

Data produced by activities on social media platforms such as Facebook, Twitter, Foursquare, TripAdvisor, and Instagram are mentioned as typical examples[54] of Big Data (Pfeffer et al., 2015). Social media platforms have gained growing attention[55] and, in many cases, have replaced traditional media sources for obtaining information in real time (Bian et al, 2016). The purposes of social media are multiple and include various functions such as information dissemination, personal activities posting, picture sharing, professional profiling, advertisements and political opinions. In particular, their exponential growth has given rise to the possibility of using the web to explore and monitor public opinion, beliefs, narratives,

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[54] Other examples mentioned in relation to Big Data are health or government records, GPS data and sensor data, call logs of mobile phones, or other digital traces left by individuals through online behaviour, financial transactions or other digital activities (Pfeffer et al., 2015).

[55] In 2017, Instagram accounted for 800 million people using the platform, whereas Facebook had over 2 billion active users (Statista, 2017).

needs, and perception of individuals, groups and society about a vast array of themes like brands, products, events, and politics.

Moreover, social media, which are characterized by a near real-time data production, allow analysing socio-spatial and temporal dynamics and human behaviour within urban environments. Overall, they provide new data sources that expand the range of 'what can easily be measured, and thus facilitate computational knowledge discovery'. As a result, thanks also to their easy access and free availability, an increasing number of scholars has recently drawn upon social media data for developing analyses and research in various disciplinary fields like computer science, behavioural psychology, medicine, healthcare, marketing and business analytics (Arribas-Bel, 2014; Bian et al., 2016). The Internet and social media are capable of influencing people's perception of places and therefore these data have drawn the increasing attention of researchers from tourism, destination marketing and place branding disciplines. As an example, Choi et al. (2007) analysed the content of a variety of web information sources like tourism websites, tourist operators, online travel magazines and blogs to identify the image representations of Macau. De Moya and Jain (2013) drew upon data from Facebook to understand how Mexico and Brazil communicate their brand personality through this social media platform. Moreover, Kladou and Mavragani (2016) analysed reviews posted on Tripadvisor to determine visitor's interpretation of Istanbul image.

In particular, since 2006, the year of launch, Twitter has increasingly grown in popularity and it has been ranked among the most popular social networks to publicly share opinions, thoughts, feelings, activities, news and photos with 'followers'. It is a micro blogging social network with around 330 million users and 500 million messages per day (Statista, 2017). Registered users can publish an unlimited number of 'tweets', which are short messages of 140 or fewer characters about various topics. Tweets are public and can be viewed by anyone with access to the web, without the need of a Twitter account. Each user shares public tweets, which may include new original content or information selected from other users' or sources, to open debates, participate in discussions or follow others' communications (Kim et al., 2013). As for other micro blogging platforms, the short length of tweets lowers users' requirement of time and contributors may post multiple updates in a single day (Java et al., 2009). Moreover, the mechanism of 'retweeting' (i.e., sharing another user's tweet) contributes to raising the speed of information dissemination (Bruns and Stieglitz, 2012). It is important to highlight that a large proportion of its users works in the media industry (e.g., journalists, critics).

Twitter data are user-centred and easily accessible through its Application Programming Interfaces (APIs), which allows researchers to retrieve tweets by users, 'hashtags', or keywords in an automated way. Organizations have been increasingly looking at the sentiment of Tweets posted by the public about their markets, consumers, and competitors. However, Twitter has also emerged as a respected data source for academic research and is now being published in many peer-reviewed social science journals. In this regard, this platform appears to be particularly suitable for text mining and knowledge discovery. Like other micro blogging platforms, it has been used to extract information about global mood patterns, attitudes, and perceptions towards a variety of topics and to monitor public opinion during any human-affecting event such as political elections and natural or human disasters (Bruns and Stieglitz, 2012; Kim et al., 2013; Bian et al., 2016).

Most importantly, this platform has been recently regarded as suitable for exploring how places are perceived. It can be used to measure people's perception of cities in place of more traditional methods, like quantitative perception surveys, interviews, and importance satisfaction analyses. New communication platforms like Twitter contribute to attributing meanings to places through a continuous process of creation, communication and negotiation of images about definitive characteristics of places. In particular, drawing upon the Kavaratzis' (2004) framework on place image communication, Twitter belongs to both secondary and tertiary communication, which is associated with the method of sending messages to targeted people and of reinforcing these messages through word of mouth on social media that affects people's perception (Sevin, 2013). These images or messages, which are created by means of tweets, are transformed into symbolic associations between a place and definitive concepts in individual minds. However, to this day, still little research has drawn upon Twitter for the study of cities. Sevin (2013) analysed how Twitter is used by five prominent American destination marketing projects (i.e., Illinois, San Francisco, Idaho, Texas and Milwaukee) to understand the relation between social media ecology and place branding. Andéhn et al. (2014) collected data about the city of Stockholm from Twitter to analyse how social media affect place brands and how consumer-based brand equity (or value) is reflected on Twitter. In particular, results of this study highlight that Twitter is not only an interesting means of understanding place brands, but it also operates with its own logics, constituting an interesting topic for further research.

For the above reasons, Twitter has been considered as the ideal platform for assessing the public perception of London as a fashion city. As compared to other social network platforms

like Facebook or Instagram, Twitter is primarily used to express opinion, thoughts, and feelings, disseminate information, and debate about a variety of topics. It usually includes complete and meaningful sentences, which are posted by both users belonging to the media industry and the general public, thus enabling a better reconstruction of the discourse of London as a fashion city. In particular, Instagram was not considered suited to this typology of analysis due to its main focus on pictures and hashtags, which make it more difficult to extrapolate specific meanings and concepts from users' posts. Moreover, it has been verified that hashtags related to fashion (e.g. #instafashion, #blogger, #fashionaddict), because of their little significance in terms of meaning, are not valuable tools for differentiating the discourse on fashion in various cities. Before discussing the research methodology implemented, it is important to highlight that the use of Twitter as a stand-alone resource requires high levels of caution. As will be better explained in the next section, it may not be possible to generalize final findings to the general population, particularly due to a lack of clarity regarding the representativeness of the sample of tweets. Twitter users tend to be younger (e.g., 37% of users are under 30, whereas only 10% are 65 years or older, as of 2014) and do not represent the general population (Bian et al., 2016). However, the analysis performed in this chapter is mainly intended to complement the previous descriptive analysis of London (Chapter 3) and to explore another methodology to analyse the fashion city of London in the 'ideal-types' framework.

4.4. Research design

4.4.1. Data collection

Tweets were collected over a period of three weeks in June 2017 (9th – 30th) using the NCapture tool, which is a web browser extension for the NVivo 11 software package[56] (QSR International 2017). This data collection mechanism is able to 'capture' publicly available tweets and allows creating a comprehensive and chronological 'batch' of data. More specifically, this system relies on Twitter API, which is an automated approach of data

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[56] NVivo is an advanced research analysis software that supports both qualitative and mixed research methods. In particular, it allows researchers to organize and analyze unstructured or qualitative data like interviews, social media and web content. Its web extension NCapture can be used to collect material from a range of sources from the web (e.g., blogs, Twitter, Facebook, YouTube).

retrieval through the Application Programming Interface (API) provided by Twitter. Twitter API provides a small sample of Twitter data, which is limited to approximately 1% of all the tweets available. Moreover, the amount of traffic or data flow available at the point of data collection affects the number of tweets that is possible to retrieve through NCapture. As a consequence, some concerns have been raised on the representativeness of the sample (Kim et al., 2013). In this respect, Twitter developers confirm that it is a statistically relevant sample of the total volume of tweets (i.e., Firehose), although they do not share any more details beyond that. Other tools like Tweepy enable the capture of real-time or 'live' data (i.e., streaming data). However, these data are more suitable when tweets need to be monitored during a specific event or situation. In addition, they require more technical knowledge and are more resource intensive. Due to the specific aim of chapter of analysing people's perception of London as a fashion city, NCapture through Twitter search API was regarded as a more suitable tool for collecting a sufficiently good sample of tweets.

NCapture can be run directly on the search function available on Twitter (i.e., Twitter search), which can retrieve up to 7 days historical data. Data were collected from Twitter via the following search term: London (AND) fashion. This search term enabled to capture only tweets relevant to the discussion on London and fashion. The data search collected tweets only written in English, which is the most used language on Twitter (Arnaboldi et al., 2016). The corpus of analysis was also restricted to a unique language to facilitate the corpus preparation and carry out subsequent quantitative text analyses. Samples of tweets were mined twice a day (early morning and late afternoon) over the selected period of three weeks, in order to capture a continuous stream of data without gaps in the collection. The capture of tweets was repeated every day at around 9am and 7pm in order to collect the highest number of tweets in each selected day. During the process of data retrieval, the programme may capture duplicated tweets. However, duplicates were eliminated merging new datasets with previously imported datasets into NVivo 11. The total number of tweets collected during the period of tracking was 30,579 (N=30,579). The NCapture tool, which produces the nvcx file format that can be exported to a Microsoft excel spreadsheet (Microsoft, 2010) through NVivo, was used to convert the search results into a dataset.

Data were pre-processed to ensure that the search term was correctly identifying content relevant to the analysis of the relationship between London and fashion. Redundant, misleading and multiple tweets with identical content were deleted. At the end of the cleaning process, the database consisted of 30,362 tweets (N=30,362). Figure 4.2 shows the number of

tweets captured per day in the period of tracking of three weeks. It is important to mention that the data collection period included the London Fashion Week Men's (LFWM) event, which took place from 9th to 12th June 2017. During these days, the number of tweets collected was much higher than for the rest of the selected period.

Thus, it is possible to generalize that tweets concerning London and fashion increase during the fashion week event. To provide a further confirmation and extend this trend to other fashion's world cities, Figure 4.3 presents the web search interest related to the association between fashion and the fashion's world cities of London, Paris, Milan, and New York over the past 5 years (2012-2017). Data were extracted from 'Google Trends', which enables to mine the Google search engine[57] in order to observe the world popularity of various topics, keywords, and phrases (Choi and Varian, 2009). The highest web popularity for the terms 'London fashion', 'Paris fashion', 'Milan fashion' and 'New York fashion' was in September and January, when Spring-Summer and Fall-Winter fashion weeks take place in these cities. The inclusion of the LFWM in the period of data collection represents both an advantage and a limitation. On the one hand, it allowed the collection of a substantially greater number of tweets. On the other hand, some bias might be related to the high number of tweets that only focus on this event. Therefore, it is important to consider this issue when discussing the London's discourse that emerges from Tweets. Future research should consider repeating the analysis in a period with no particular events in order to compare results.

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[57] Google search engine now processes around 30 billion searches per week and allows analysing trends in word usage in terms of queries and frequency of access (Choi and Varian, 2009)

Figure 4.2. Number of captures, tweets and retweets by day of collection (9th -30th June 2017)
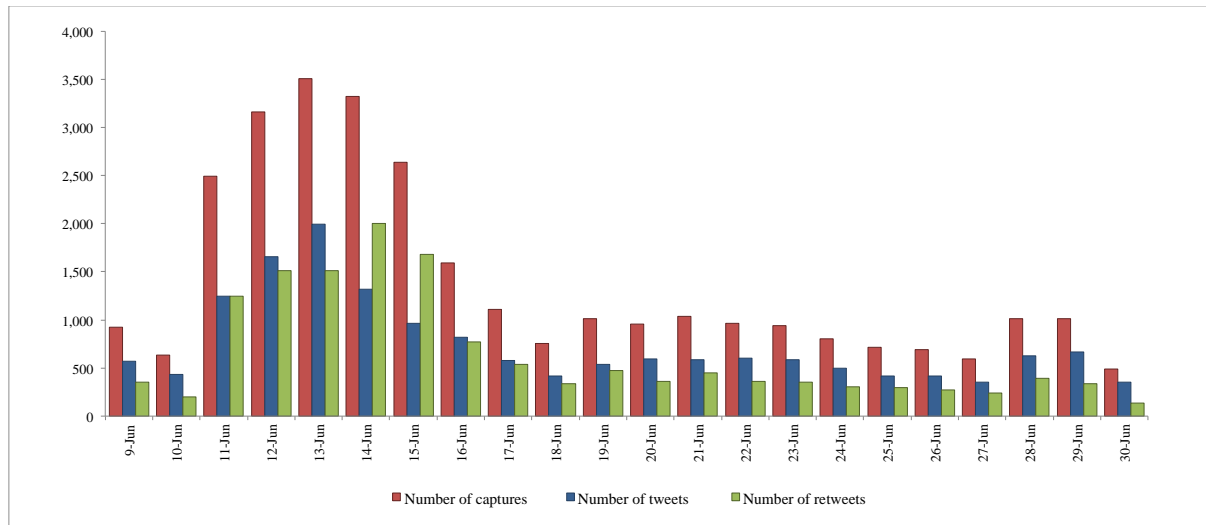
Sources: Author's elaboration using data collected through NCapture.

Figure 4.3. Google search interest on fashion's world cities by month and year (2012-2017)
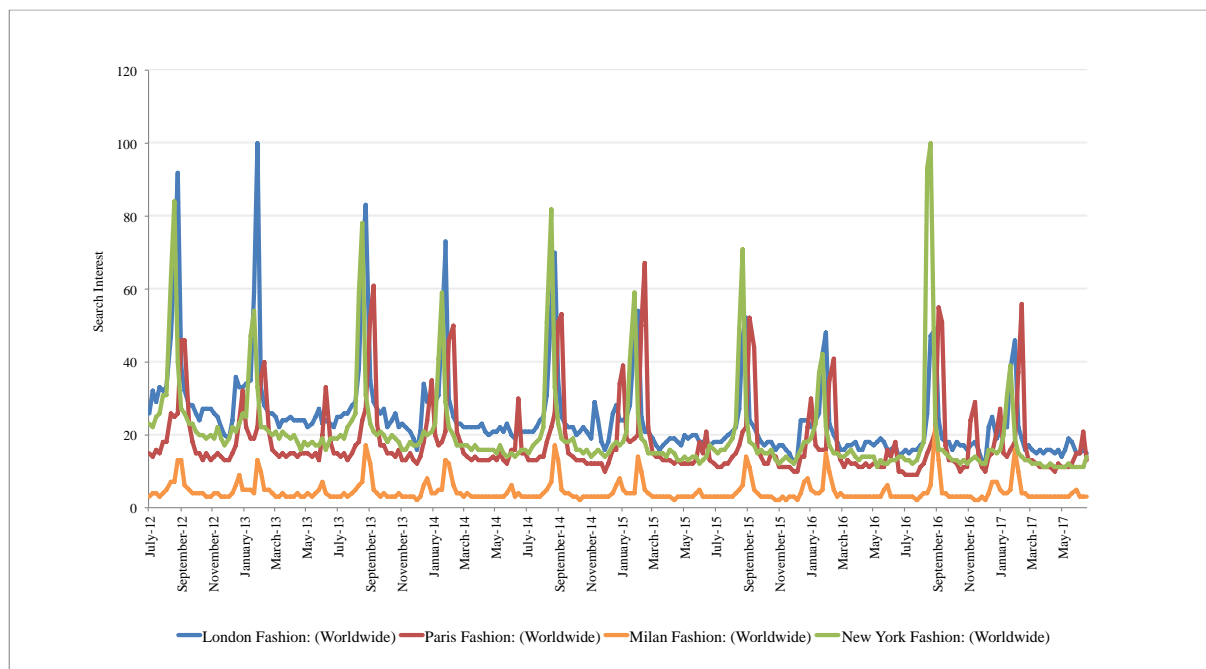
Sources: Author's elaboration using data from Google Trends.
Notes: Numbers represent search interest relative to the highest point on the chart. A value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular and a score of 0 means the term was less than 1% as popular as the peak.

218

The dataset (N=30,362) included retweets, which are messages created by one user and then shared by another user. More specifically, these messages accounted for 47% of the total tweets gathered during the selected period (see Appendix B – Table B1). Retweets were deleted from the analysis since original tweets enable to better identify discourses without possible distortion associated with repetition of content included in retweets. The final dataset, without retweets, consisted of 16,240 original tweets (N=16,240). The final sample includes the following information collected through the tracking algorithm: Row ID (e.g., NVivo identifier for each tweet), Tweet ID, Username, Tweet (e.g., text content of the tweet), Time (e.g., time and date of the tweet), Tweet Type (e.g., tweet or retweet), Retweeted by (e.g., number of time that tweet had been retweeted at the point of data collection), #Hashtag, Mentions (e.g., list of user names in the tweet), Name (e.g., account name), Location (e.g., location according to Twitter profile), Bio (e.g., copy of the bio statement from the Twitter profile), Number of Tweets, Number of Followers, Number of Following and Location Coordinates (Dann, 2015).

The remaining 16,240 tweets were posted by 5,722 users, who contributed an average of 4 tweets each. The top 10 contributors accounted for 2,357 tweets. However, the vast majority of users (4,960) published less than 4 tweets. Despite the presence of some 'power users' exhibiting a greater quantity of activity than average users, the discourse on London as a fashion city is highly varied in terms of contributions. It is important to point out that not all tweets contain information on contributors' location and geo-location data (latitude and longitude), since users can choose to not indicate this information. Furthermore, following recent changes to the Twitter app for mobile devices, users must now give consent to sharing their precise location tweet by tweet. This has led to the number of geo-located tweets being much reduced. In this regard, the final dataset contains information on location only for 12,749 tweets (79% of total sample). Among these, 3,950 were posted by users located in London.

Concerning exact geographic coordinates (longitude and latitude), 66% of tweets included this information (10,704 tweets with 961 different geographical coordinates). Figure 4.4 and 4.4 show the number of geo-located tweets of the sample, both in the world and in United Kingdom. The highest concentration of tweets is the East part of United States and in Europe, particularly in Denmark, Norway, and United Kingdom. Thus, the fashion's world city of London draws public attention on social media from all over the world. However, as might be expected, from Figure 4.5, which zooms the map into Unite Kingdom only, it is possible to

observe that the highest sample of UK tweets comes from London. However, overall, the sample contains tweets that are diversified in terms of their geographical origin and this can help further discussion on how people, not only from the UK and London but also from other geographical areas in the world, perceive this major fashion city. Future research should consider conducting the same analysis by separating tweets posted by local people and those by users from outside London to see how perception may change.

Figure 4.4. Number of geo-located original tweets in the world
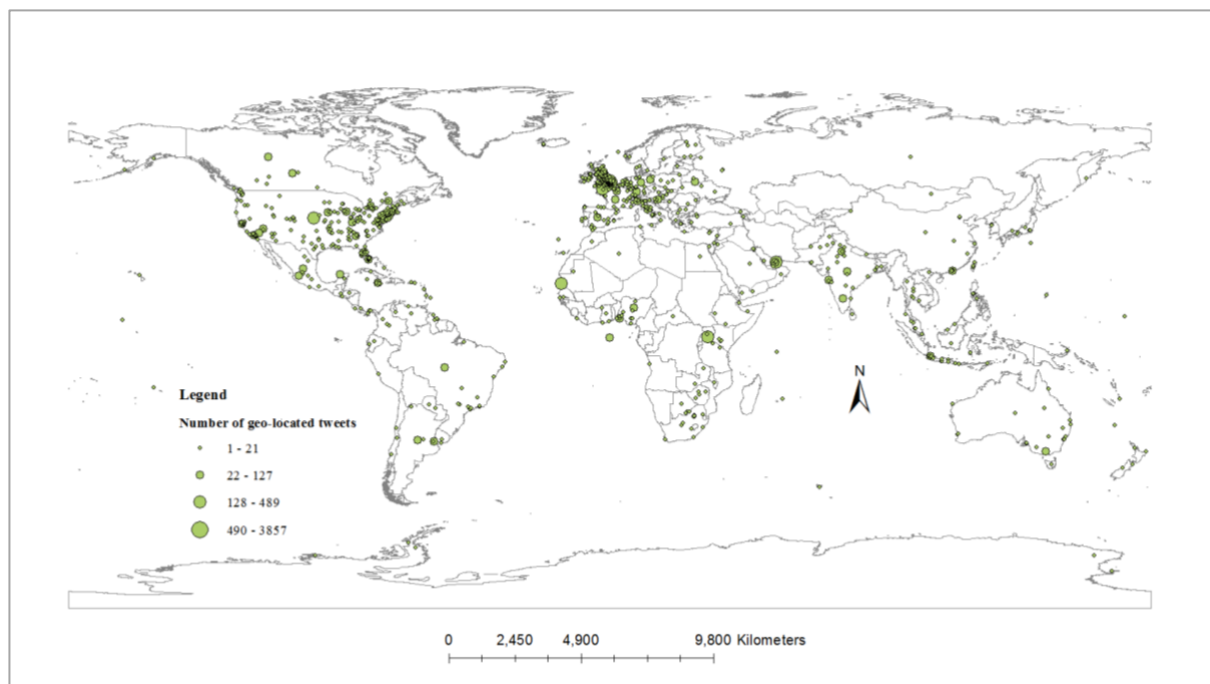
Sources: Author's elaboration using geo-located tweets and ArcGIS software.
Notes: Tweets have been graphically geo-localised using the geographical coordinates included in the database. The size of the symbol is related to the number of tweets posted from the same geographical coordinates.

Figure 4.5. Number of geo-located original tweets in United Kingdom
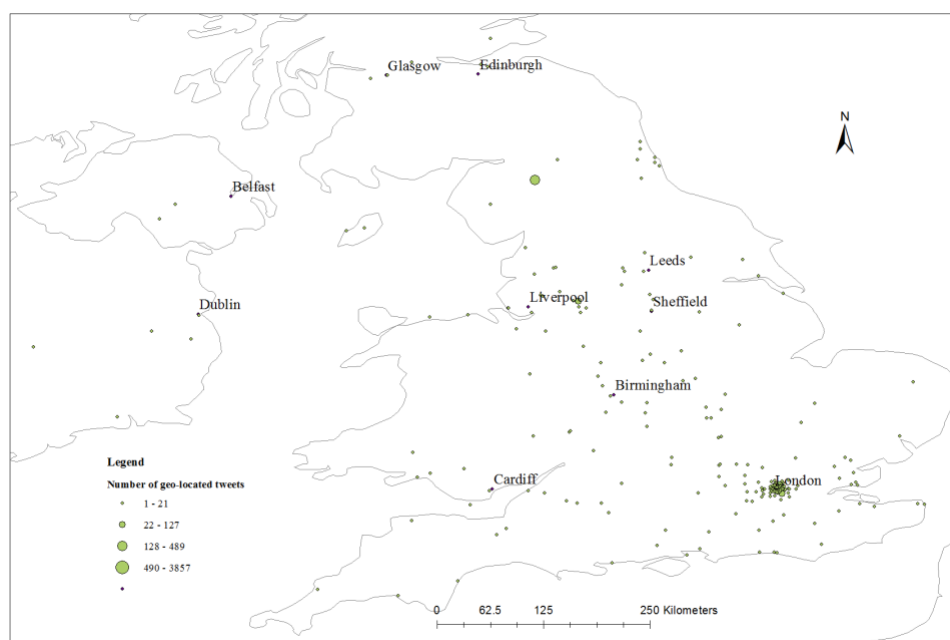
Sources: Author's elaboration using geo-located tweets and ArcGIS software.
Notes: Tweets have been graphically geo-localised using the geographical coordinates included in the database. The size of the symbol is related to the number of tweets posted from the same geographical coordinates.

4.4.2. Methodology

The qualitative and quantitative analysis of tweets was performed by means of the software T-LAB PLUS 2016, which is a content analysis, visualization and mapping software package that provides a large variety of linguistic, statistical and graphical tools for text analysis (Lancia, 2016). Obviously, the nature of textual data like tweets is qualitative in itself. However, this kind of data can be analysed not only in terms of qualitative content, but also in relation to statistical associations among words. In this regard, words become numbers and the software outputs become texts to be interpreted (Zhang et al., 2012; Cortina and Tria 2014). The analysis adopts a mixed research method and is primarily aimed at understanding the qualitative and quantitative importance of the most recurring words (i.e., keywords), which are part of the corpus of tweets. In particular, the analysis draws upon co-occurrences of words as statistical associations that reflect their semantic connections. More specifically, co-occurrences refer to the number of elementary contexts[58] (ECs) where each lexical unit

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[58] Elementary contexts or context units are related to syntagmatic units (e.g., sentences, paragraphs), in which each primary document can be divided (Lancia, 2017).

221

(i.e., words, lemmas, categories) co-occurs with another (Lancia, 2007).

Through selected techniques available in T-LAB and the help of the software Gephi the following analyses were performed: Multidimensional Scaling (MDS) Analysis, Semantic Network Analysis (SNA), Thematic Analysis of Elementary Contexts (TAEC), and Word Associations Analysis (WAA). The combination of these analyses and their results enabled the identification of latent structures of mental and social representations linked to the perception of London as a major fashion city on social media. Each of the analyses contributes to highlighting different aspects of the narrative about London and fashion that is embedded in tweets. In particular, the first two analyses allowed the identification of different categories of themes addressed in the discourse of London as a fashion city, which were needed to perform the Thematic Analysis of Elementary Contexts.

Firstly, Multidimensional Scaling Analysis was carried out to graphically represent the proximity, in terms of co-occurrences, among the most frequent keywords within a space of reduced dimensions. The objective of this analysis was to provide a first and general overview of the most significant concepts and their relations within the corpus of tweets. Secondly, Semantic Network Analysis was performed to give a further and more in-depth insight on the most important themes discussed through tweets. Moreover, it was aimed at identifying emerging clusters of words and their significant connections in order to explore meanings embedded in textual data. Unlike MDS, Semantic Network Analysis was carried out on the overall sample of keywords and was based on the probabilistic co-occurrence among lemmas.

Thirdly, in order to explore in depth the content and relationships among the main thematic areas characterizing the discourses on London and fashion, Thematic Analysis of Elementary Contexts was performed on the overall sample of words. More specifically, a 'supervised' cluster analysis was carried out according to a set of predefined categories generated deductively through a 'manual content analysis' and a sort of K-means clustering automatically executed by T-LAB. Lastly, Word Associations Analysis was carried out to analyse specific co-occurrence relationships among some selected keywords of tweets, which were regarded as particularly significant to the purpose of the study. More specifically, the aim of this analysis was to investigate more accurately some elements that were emerged from previous analyses as highly important to understand the public perception of London as a fashion city.

4.4.3. Database preparation and selection of keywords

Building a qualitative dataset to analyse tweets required several preparatory steps. Firstly, the excel spreadsheet with tweets was transformed into a corpus using the option Corpus Builder of T-LAB. Secondly, the corpus was prepared for quantitative text analysis. In this pre-processing phase, the software automatically performed corpus normalization [59], multi-word/stop-word detection, elementary context segmentation, automatic lemmatization, vocabulary building, and keywords selection. T-LAB allows users to personalize some of these activities that are performed on textual data of the corpus. In particular, a customised multi-word list, which mostly included a sequence of words subject to lexicalization [60] (e.g., fashion week, graduate fashion week, fashion design) and proper names of people, places, companies, and institutions (e.g., British Fashion Council, Vivienne Westwood, London College of Fashion, Oxford Street), was imported into the system. This list was created after a preliminary screening of the excel spreadsheet including the final sample of tweets. Moreover, the automatic selection of stop-word list (e.g., words with no significant content like articles, pronouns and exclamations) was checked to add other not significant components (e.g., https, RT) from the list generated automatically.

Another important decision in this phase was the text segmentation strategy and the selection of the elementary context to be analysed. The options available were sentences, chunks, and paragraph. Due to the short length of tweets, the unit 'sentence' was considered the best option. In fact, sentences are regarded as sequences of words interrupted by a full stop and carriage return with a length up to 1000 words, which are well suit for the short length of tweets (up to 140 words). Then, using a standard dictionary, T-LAB carried out automatic lemmatization by converting each word into a lemma, which is commonly defined as a group of words with the same lexical root belonging to the same grammatical category (e.g., 'studies', 'studying', 'studied' are converted into the lemma 'study'). The result of this process and the vocabulary of the corpus were checked by means of the 'Dictionary Building' function in order to disambiguate homographs. The final corpus vocabulary was a size of 235,515 words tokens (corpus dimension in terms of total occurrences). Occurrences are

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[59] With the corpus normalization, T-LAB carries out a series of processes like blank space in excess elimination, apostrophe marking, space addition after punctuation marks and capital letter reduction. Moreover, it marks strings that are recognized as proper nouns and transforms multi-words in unitary strings (e.g., fashion_week) (Lancia, 2017).

[60] Lexicalization is the linguistic process through which a sequence of words becomes a lexical unit (Lancia, 2017).

related to the number of ECs that contain each word in the corpus (Lancia, 2017). There were 25,272 word-types and 11,796 words occurred only once (hapax legomena). The word types included 10.7% of the occurrences and the relationship between hapax and word types was 47%. Since the type-token ratio is < 20% and the hapax percentage is < 50%, it is possible to state the consistence of a statistical approach (Bolasco, 1999).

The third step was related to the selection of keywords, which may refer to all lexical units (i.e., words, lemmas, categories) belonging to the category of content words (e.g., nouns, verbs, adjectives, and adverbs). This is the most important and time-consuming step of the analysis because of its strong influence on final results. Thus, this phase requires high levels of accuracy. In fact, keywords are used to carry out the subsequent analyses and their selection is highly decisive in finding significant and reliable results. A preliminary list of keywords was automatically selected by T-LAB according to the following procedure: 1) selection of the lexical units (words, lemmas or categories) with the occurrence values higher than the minimal threshold[61], 2) computation of the TF-IDF (Term Frequency - Inverse Document Frequency) test to all the crosses of each selected word for the text being analysed, 3) selection of the words with the TF-IDF highest values. In particular, TF-IDF is a measure proposed by Salton (1989) that allows evaluating the weight of a term (lexical unit) within a document (context unit), according to the following formula:

$$w_{ij} = tf_{ij} \times idf_i \, (Term \; Frequency \; \times \; Inverse \; Document \; Frequency)$$

$$w_{ij} = tf_{ij} \times log \frac{N}{df_i}$$

Where:

tf_{ij} = *Number of occurrences of i (term) in j (document)*

df_i = *Number of documents containing i*

N = *Total number of documents*

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[61] T-LAB sets the minimum frequency threshold to 4 to guarantee the reliability of statistical procedures.

tf_{ij}(Term frequency value) can be normalised as follows: $tf_{ij} = tf_{ij} / Maxf_{ij}$

$Maxf_{ij}$= Maximum frequency of i (term) in j (document)

Through this statistical method, T-LAB automatically selected 1000 keywords (this threshold was fixed when importing the file into the software). However, due to the high significance of keywords for subsequent analyses, the software allows users to customize this list in order to make it more suitable to the objective of the research. In this phase, the quantitative (total of occurrences) and qualitative (meaningful words for the context of analysis) importance of the various terms was checked to ensure a good quality of the final sample of keywords. Firstly, through the customized settings option, lemmas with not relevant content were excluded from the list (e.g., today, year, biannual, day, best, good, June). Secondly, several lexical units were renamed or grouped together into groups, primarily according to a synonyms and content analysis. The occurrences of these lexical units grouped together were automatically summed. Nouns, adjectives, and verbs considered as synonymous or with similar meaning were grouped together into a single 'head' lemma. Some examples include SCHOOL (school; university; college; academy), SHOWCASE (showcase; feature; display) and WONDERFUL (wonderful; amazing; fabulous; gorgeous; stunning; fantastic; superb; awesome; beautiful). In some cases, nouns, adjectives, and verbs with the same lexical root were grouped together into the related noun. Some examples include ART (art; artistic; artist), CREATIVITY (creativity; creative; create; creator; creation), and EXHIBITION (exhibition; exhibitor; exhibit).

Some lemmas group together nouns, adjectives, and verbs belonging to the same theme according to a content analysis category. Some examples include PHOTOGRAPHY (photography; photo; shooting; shoot; photographer; image; picture; flash; capture), PRESS (press; magazine; edition; editor; editorial; edit; writer; interview; version; word; article; copyright; copywriter), EVENT (event; fair; festival, celebration; anniversary; party), JOB (job; apply; salary; role; profile; vacancy; recruitment; executive; developer; merchandiser; assistant; head; senior; associate; experienced), MUSEUM (museum; gallery; pavilion; curation; curator) and CRAFTSMANSHIP (craftsmanship, bespoke, tailoring, tailor, handmade, craft, artisan). Moreover, some lemmas form categories of products like FOOTWEAR (e.g., shoes, trainers, sneakers), TEXTILE (e.g., silk, fabric, print, knitwear), and ACCESSORIES (e.g., jewellery, bags, sunglasses).

Finally, there are lemmas grouping together list of proper names of designers (LONDON FASHION DESIGNERS), companies (LONDON FASHION COMPANIES, BRITISH FASHION COMPANIES), retailers (LONDON RETAILERS), events (FASHION WEEK, LONDON FASHION EVENTS, MUSEUM EXHIBITION), museums (LONDON MUSEUMS), schools (LONDON FASHION SCHOOLS), magazines (MAGAZINES, FASHION MAGAZINES) and streets (STREETS OF LONDON). Table 4.1 displays the content of each of these specific labels in addition to the occurrence value of all the single lemmas included in each group. It is important to mention that some proper names (VIVIENNE WESTWOOD, VICTORIA AND ALBERT MUSEUM, LONDON COLLEGE OF FASHION, BRITISH FASHION COUNCIL) have been not grouped under these categories due to their qualitative and quantitative importance for the analysis. The final customized list included 180 keywords with a minimum threshold of 10 occurrences. Table 4.2 shows the first 60 keywords ranked according to their number of occurrences.

Table 4.1. Content of lemmas including proper names of people, companies, media, and institutions

LONDON FASHION DESIGNERS (1,351)	LONDON RETAILERS (174)
MATTHEW MILLER (214)	MARKS AND SPENCER (96)
JASPER GARVIDA (170)	FARFERTCH (23)
CRAIG GREEN (152)	LIBERTY LONDON (17)
ASTRID ANDERSEN (141)	TOPSHOP (13)
MATTHEW WILLIAMSON (136)	HARRODS (13)
CHARLES GEFFREY (104)	ASOS (12)
MARIA GRACHVOGEL (102)	MAGAZINES (558)
MARTINE ROSE (59)	NEW YORK TIMES (359)
CHRISTOPHER BAILEY (50)	BRITISH GQ (87)
EDWARD CRUTCHLEY (41)	THE GUARDIAN (52)
CHRISTOPHER RAEBURN (37)	WGSN (29)
PETER PILOTTO (32)	THE INDEPENDENT (24)
OLIVER SPENCER (30)	FORBES (16)
GORDON RICHARDSON (28)	FASHION MAGAZINES (407)
KATIE EARY (22)	FASHION CHANNEL (232)
JULIEN MACDONALD (21)	VOGUE (95)
IRENE AGBONTAEN (21)	WOMEN'S WEAR DAILY (62)
PATRICK GRANT (19)	LONDON FASHION CAT (18)
LONDON FASHION COMPANIES (844)	FASHION WEEK (6,625)
DAVID BECKAM (151)	LFW MEN'S (4,151)
BURBERRY LONDON (137)	LONDON FASHION WEEK (2,284)

COTTWEILER (129)		AFRICA FASHION WEEK (190)	
TOPMAN DESIGN (107)		LONDON FASHION EVENTS (37)	
VICTORIA BECKAM (96)		FASHION FEAST (27)	
JO MALONE LONDON (68)		PURE LONDON (10)	
STELLA MCCARTNEY (50)		MUSEUM EXHIBITION (142)	
HOUSE OF HOLLAND (43)		BALENCIAGA SHAPING FASHION (134)	
ALL SAINTS (25)		FASHION IN MOTION (8)	
JIMMY CHOO LONDON (24)		LONDON FASHION SCHOOLS (14)	
PHOEBE ENGLISH (14)		CENTRAL SAINTS MARTINS (9)	
BRITISH FASHION COMPANIES (126)		FASHION RETAIL ACADEMY (5)	
TAUTZ (51)		STREETS OF LONDON (130)	
PAUL SMITH (39)		ST. JAMES'S STREET (73)	
BARBOUR INTERNATIONAL (25)		SAVILE ROW (28)	
MULBERRY (6)		OXFORD STREET (18)	
ASPINAL OF LODON (5)		NEW BOND STREET (11)	

Sources: Author's elaboration using data extracted from the 'Key Words Selection' of T-LAB.

Table 4.2. First 60 keywords by number of occurrences

Keywords	Occurrences	Keywords	Occurrences
FASHION_WEEK	6625	UNITED_KINGDOM	243
LONDON_FASHION_DESIGNERS	1351	OUTLANDISH	227
LONDON_FASHION_COMPANIES	844	VIVIENNE_WESTWOOD	207
TRENDS	770	PRICE	206
APPAREL	732	INSPIRATION	205
DESIGNERS	722	WORK	196
PHOTOGRAPHY	649	YOUNG	196
STREET_STYLE	613	STUDENTS	193
EVENT	583	DESIGN	189
MAGAZINES	558	TEXTILE	186
FASHION_SHOW	547	BLOGGER	183
JOB	518	SCENE	178
PRESS	511	RETAIL	176
WONDERFUL	427	LONDON_RETAILERS	174
FASHION_MAGAZINES	407	VICTORIA_AND_ALBERT_MUSEUM	169
SHOP	403	EXCLUSIVE	166
BRAND	394	LIFESTYLE	163
FOOTWEAR	391	STORY	162
BACKSTAGE	347	LONDON_COLLEGE_OF_FASHION	161
ACCESSORIES	343	MUSEUM	161

TRENDS_FROM_LONDON	316	STREET	157
ART	311	LAUNCH	156
MENSWEAR	307	CREATIVITY	155
NEWS	300	CONNECT	151
SHOWCASE	288	NEW_YORK	148
MODEL	276	STYLISH	145
EXHIBITION	275	MUSEUM_EXHIBITION	142
CATWALK	259	BLOG	142
LUXURY	257	MUSIC	136
CELEBRITIES	243	VIDEO	134

Sources: Author's elaboration using data extracted from the 'Key Words Selection' of T-LAB.

4.5. Findings: Exploring meanings embedded in Tweets about London and fashion

4.5.1. A preliminary content analysis through Multidimensional Scaling Analysis

Multidimensional Scaling (MDS) Analysis was carried out to graphically represent the relationships among the most frequent keywords within a space of reduced dimensions (Figure 4.5). The objective of this analysis was to provide a first overview of the most important concepts (and their relations) discussed in the corpus of tweets. MDS is a technique for both multivariate and exploratory analysis. The final output is a spatial configuration of objects (i.e., points), where the distance among them corresponds to their proximity (i.e., similarity or dissimilarity). In other words, points that are close to each other represent similar objects (Wickelmaier, 2003). The keywords used for the analysis were automatically selected by T-LAB through the IF-TDF algorithm. The number of keywords in the chart was fixed at 70 in order to ensure a good readability of the graph. Then, co-occurrences between keywords, which refer to the number of elementary contexts (in this case sentences) where each lexical unit co-occurs with another (Lancia, 2017), were computed by means of an association index (i.e., similarity coefficient). In T-LAB, these indexes are obtained through a normalization of co-occurrence values concerning word pairs. This means that two words never occurring have an association index equal to 0. The association indexes available in T-LAB were Cosine, Dice, Jaccard, Equivalence, Inclusion, and Mutual Information. Due to the short length of tweets, co-occurrences were computed using the Cosine coefficient (Salton and McGill, 1983).

228

This index is defined by the following formula:

$$Cosine\ coefficent = \frac{a}{\sqrt{(a+b)} \times \sqrt{(a+c)}}$$

Where:

xy = Sequence of two words (lexical units) x and y

$a = f(xy)$ (number occurrences of the bigram xy in the corpus)

$b = f(x\bar{y})$ ($\bar{y}$ stands for any word except y)

$c = f(\bar{x}y)$ ($\bar{x}$ stands for any word except x)

This coefficient was used to compute proximity values included in the similarity matrices, which are the input tables used for MDS. These matrices are used for the interpretation of the relationship among objects in terms of proximity and distance. The Sammon's algorithm (Sammon, 1969) was applied to reduce the high-dimensional space represented by similarity matrices to a low dimensional space of the MDS map. More specifically, in Figure 4.5, keywords are represented on a two-dimensional scale in terms of their proximity, which reflects their co-occurrences in the corpus of Tweets. T-LAB uses the Sammon's method or stress function to measure the degree of correspondence between the MDS map and similarity matrices: the lower the level of stress, the higher the goodness of fit. In particular, the Sammon's method (stress function) is represented by the following formula:

$$s = \sum_{i \neq j} \frac{(d_{ij}^* - d_{ij})^2}{d_{ij}^*}$$

Where:

d_{ij}^*= distance between points i and j within the input matrix (similarity matrix)

d_{ij} = distance between points i and j within the MDS (Sammon's) map

From Figure 4.6, it is possible to observe that the stress index of MDS output is 0,16. This value shows a 'fair' correlation (i.e., goodness of fit) between the input matrix and Sammon's map (Wickelmaier, 2003). The size, positioning, and proximity between circles in the graphical representation enable to make some first considerations on the content of tweets. Firstly, the size of circles is related to the importance of keywords. Thus, the lemma FASHION WEEK prevails over all the other lemmas. Moreover, LONDON FASHION DESIGNERS, LONDON FASHION COMPANIES, DESIGNERS, and TRENDS are fairly significant if compared to the rest of keywords. Secondly, each quadrant of the graphical representation appears to refer to different themes that are included in the corpus of tweets.

In particular, the bottom left corner of the graph is mainly related to the fashion week event and the discovery and launch of new creative designers. It includes lemmas like FASHION WEEK, GRADUATE FASHION WEEK, CATWALK, MENSWEAR, DISCOVER, BRITISH, BRITISH FASHION COUNCIL, LONDON FASHION DESIGNERS, BRITISH FASHION COMPANIES, LONDON COLLEGE OF FASHION, CELEBRATE, CREATIVITY and CRAFTSMANSHIP. On the other hand, the top left corner seems to be associated with fashion-related events more generally, including lemmas like BOOKING, EVENT, EXHIBITION, LAUNCH, INSPIRATION, STUDENTS, CELEBRITY, PHOTOGRAPHY and PRESS. It is important to highlight that the keywords linked to the education system in this left section of the graph emphasize its significance in the promotion and showcase of local talents, as well as its strong connection to local fashion events.

The theme in the top right corner of the graph refers more to the process of distributing, showcasing, and communicating fashion design locally. It is particularly related to museums and the retail industry, including lemmas like TRENDS, TRENDS FROM LONDON, MUSEUM, MUSEUM EXHIBITION, VICTORIA AND ALBERT MUSEUM, STORY, RETAIL, STREETS OF LONDON, STREET and SHOP. On the other hand, the bottom right corner shows keywords concerning aspects of the designer fashion industry, other creative media industries and major fashion cities, probably in relation to the fashion week event. In particular, this corner is comprised of lemmas like LONDON FASHION COMPANIES, FOOTWEAR, APPAREL, ACCESSORIES, FASHION RECUITMENT AGENCIES, PARIS, NEW YORK, ART, and MUSIC. Moreover, the entire right section includes also keywords related to media like MAGAZINES, FASHION MAGAZINES, BLOG, and VIDEO.

This first analysis provides a first overview of the main themes addressed in tweets about

fashion in London. These are primarily related to the fashion week event and its capability of functioning as a platform for the launch of new creative designers, as well as of dictating and spreading fashion trends in the world. It also emerges the significance of an entire institutional system in support of this specific event and of other fashion-related exhibitions. In particular, this system is comprised not only of the education system (e.g., London College of Fashion, Graduate Fashion Week) and support institutions (e.g., British Fashion Council), but also of museums, media and retail that play an important role in showcasing, distributing and communicating fashion design locally. Lastly, some keywords emphasize interesting associations with other fashion capitals, as well as with other creative media industries like music.

Figure 4.6. Multidimensional Scaling (MDS) map of co-occurrences of keywords
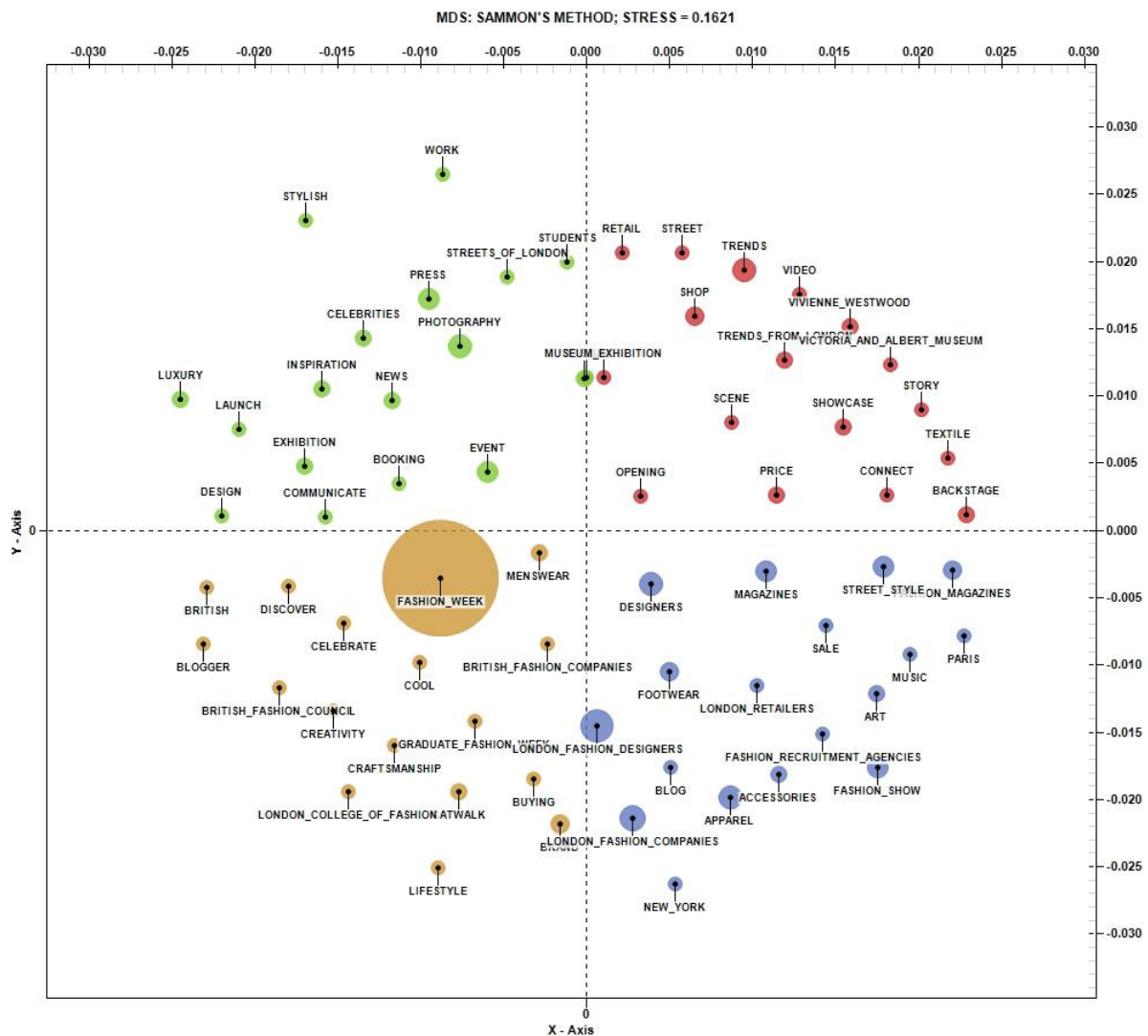
Sources: Author's elaboration using the 'Co-Word Analysis and Concept Mapping' tool of T-LAB.

231

4.5.2. Semantic Network Analysis: Detecting themes and their relations

Semantic network analysis was performed to extract and give a further and more in-depth insight of the main themes and their relations emerging from the sample of Tweets. In particular, it was aimed at identifying emerging clusters of concepts and their significant connections. This has allowed the identification of predefined categories of themes addressed in the discourse of London as a fashion city, which were used to perform the next Thematic Analysis of Elementary Contexts. Over time, the network theory has showed how the analysis of frequency, co-occurrence, and distances among concepts is highly important to explore meanings embedded in textual data. More specifically, concepts can be represented by words and network analysis allows the transformation of textual data into a network of words cognitively related to one another (Doerfel, 1998). Thus, nodes become words representing concepts, whereas edges (i.e., connections among nodes) refer to the relations (i.e., word co-occurrences) among these concepts. The analysis was performed on the entire sample of keywords, which was obtained according to the procedure explained in the research design section. In this case, relationships among keywords (i.e., edges) are not represented by co-occurrences, but by their 'probability' of being associated in the corpus of tweets.

Firstly, a Markovian analysis [62] of the sequence of keywords was performed. Sequence analysis refers to syntagmatic relationships among keywords, where each of them has a predecessor and a successor. More specifically, T-LAB generates an adjacency matrix (i.e., square table) with the predecessors and successors of each selected keyword. Occurrences of transition, which refer to the number of times in which one lemma precedes (or follows) the other, are recorded. The software computes the transition probabilities (i.e., markov chains) between predecessors and successors. Secondly, the transition occurrences are transformed into probability values, which are the probability that one lemma precedes (or follows) the other.

This analysis focuses on the probability that a keyword is both preceded and followed by another, without taking into account the specific sequence of words (i.e., predecessor and successor). Thus, the network is analysed as 'undirected' in order to observe relations among keywords in terms of their probabilistic co-occurrence. The semantic network resulting from

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[62] Markovian analysis is a statistic probabilistic technique used to forecast the future behavior of a variable or a system whose future state or behavior does not depend on the past history, but only on the present. More specifically, a Markov chain is a collection of random variables having the property that, given the present, the future is conditionally independent of the past (Markov, 1971).

this procedure was analysed by means of the software Gephi (Bastian et al., 2009), which was also used to compute basic centrality measure for the visualization of the network and to perform community detection through a modularity algorithm. In the network, edges are presented as straight lines and the force-layout algorithm used was Force Atlas, which pushes the most connected nodes (i.e., hubs) far from each other and aligns the nodes connected to the hubs in clusters around them in order to create a more readable graph (Paranyushkin, 2011).

The analysis focuses on degree centrality and betweenness centrality. These measures of centrality describe the significance of concepts, as well as highlighting different aspects of the relationship among concepts within a semantic network. Degree centrality has been one of the most utilized indices to represent the notion of significance. It refers to the number of edges that each node has within the same cluster of words. Thus, words with high degree centrality allow the identification of the most important concepts in the network. On the other hand, betweenness centrality shows how often a node appears on shortest paths between nodes in the network. As a result, words with high betweenness centrality function as junctions for communication, as they bridge together different clusters of words (Doerfel, 1998; Paranyushkin, 2011; Zhang et al., 2012; Veltri and Atanasova, 2015). Another step of the analysis concerned the detection of communities among closely related nodes (i.e., words), which was carried out using the modularity algorithm of Blondel et al. (2008). According to this community detection technique, nodes that are more densely connected together than with the rest of the network are considered to belong to the same community. In the graphical representation (Figure 4.7) size of nodes has been ranged according to their betweenness centrality, whereas colours indicate different communities determined by the modularity algorithm.

Before discussing the results of the analysis, it is important to give some quantitative insights on the structural properties of the network. Firstly, the average path length corresponds to the number of steps needed on average to connect two randomly selected nodes. The lower this number, the more interconnected is the network. The average path length of this graph, which is equal to 2,5, shows a relatively high connectivity of the network. Secondly, graph distance is the longest path between the nodes in the network. High distance values may indicate the presence of deviations within the corpus of tweets (i.e., words not related to central concepts). In this case, the distance, which is equal to 5, is on average and close to the average path length. That means that the whole network, including the periphery, is well connected to

central concepts and main contextual clusters. Lastly, the average degree, which is equal to 10, is related to the total number of edges (1795) divided by the number of nodes (179), showing how many connections each word has (on average) to other words in the corpus of tweets. A high number is an indication of frequent words in the text, whereas a low number of many repetitions (Newman, 2010). In particular, the majority of nodes have between 1 and 5 edges and only a few have more than 5 edges (see Appendix B – Figure B.1). Thus, it is possible to note that the connectivity of this network is relatively medium and that few words function as central concepts. Moreover, the modularity measure, which is higher than 0,4, shows that the partition computed through the modularity algorithm can be used to identify distinct communities in the network.

The nodes with the highest betweenness centrality in the network are FASHION WEEK (108), JOB (87), DESIGNERS (79), PHOTOGRAPHY (81), BRAND (68), TRENDS (68) and EVENT (67) (Table 4.3). These keywords, particularly the lemma FASHION WEEK, are the most influential lemmas in the network and are used to connect different contextual clusters of words. Thus, they function as central junctions for meaning circulation in tweets. Moreover, due to their highest degree centrality if compared to other keywords, they also define distinct contextual clusters around them acting as major local hubs. From Figure 4.6, it is possible to observe that each of these keywords is a central node in its own community (i.e., contextual cluster). These central lemmas, together with the communities clustered around them, play the most significant role in establishing the meaning and interpretation of the corpus of tweets. In particular, due to the highest betweenness and degree centrality of the lemma FASHION WEEK, it can be easily assumed that some of other lemmas and communities may function as mediators in the discursive field about this event. More specifically, it is possible to observe 5 main contextual clusters within the text.

The largest community (Cluster 1) is comprised of 34% of total nodes, and words belonging to it cluster around the lemmas DESIGNERS and BRAND. More specifically, words forming this community are mainly related to the designer fashion industry (e.g., READY-TO-WEAR, LEATHER, FASHION INDUSTRY, CRAFTSMANSHIP, MANUFACTURING, OWNER, FREELANCE, BUSINESS, TEXTILE, TEMPORARY, TEAM, PROJECT, ESTABLISH, SUSTAINABLE, INTERNATIONAL, SUPPORT, TECHNOLOGY, CONNECT, CREATIVITY, AVANT-GARDE, CLASSIC, PUNK, BRITISH) and the retail industry (e.g., RETAIL, SHOPPING, TRAVEL, SHOP, GUIDE, FLAGSHIP STORE, TEMPORARY, HIGH STREET, STREETS OF LONDON, EAST LONDON). Within this community, the

stronger connections (i.e., highest probabilistic co-occurrence) occur between the following couples of words: CELEBRITIES and HIGH STREET, INDIAN and DESIGNERS, STORY and FLAGSHIP STORE, ITALIAN and DESIGN, OPENING and OWNER. The lemmas INDIAN and ITALIAN are particularly interesting in highlighting the significance of London as a place of attraction and showcase of designers not only from London but from all over the world.

The second largest community (24%) is the cluster (cluster 2) around PHOTOGRAPHY. This community includes words not only associated with media (e.g., MAGAZINES, PRESS, BLOG), but also with arts (e.g., ART, CONTEMPORARY, MUSEUM, CULTURE, VICTORIA AND ALBERT MUSEUM) and the education system (e.g., STUDY, LONDON COLLEGE OF FASHION, SCHOOL, LONDON FASHION SCHOOLS, STUDENTS, EMERGING TALENT, COURSE). Other words belonging to this community are related to fashion style (e.g., MINIMALIST, STYLISH, ORIGINAL, VINTAGE, CASUAL, STREET-STYLE) and companies (e.g., BRITISH FASHION COMPANIES, LONDON FASHION COMPANIES, HEADQUARTERS). Within this community, the stronger connections occur among the following couples of words: STUDENTS and FASHION SHOW, LONDON FASHION COMPANIES and HEADQUARTERS, MINIMALIST and APPAREL, MUSEUM and LOS ANGELES, ART and COLLABORATION.

The third largest community (15,7%) is the cluster (cluster 3) around the lemma EVENT. Lemmas related to the organization of fashion-related events like CATWALK, EXHIBITION, MUSEUM EXHIBITION, BOOKING, ATTEND, BRITISH FASHION COUNCIL and PRESENTATION are part of this community. Moreover, this contextual cluster includes keywords related to other creative media industries like FILM, RADIO, TELEVISION, and MUSIC. Within this community, the stronger connections occur among the following words: MODEL and BLOGGER, EXHIBITION and MUSEUM EXHIBITION, EVENT, LONDON RETAILERS and BRITISH FASHION COUNCIL. In this regard, it is worth noting the connection between LONDON RETAILERS and BRITISH FASHION COUNCIL, which emphasizes the activity that this institution plays in support of local fashion retail.

The fourth largest community (15%) is the cluster (cluster 4) around FASHION WEEK. This contextual community shows the high importance of this event in establishing trends all over the world (e.g., TRENDS FROM LONDON, TRENDS). The lemmas PARIS, MILAN, NEW YORK, FLORENCE, and TOKYO indicate an interesting connection between this event and other major fashion cities in the world. Moreover, it is important to highlight that the

strongest associations in the network occur among the lemmas FASHION WEEK, GRADUATE FASHION WEEK and TRENDS FROM LONDON, showing the important relation among these elements in the local fashion ecosystem. The last community (cluster 5) includes 11,17% of total nodes and is clustered around the lemma JOB. As in cluster 1, lemmas belonging to this community are mostly associated with the designer fashion industry and retail industry (e.g., TRADE, COSTUMER, SALE, SAMPLE, PRICE, WHOLESALE, STOCK, SERVICE, MARKET, EUROPEAN).

It is highly important to point out that the detection of communities depends on the value of resolution applied before computing the modularity algorithm. Thus, different values of resolution lead to the identification of different clusters of words. More specifically, a higher resolution identifies less and larger communities, whereas a lower resolution detects more and smaller communities. However, the objective of this analysis was to better understand what the main concepts discussed through tweets are in order to support results emerging from previous analysis and to identify predefined clusters of themes needed to perform the TAEC. Overall, the semantic network extracted from the corpus of tweets shows a similar picture of the MDS with regards to the most relevant topics. FASHION WEEK is the most influential node, together with JOB, DESIGNERS, PHOTOGRAPHY, BRAND, TRENDS, and EVENT. In particular, due to the highest betweenness and degree centrality of the lemma FASHION WEEK, it can be easily assumed that some of the other lemmas and communities may function as mediators in the discursive field about this event. A significant cluster of words is linked to the designer fashion industry, particularly in terms of type of production, economic structure, and support institutions. Then, a group of words is associated with the organization of local fashion-related events, as well as with the promotional activity of media and museums. Other important themes discussed in tweets concern the education system, the retail industry, and local fashion style. Lastly, some keywords are related to other creative media industries, as well as other fashion cities in the world, particularly in relation to fashion week and other fashion-related events.

Starting from these general results of the MDS and SNA, the next step of the analysis was aimed at grouping together words into final conceptual clusters, which were defined through a manual content analysis and a sort of automatic K-means clustering, in order to assess the content of each concept in the discourse of London as a fashion city.

Figure 4.7. Semantic network of keywords' co-occurrences by Betweenness Centrality

Sources: Author's elaboration using the software Gephi.
Notes: Sizes of nodes refer to their betweenness centrality and different colours to their modularity class (group).
The layout used is Force Atlas.

Table 4.3. Centrality measures for keywords with highest Betweenness Centrality

Lemma	Betweenness Centrality	Degree Centrality
FASHION WEEK	3598,869553	108
JOB	2375,683386	87
DESIGNERS	2010,408234	79
PHOTOGRAPHY	1967,354309	81
BRAND	1455,274837	68
TRENDS	1440,095648	68
EVENT	1327,981868	67
MODEL	1290,341863	56
DESIGN	1254,142148	61
LONDON FASHION COMPANIES	1028,788267	60
APPAREL	928,071996	48
ART	924,071232	46
SHOWCASE	917,385553	48
WONDERFUL	915,976739	55
ACCESSORIES	883,65907	47
SHOP	813,508507	44
PRESS	807,150382	59
FASHION SHOW	778,365203	44
CREATIVITY	589,919107	39
CATWALK	567,12616	40

Sources: Author's elaboration using data computed through the software Gephi.

4.5.3. A content analysis through Thematic Analysis of Elementary Contexts

In order to explore in depth the content of the main thematic areas characterizing the discourse on London and fashion, a 'supervised' cluster analysis was performed on the overall sample of words. Clusters of words were defined according to a 'top-down' classification using a set of predefined categories generated deductively through a 'manual content analysis' (Lancia, 2012). Drawing upon results emerging from MDS and SNA, words referring to the same subject were grouped together into the following six clusters: 'INDUSTRY', 'EVENTS', 'EDUCATION', 'MEDIA', 'RETAIL' and 'STYLE'. Then, using the 'Dictionary Based Classification' tool of T-LAB, a personalized dictionary of categories was imported into the software. The tool 'Thematic Analysis of Elementary

Contexts' (TAEC) was used to explore the specific characteristics of the contextual clusters and the relationships among them.

In order to perform the TAEC, T-LAB classifies elementary contexts (in this case sentences) considering both the dictionary of categories and elementary contexts in terms of co-occurrence profiles (i.e. term vectors). Then, it computes their similarity measures. Firstly, it normalizes the 'seed vectors' that correspond to the k categories of the dictionary used and the 'term vectors' related to the elementary contexts analysed. Secondly, it computes the Cosine similarity and Euclidean distance between each i elementary context and each k seed vector. Thirdly, it assigns each i elementary context to the k category for which the corresponding seed is the closest. It then generates a contingency table lexical units × clusters ($n \times k$) and applies the Chi-Square test to all the intersections of the contingency table. Lastly, it performs a correspondence analysis of the contingency table lexical units × clusters. In other words, the software applies a sort of K-means clustering where k centroids have a predefined pattern. The quality of the analysis depends on the significance of the dictionary of categories generated deductively and the discriminant capacity of the classification used. In fact, if these factors reach their optimum, 'precision' and 'recall parameters' have values between 80% and 90% (Lancia, 2017).

Each cluster has a different weight based on the relationship among elementary contexts of the cluster and the overall elementary contexts in the corpus of tweets. Figure 4.8 shows the percentage of elementary contexts that belong to each cluster. As already explained in previous sections, elementary contexts correspond to 'sentences', which are defined as ECs ending with punctuation marks whose length is up to 1000 words. The number of elementary contexts classified in TAEC was 8,761. As highlighted in the pie chart below (Figure 4.7), the cluster 'EVENTS' accounted for the higher percentage of elementary contexts of the sample (35.4%). More specifically, it was comprised of 1,096 sentences. The clusters 'MEDIA' and 'STYLE' also included a relatively high number of elementary contexts (1,766 and 1,480) with a percentage on total ECs equal to 20.16% and 16.89%. Lastly, lower percentages of elementary contexts were reported for the clusters 'INDUSTRY' (10.55%), 'RETAIL' (8.83%) and 'EDUCATION' (8.23%), which included 924, 774 and 721 sentences respectively. Thus, it is possible to observe that the majority of tweets about London and fashion are associated with events. Promotional media system and local forms of style are also significant themes addressed in tweets, whereas the designer fashion industry, retail industry and education system seem to be of minor importance.

Figure 4.8. Percentage of elementary contexts belonging to each cluster
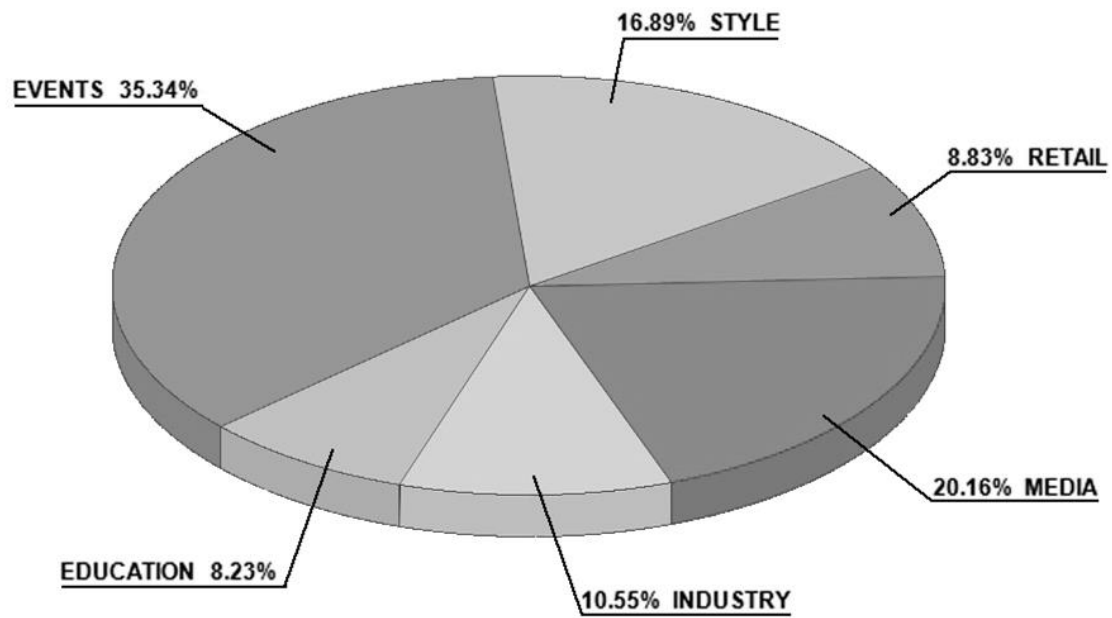
Figure 4.9 displays the relationships (i.e., similarities and differences) among the contextual clusters in a bi-dimensional space, where size of circles corresponds to weight of clusters. Results shown in this graphical representation confirm that the most important themes addressed in tweets are those found in the clusters 'EVENTS', 'MEDIA', and 'STYLE'. The proximity of clusters represents their 'similarity' in terms of lemmas that are included in the different groups. In this regard, 'RETAIL' and 'INDUSTRY' are the closest clusters in the graphical representation. Thus, these themes are likely to be addressed in the same typology of tweets under analysis. In order to explore and interpret clusters emerging from the statistical results, Table 4.4 displays the words with the highest Chi-Square value (ranked according to the decreasing value of Chi-Square) that are part of each cluster. In addition to Chi-Square values, the number of the elementary contexts containing each word (both in the

selected cluster and in total) is reported. A content analysis of each category is useful to shed light on which specific elements people address mostly when discussing on London and fashion on Twitter and to provide a clearer framework of people's perception of London as a fashion city.

Cluster 1: 'EVENTS'

Cluster 1, which is the one with the highest percentage of ECs (35.4%), denotes words related to fashion events held in London. In particular, most of the lemmas are associated with the showcase of fashion design collection and, more specifically, with the fashion week event (e.g., LONDON FASHION DESIGNERS, FASHION WEEK, APPAREL, BACKSTAGE, DESIGNERS, LONDON FASHION COMPANIES, MENSWEAR, HIGH-FASHION, INSPIRATION, FASHION SHOW, CATWALK, DEBUT). The lemma FASHION WEEK (6,625 occ.) mainly includes words related to the London Fashion Week Men's (4,151 occ.). This is mainly due to the period of collection of Tweets, when this specific event took place. Some other lemmas are associated with LFW in general (2,284 occ.) and with the Africa Fashion Week (190 occ.). Among the most frequently mentioned LONDON FASHION DESIGNERS, there are Matthew Miller, Jasper Garvida, Craig Green, Astrid Anderson, Matthew Williamson, Charles Geffrey and Maria Grachovogel. On the other hand, David Beckam, Burberry London, Cottweiler and Topman Design result as the most mentioned LONDON FASHION COMPANIES.

Other keywords, such as EVENT, ATTEND, EXHIBITION, CELEBRATE, LONDON FASHION EVENTS, BOOKING and AWARD, refer to fashion-related events more generally. In particular, the lemma LONDON FASHION EVENTS is comprised of the following events: 'Fashion Feast' and 'Pure London'. The former is a temporary local fashion and food festival, whereas the latter is a leading biannual fashion trade show in the UK. Among these events-related words, it is interesting to highlight the lemma MUSEUM EXHIBITION that includes 'Fashion in Motion' and the 'Balenciaga: Shaping Fashion'[63] exhibition at the V&A. This lemma remarks the significant role that museums play in showcasing fashion design locally. In addition, the keywords MIAMI, PARIS, MILAN, FLORENCE, NEW YORK, and HOLLYWOOD emphasize the symbolic association

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[63] 'Balenciaga Shaping Fashion' is an exhibition held at the V&A (from May 2017 to February 2018), which examines the work and legacy of the Spanish designer Cristóbal Balenciaga, showing over 100 pieces of its creations.

241

between these places and London fashion-related events. Lastly, the lemmas BRITISH FASHION COUNCIL and LONDON COLLEGE OF FASHION confirm the important connections between these institutions and the events aimed at showcasing fashion locally.

Cluster 2: 'MEDIA'

Cluster 2 is formed primarily by keywords referring to the communication of narratives and symbols associated with local fashion. More specifically, it includes a series of communication channels or 'gatekeepers' that serve for the transmission of fashion-related messages (e.g., PRESS, PHOTOGRAPHY, MAGAZINES, FASHION MAGAZINES, MODEL, BLOGGER, BLOG, VIDEO, FILM, MUSIC, FASHION AGENCY, RADIO, INSTAGRAM, PR, TELEVISION). Thus, these include not only traditional creative media industries like photography, press, film, music and television, but also digital channels like blogs, bloggers and social network platforms. In particular, the lemma MAGAZINES consists of the New York Times, in addition to The Guardian, WGSN, The Independent and Forbes. Moreover, the lemma FASHION MAGAZINES is primarily comprised of Fashion Channel, which is an Italian leading magazine for fashion content, together with British GQ, Vogue, Women's Wear Daily (WWD) and London Fashion Cat. Thus, it emerges that magazines dedicated to the dissemination of news on local fashion are not only from London or the UK but also from other parts of the world, particularly from the United States and Italy. Furthermore, the lemmas VICTORIA AND ALBERT MUSEUM and LONDON MUSEUMS remark the significance of local museums, particularly of the V&A, in dissipating messages about local fashion.

Cluster 3: 'STYLE'

Lemmas about local fashion style are reported in cluster 3, which draws attention to the typology of fashion design that is perceived to be part of the local scene. For example, the lemmas OUTLANDISH, WILD, DIVERSITY, ORIGINAL, AVANT-GARDE, and ENERGY emphasize the high levels of innovativeness, freedom and diversity that characterize fashion design in London. This image is strengthened by the presence of lemmas like STREET STYLE, ROCK, VINTAGE, PUNK that contribute to drawing a picture of London as a place characterized by an extremely vibrant and extravagant style. In contrast,

the lemmas CLASSIC and ICON recall the importance of a British style that is renowned for its elegance, simplicity, and iconic designs. This highly peculiar and original environment refers not only to designers' collections but also to events (e.g., lemmas FASHION WEEK and CELEBRITIES), fashion education system (e.g., lemmas COURSE and TALENT) and retail industry (e.g., lemma SHOPPING). Moreover, the importance (in term of occurrences) of lemmas like WONDERFUL and COOL can be interpreted as positive evaluations of this local fashion environment.

Cluster 4: 'INDUSTRY'

The fourth cluster seems to refer to the fashion industry. As an example, the following keywords are part of this cluster: BRAND, BUSINESS, MANAGER, FASHION INDUSTRY, PROJECT, TEAM, and HEADQUARTERS. Other lemmas, like ESTABLISH, OWNER, STUDIO, START UP, LAUNCH, and OPENING focus more specifically on designer fashion firms and their establishment. Another group of lemmas corresponds to the labour market and is probably part of tweets aimed at publishing job vacancies in the local fashion industry. Keywords like JOB, FASHION RECRUITMENT AGENCIES, FRELANCE, TEMPORARY, and WORK are included in this category. In addition, some lemmas like ACCESSORIES, CREATIVITY, CRAFTSMANSHIP, MANUFACTURING, PRODUCT, WOMENSWEAR, INNOVATION, TEXTILE, READY-TO-WEAR and TECHNOLOGY denote the typology of local fashion production and its manufacturing system. It is worth highlighting lemmas like CREATIVITY and CRAFTSMANSHIP as well as INNOVATION and TECHNOLOGY, which emphasize the importance of creativity and innovativeness in local production. Moreover, lemmas like CONNECT, SUPPORT, SERVICE, TRADE, and RETAIL are associated with activities in support of the local industry. Lastly, the lemmas MARKET, EUROPEAN, BREXIT, and INTERNATIONAL raise issues concerning BREXIT and its impact on the local fashion industry.

Cluster 5: 'RETAIL'

Tweets belonging to Cluster 5 focus on retail industry and shopping with reference to fashion tourism. As an example, the following keywords are part of this cluster: SHOP, SALE, WHOLESALE, RETAIL, SAMPLE, CUSTOMER, FLAGSHIP STORE, STOCK, and LONDON RETAILERS. In particular, the lemma LONDON RETAILERS is comprised of

Marks and Spencer, Farfetch, Liberty London, Topshop, Harrods and Asos. Part of the tweets in this cluster focuses on shopping and related fashion tourism (e.g., SHOPPING, STREETS OF LONDON, PRICE, HIGH STREET, BUYING, GUIDE, TRAVEL, CITY, TRENDS, EAST LONDON). It is worth noting that the lemma STREETS OF LONDON includes St. James's Street, Savile Row, Oxford Street, and New Bond Street. London-based department stores, fashion retailers, flagship stores in addition to the high street, specific fashion streets, and the East part of London are mentioned as main locations for shopping. The keyword CELEBRITIES is also part of this cluster, showing the connections between events and fashion retail.

Cluster 6: 'EDUCATION'

The last cluster is the smaller and collects words belonging to the education system. Keywords like STUDENTS, YOUNG, LEARN, SCHOOL, LONDON COLLEGE OF FASHION, RESEARCH, COURSE, LONDON FASHION SCHOOLS, STUDY, EDUCATION, and GENERATION are part of this cluster. In addition to the London College of Fashion, the lemma LONDON FASHION SCHOOLS contains the Central Saint Martins and Fashion Retail Academy. More specifically, some lemmas refer to the capability of this system of being an important platform not only for training but also for showcasing new talent from all over the world (e.g., GRADUATE FASHION WEEK, CONTEMPORARY, EXCLUSIVE, OPPORTUNITY, EMERGING TALENT, FASHION SHOW, TALENT, WORLD, AFRICAN). Most importantly, ART, CULTURE, and CREATIVITY shed light on the important connections between arts and the local education system, which strongly relies on creativity and culture. The keywords MUSEUM and LONDON MUSEUMS contribute to strengthening the association between local fashion schools and culture.

Figure 4.9. Cluster analysis

CLUSTERS
X = Fact. 1 (24.26%) ; Y = Fact. 2 (21.29%)
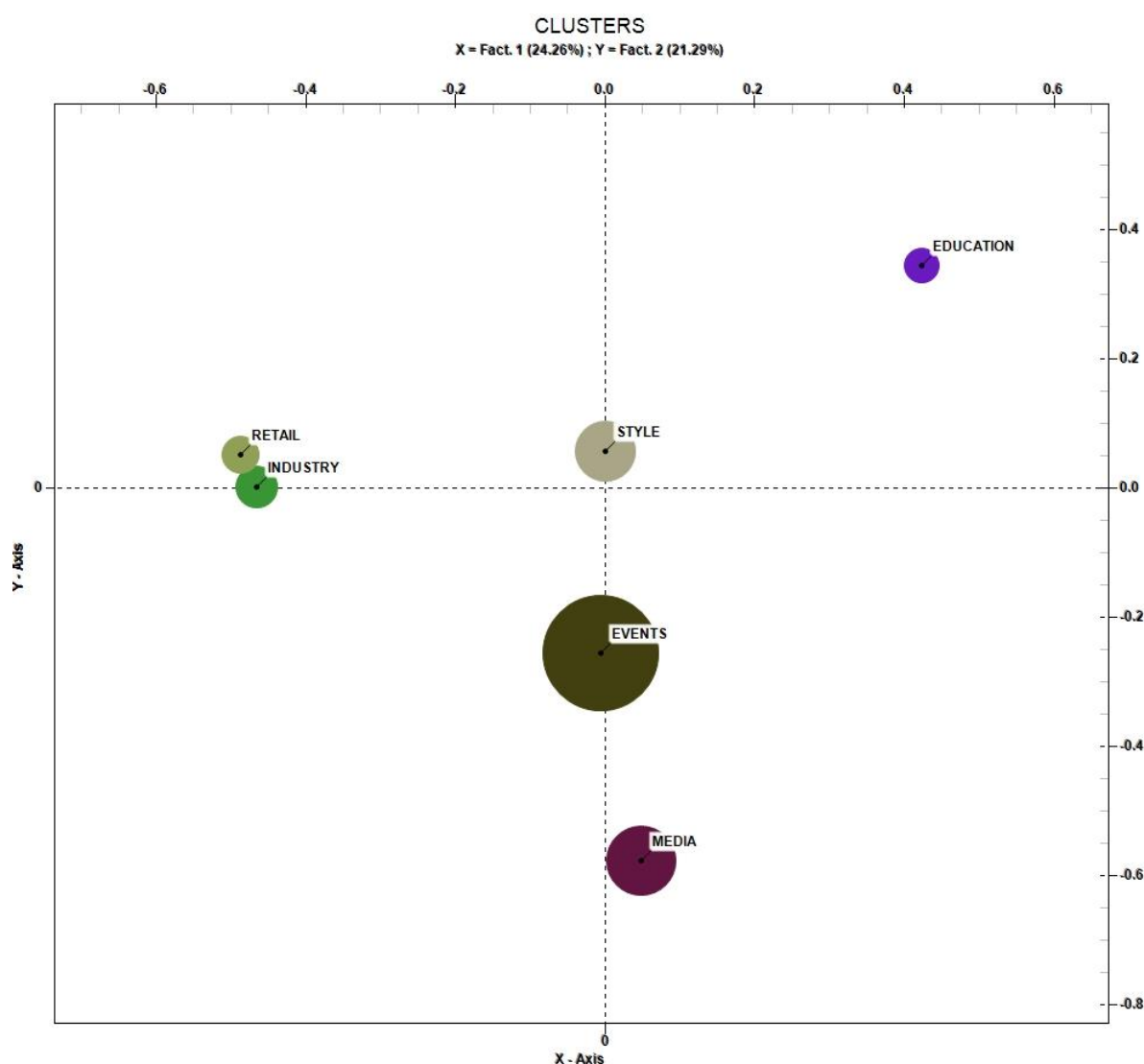
Sources: Author's elaboration using the software T-LAB.

Table 4.4. Keywords featuring in the conceptual clusters of TAEC

CLUSTER 1: EVENTS (Total lemmas: 286)				CLUSTER 2: MEDIA (Total lemmas: 255)			
Lemma	Chi-Square	EC in cluster	EC in total	Lemma	Chi-Square	EC in cluster	EC in total
LONDON_FASHION_DESIGNERS	1.350,84	1033	1175	PRESS	1744,42	434	436
FASHION_WEEK	580,47	2357	4431	PHOTOGRAPHY	1398,55	439	513
APPAREL	528,50	529	662	MAGAZINES	1306,62	418	494
BACKSTAGE	338,16	258	289	MODEL	661,75	192	212
DESIGNERS	335,88	455	631	FASHION_MAGAZINES	580,34	210	266

LONDON_FASHION_COMPANIES	300,21	443	631	BLOGGER	448,03	115	117
FOOTWEAR	273,25	269	333	BLOG	388,99	111	121
SHOWCASE	234,99	214	257	VICTORIA_AND_ALBERT_MUSEUM	383,99	117	133
VIVIENNE_WESTWOOD	176,51	156	185	VIDEO	375,27	105	113
EVENT	161,89	295	446	NEWS	310,23	144	210
MENSWEAR	161,01	207	281	COMMUNICATE	229,69	74	87
HIGH_FASHION	130,32	93	101	MUSEUM	200,75	99	149
MIAMI	124,69	76	77	FILM	190,48	52	55
INSPIRATION	116,91	133	173	MUSIC	137	72	112
PARIS	116,54	95	109	LONDON_MUSEUMS	97,66	48	72
BRITISH_FASHION_COUNCIL	96,52	81	94	FASHION_AGENCY	56	20	25
EXCITING	87,82	89	111	RADIO	35,84	9	9
ATTEND	86,62	70	80	INSTAGRAM	33,72	13	17
EXHIBITION	77,56	150	230	PR	26,94	15	24
CATWALK	75,14	121	176	TELEVISION	20,89	13	22

CLUSTER 3: STYLE (Total lemmas: 163)				CLUSTER 4: INDUSTRY (Total lemmas: 217)			
Lemma	Chi-Square	EC in cluster	EC in total	Lemma	Chi-Square	EC in cluster	EC in total
TRENDS	1518,62	415	565	JOB	1417,29	302	457
STREET_STYLE	989,49	331	512	FASHION_RECRUITMENT_AGENCIES	664,536	89	94
WONDERFUL	610,27	228	376	BRAND	565,723	163	302
OUTLANDISH	446,77	146	221	LONDON_BASED	301,616	61	88
LUXURY	439,64	139	206	BUSINESS	301,127	53	69
TRENDS_FROM_LONDON	386,23	170	308	MANAGER	289,794	53	71
STYLISH	320,83	78	97	PROJECT	238,842	46	64
DESIGN	243,71	98	168	MARKET	234,04	50	75
LIFESTYLE	242,76	85	134	LAUNCH	219,914	56	95
ROCK	205,58	48	58	READY-TO-WEAR	205,292	37	49
BRITISH	126,09	62	119	ENTREPRENEUR	186,964	47	79
CLASSIC	112,5	39	61	EUROPEAN	185,535	32	41
ICON	74,17	32	57	TEAM	183,558	47	80
COOL	65,99	36	73	TECHNOLOGY	175,155	35	50
WILD	63,31	23	37	FASHION_INDUSTRY	153,114	40	69
VINTAGE	56,87	25	45	WORK	141,042	66	164
PUNK	54,12	13	16	STUDIO	137,33	32	51
DIVERSITY	47,89	15	22	SUPPORT	129,106	43	87
ORIGINAL	37,84	9	11	CONNECT	127,362	57	138
AVANT_GARDE	32,41	7	8	CREATIVITY	127,281	53	123

246

CLUSTER 5: RETAIL (Total lemmas: 207)				CLUSTER 6: EDUCATION (Total lemmas: 109)			
Lemma	Chi-Square	EC in cluster	EC in total	Lemma	Chi-Square	EC in cluster	EC in total
SHOP	2846,01	307	325	STUDENTS	1570,29	168	186
STREET	1176,46	124	128	ART	1541,64	209	281
SALE	985,78	115	129	YOUNG	1004,18	138	187
SHOPPING	686,78	71	72	UNITED_KINGDOM	882,37	135	199
STREETS_OF_LONDON	501,29	82	120	GRADUATE_FASHION_WEEK	702,51	86	106
PRICE	409,8	44	46	CONTEMPORARY	400,1	62	92
HIGH_STREET	360,08	40	43	EXCLUSIVE	366,27	73	131
CELEBRITIES	352,3	105	236	OPPORTUNITY	294,8	35	42
WHOLESALE	291,55	43	58	LEARN	271,6	40	57
RETAIL	283,4	78	166	IDEA	214,76	32	46
SAMPLE	162,61	23	30	COLLABORATION	204,35	35	56
CUSTOMER	155,94	23	31	SCHOOL	186,97	29	43
FLAGSHIP_STORE	155,74	17	18	EMERGING_TALENT	178,42	32	53
BUYING	126,36	45	113	LONDON_COLLEGE_OF_FASHION	156,22	54	141
GUIDE	112,93	20	31	FASHION_SHOW	156,16	108	419
STOCK	112,25	26	49	CULTURE	154,66	23	33
TRADE	92,54	21	39	LOS_ANGELES	138,03	17	21
STORY	63,81	36	118	TALENT	136,7	25	42
TRAVEL	63,37	18	39	RESEARCH	113,56	16	22
CITY	56,57	26	76	COURSE	109,47	31	71

Sources: Author's elaboration.
Notes: The table shows the first 20 keywords (ranked according to the decreasing value of Chi-Square) that characterize each cluster. For each word Chi-Square values and the sums of the elementary contexts in which the word is found (both in the selected cluster and in total) are displayed.

### 4.5.4. Word Association Analysis of fashion events, firms, designers and museums

Word Association analysis (WAA) was carried out to measure, explore, and map the word co-occurrences and similarity relationships of some selected keywords, which were considered particularly significant to the purpose of the study. The following lemmas, which are related to London-based fashion events, companies and designers, were selected to analyse their most frequent words' associations: FASHION WEEK (6,625), LONDON FASHION COMPANIES (844), DESIGNERS (722) and EVENT (583). Moreover, WAA was carried out on the lemma MUSEUM (161), which is less frequent in the corpus but highly important to understand how this element is intertwined with the local fashion ecosystem.

247

Word co-occurrences were computed within each elementary context (threshold =10) through the Cosine association index. Radial diagrams display the selected keywords in a multidimensional space, where the lemma subject to analysis is placed at the centre of the plot and its most co-occurring words are distributed around it. More specifically, the co-occurring words around the selected lemma are distributed with a distance proportional to their degree of association. In graphical terms, the keywords closer to the centre co-occur more frequently with the selected term at the centre. In other terms, the more two words co-occur in elementary contexts of the corpus, the more they are closed in the dimensional space. These statistically significant relationships are univocal and mono-directional (i.e., from the keyword at the centre to each of the other words distributed around it). T-LAB returns a map with the most frequently occurring keywords (i.e., up to 20 lemmas with the highest values for the Cosine coefficient) for each of the selected term. However, the add/remove item feature was used to include/exclude co-occurring words to the map, which were regarded as more or less important for further analysis and discussion. More detailed tables including the Cosine index for each of the lemmas associated with a selected keyword are presented in Appendix B.

The lemmas mostly associated with the keyword FASHION WEEK are displayed in the radial plot of Figure 4.10. Among the most recurring lemmas there are STREET STYLE, TRENDS FROM LONDON, TRENDS and INSPIRATION, which highlight the strong correlation between the London Fashion Week event and its capability of generating new inspiring trends throughout the world. In particular, the street style comes originally from the British fashion culture and is related to highly inspirational outfits worn by people in the streets. The lemmas MAGAZINE, PRESS, and PHOTOGRAPHY recall the importance of this type of media in disseminating the new trends from the LFW globally, as well as in building a narrative that contributes to continuously reinforcing the image of London as a major fashion centre. Most importantly, the GRADUATE FASHION WEEK keyword points out the significance of this event, which is a leading international exhibition for fashion graduates that allows students from the UK and the rest of the world to showcase their collections. Moreover, the associations with the lemmas LONDON RETAILERS and SHOPPING emphasize the connections between the fashion week event and fashion retail in London. Lastly, VIVIENNE WESTWOOD is the fashion designer whose name co-occurs more frequently with the selected keyword. To sum up, this analysis confirms how the London fashion week is perceived as an event capable of disseminating new inspiring trends

and styles globally. These tend to originate from young graduates and are mainly transmitted through the role of press and photography. Moreover, it seems to have important associations with the retail industry.

Figure 4.10. Word associations between the lemma FASHION WEEK and other lemmas in the corpus
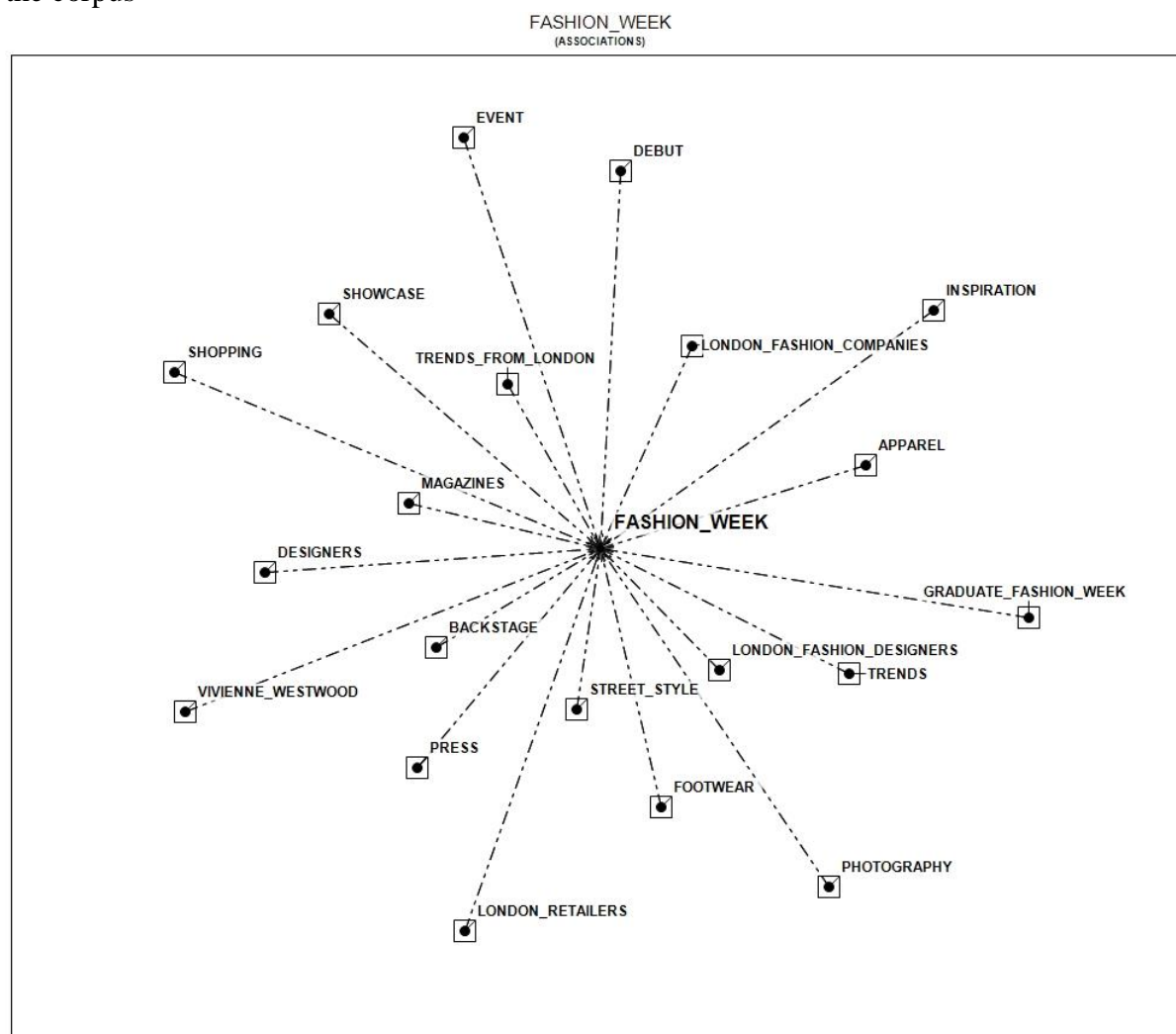
Figure 4.11 displays the WAA for the keyword LONDON FASHION COMPANIES. Firstly, its recurring associations with the lemmas TELEVISION, HOLLYWOOD, MUSIC, and FILM are particularly significant. In fact, they emphasize connections between the local designer fashion industry and other creative and media industries. The lemmas COLLABORATION and SUPPORT may recall the local support activity around this industry.

Moreover, AVANT GARDE, ART, and VICTORIA AND ALBERT MUSUEM highlight the perception of these companies as associated with artistic, aesthetic and avant-garde values, as well as with museums. Lastly, the keywords FASHION WEEK, LAUNCH, and CATWALK show linkages between these companies and local fashion events. This analysis is particularly important to shed light on the associations between London fashion companies and other creative and media industries, as well as their connections to avant-garde, art, and museums.

The most frequently co-occurring keywords with the lemma DESIGNERS are displayed in the radial plot of Figure 4.12. The analysis of its word associations allows improving the understanding of how London fashion designers are perceived and communicated on social media. Firstly, among the most recurring lemmas, it is possible to identify a series of keywords related to fashion events: SHOWCASE, EXHIBITION, FASHION WEEK, FASHION SHOW, and MUSEUM EXHIBITION. These lemmas principally refer to events that show designers' collections not only through fashion shows but also exhibitions in museums, which seem to be highly specific to this peculiar fashion ecosystem. Other lemmas like LONDON COLLEGE OF FASHION, EMERGING TALENT, YOUNG, DEBUT, and STUDENTS shed light on the significance of the local education system and its capability of being an important pool of young and talented fashion designers. ART and INSPIRATION recall how London is regarded as a highly artistic and inspiring environment for fashion designers and might be also related to the characteristics of its education system.

In addition, keywords like SUPPORT, BRITISH FASHION COUNCIL, WORK, FASHION RECRUITMENT AGENCIES and CONNECT highlight the role that institutions play in the support of fashion designers, particularly in terms of facilitating their entry into the job market. Thus, the analysis of this lemma contributes to sketching a picture of the local designer fashion industry, which is perceived as highly rooted in local events and the education system. London is considered as a pool of highly talented designers. These are usually young and graduated from local schools and have the opportunity to emerge and enter the artistic and inspiring local fashion scene through showcase events, exhibitions in museums and the support of local institutions like the British Fashion Council.

Figure 4.11. Word associations between the lemma LONDON FASHION COMPANIES and other lemmas in the corpus
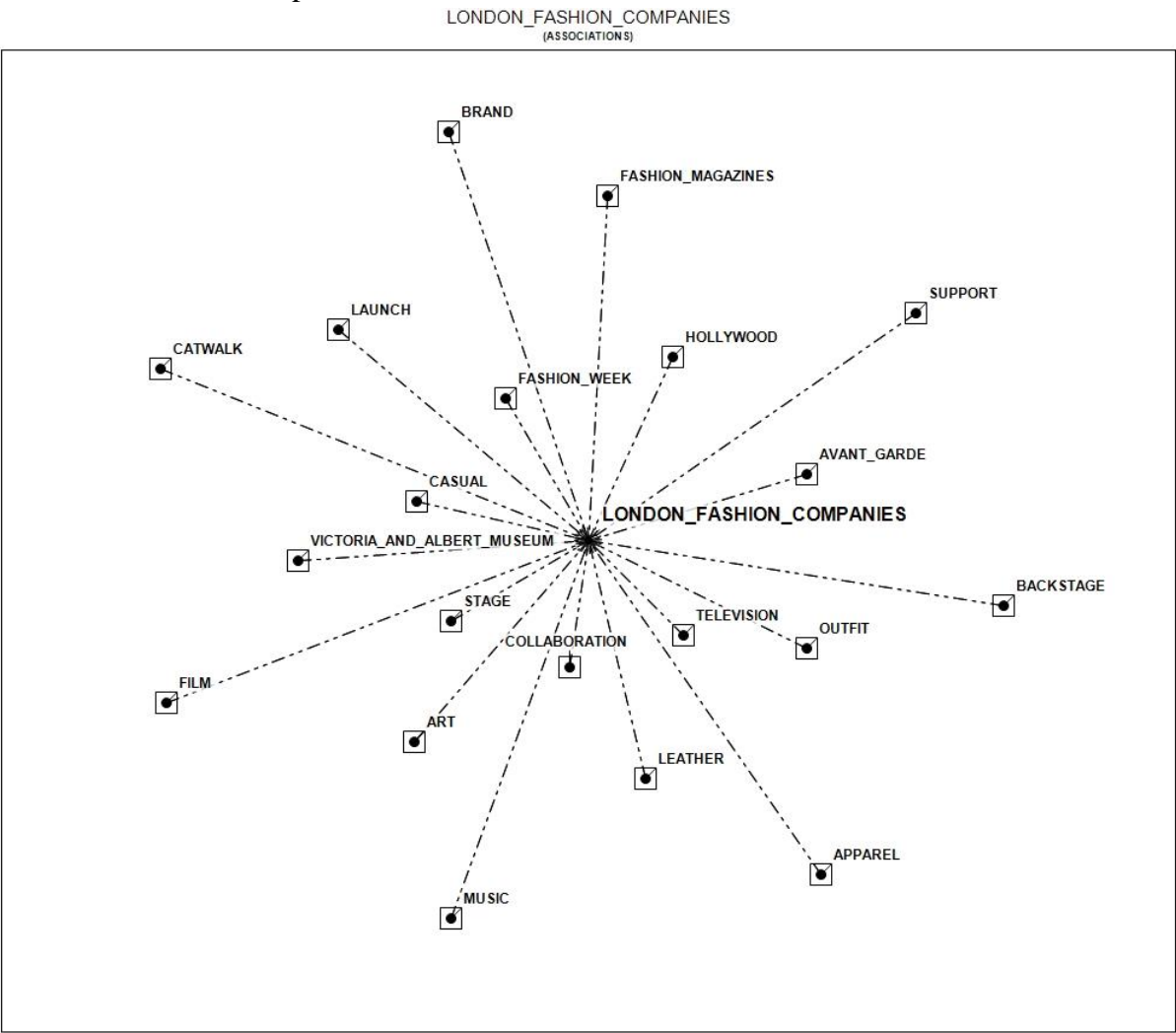
LONDON_FASHION_COMPANIES
(ASSOCIATIONS)

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: the graph shows the lemmas most associated with the lemma LONDON FASHION COMPANIES in the corpus of tweets. The selection of associated lemmas is based on the Cosine coefficient as association index. The association value of each lemma is graphically represented in terms of distance from the keyword placed at the centre of the diagram.

Figure 4.12. Word associations between the lemma DESIGNERS and other lemmas in the corpus
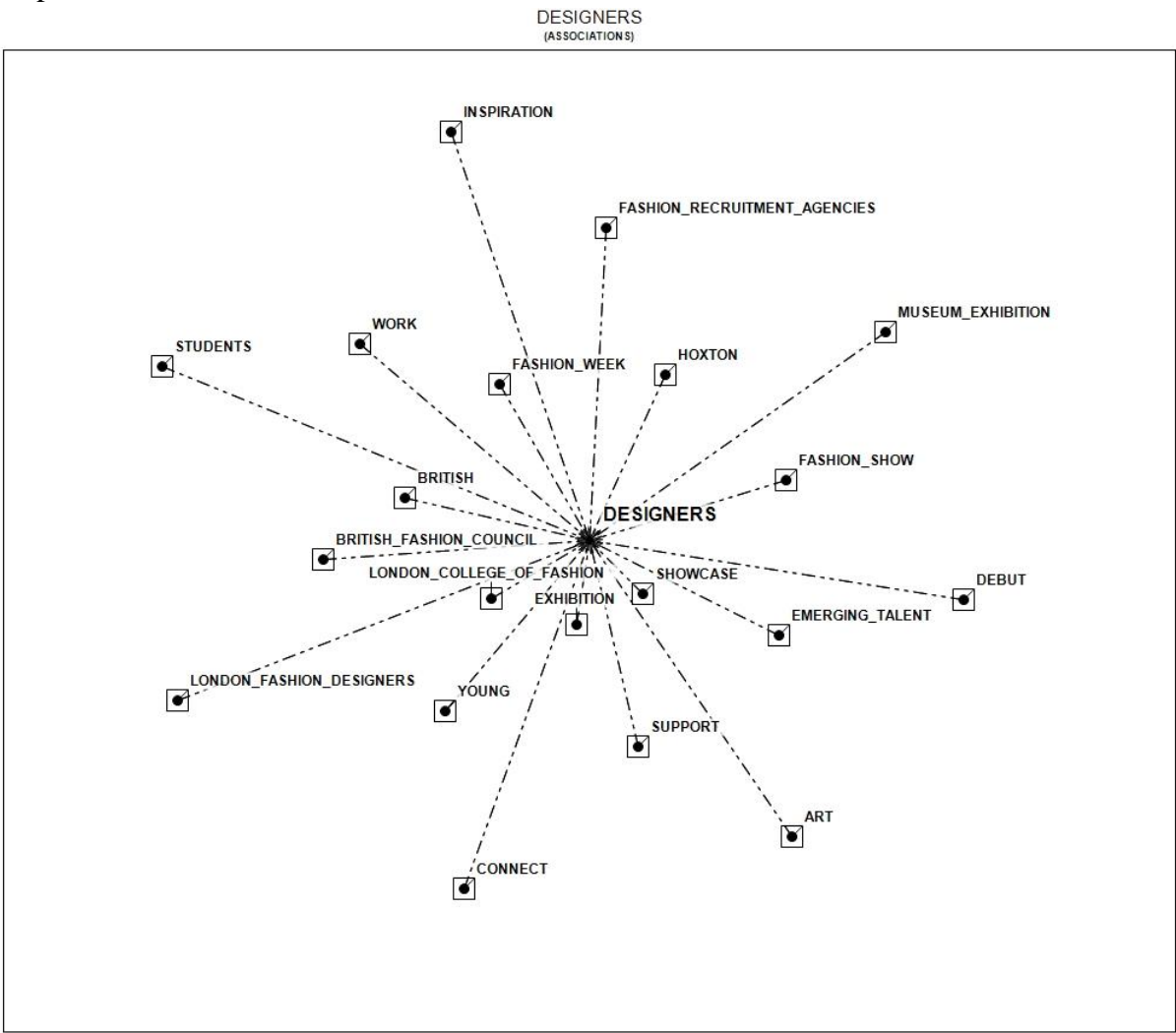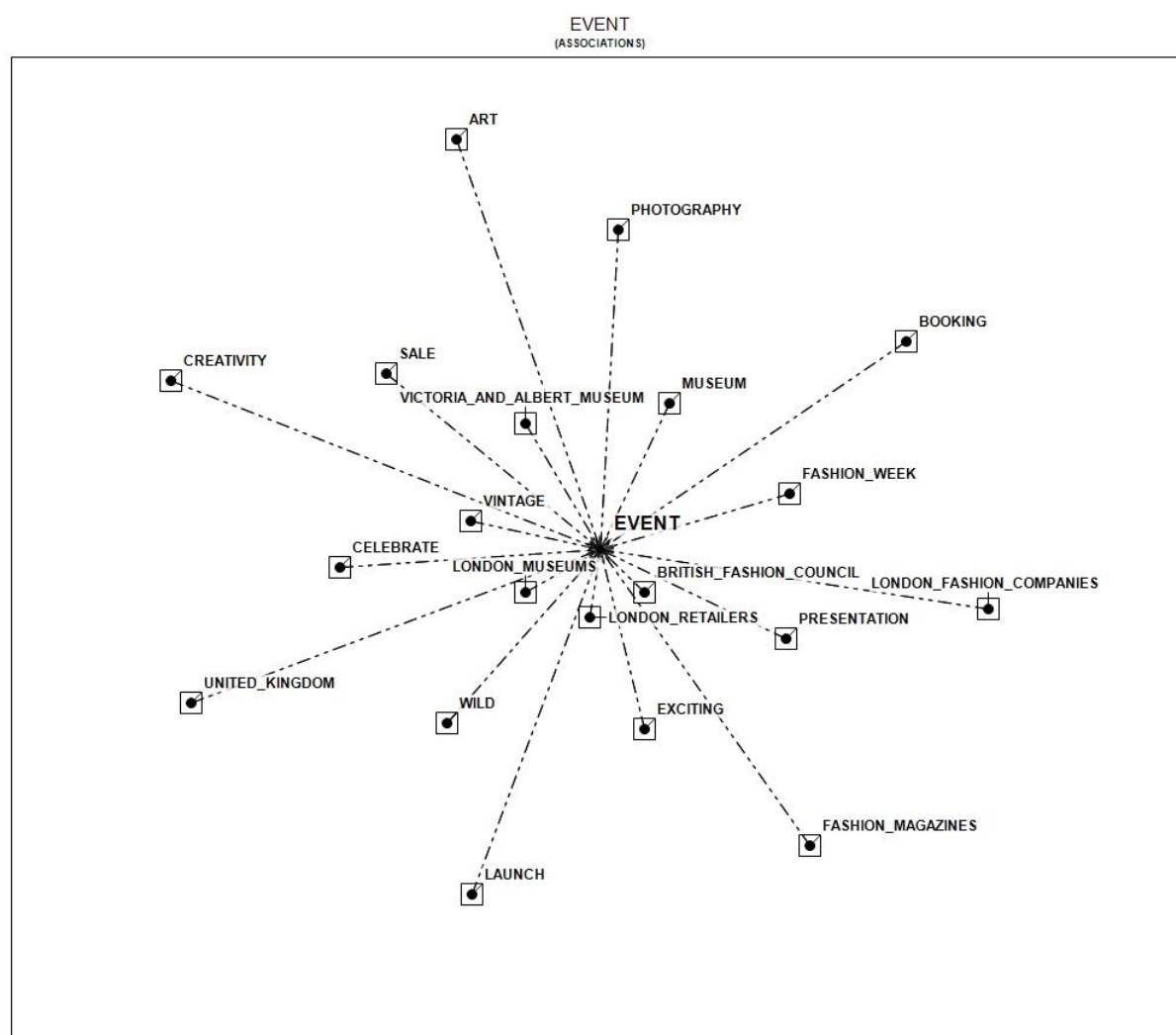

DESIGNERS
(ASSOCIATIONS)

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: the graph shows the lemmas most associated with the lemma DESIGNERS in the corpus of tweets. The selection of associated lemmas is based on the Cosine coefficient as association index. The association value of each lemma is graphically represented in terms of distance from the keyword placed at the centre of the diagram.

Figure 4.13 shows the keywords that are mostly associated with the lemma EVENT. This analysis contributes to improving the understanding of the typology of fashion events that take place in London. The most co-occurring word is BRITISH FASHION COUNCIL. This connection recalls the crucial role that this institution plays in supporting fashion-related events in London. Local fashion events are mostly represented by the lemma FASHION WEEK, and other related lemmas like PRESENTATION, CELEBRATE, BOOKING and LAUNCH. Most importantly, the associations with LONDON MUSEUMS, VICTORIA AND ALBERT MUSEUM and MUSEUM, which are among the most frequently associated

keywords, reinforce the significance of London museums in showing designers' creations and functioning as an important local form of fashion media, in addition to PHOTOGRAPHY and FASHION MAGAZINES. Moreover, the lemmas LONDON RETAILERS and SALE shed light on the strong connection between local fashion events and retail, which functions as another important media capable of contributing to the dissemination of local fashion. Other keywords like WILD, CREATIVITY AND ART draw attention to the perception of London fashion events as highly connected to creativity and art, as well as being characterized by high levels of freedom.

Concerning the keyword MUSEUM (Figure 4.14), the two most frequently occurring lemmas are VICTORIA AND ALBERT MUSEUM and LONDON MUSEUM, which includes the Serpentine Galleries, the Barbican and the Fashion and Textile Museum. The lemmas EXHIBITION, BUYING, OPENING, EVENT, BOOKING are related to fashion-related events that take place in these museums. In particular, as already explained, the keyword MUSEUM EXHIBITION groups together the 'Fashion in Motion' event and the temporary exhibition 'Balenciaga: Shaping Fashion'. The lemmas COURSE, STUDENTS, and LONDON COLLEGE OF FASHION are particularly significant and emphasize a connection between the local fashion education system and fashion-related events held in museums. Lastly, as might be expected, ART, CULTURE, and CREATIVITY are also among the most co-occurring lemmas with the selected keyword.

Figure 4.13. Word associations between the lemma EVENT and other lemmas in the corpus

EVENT
(ASSOCIATIONS)

Notes: the graph shows the lemmas most associated with the lemma EVENT in the corpus of tweets. The selection of associated lemmas is based on the Cosine coefficient as association index. The association value of each lemma is graphically represented in terms of distance from the keyword placed at the centre of the diagram.

Figure 4.14. Word associations between the lemma MUSEUM and other lemmas in the corpus
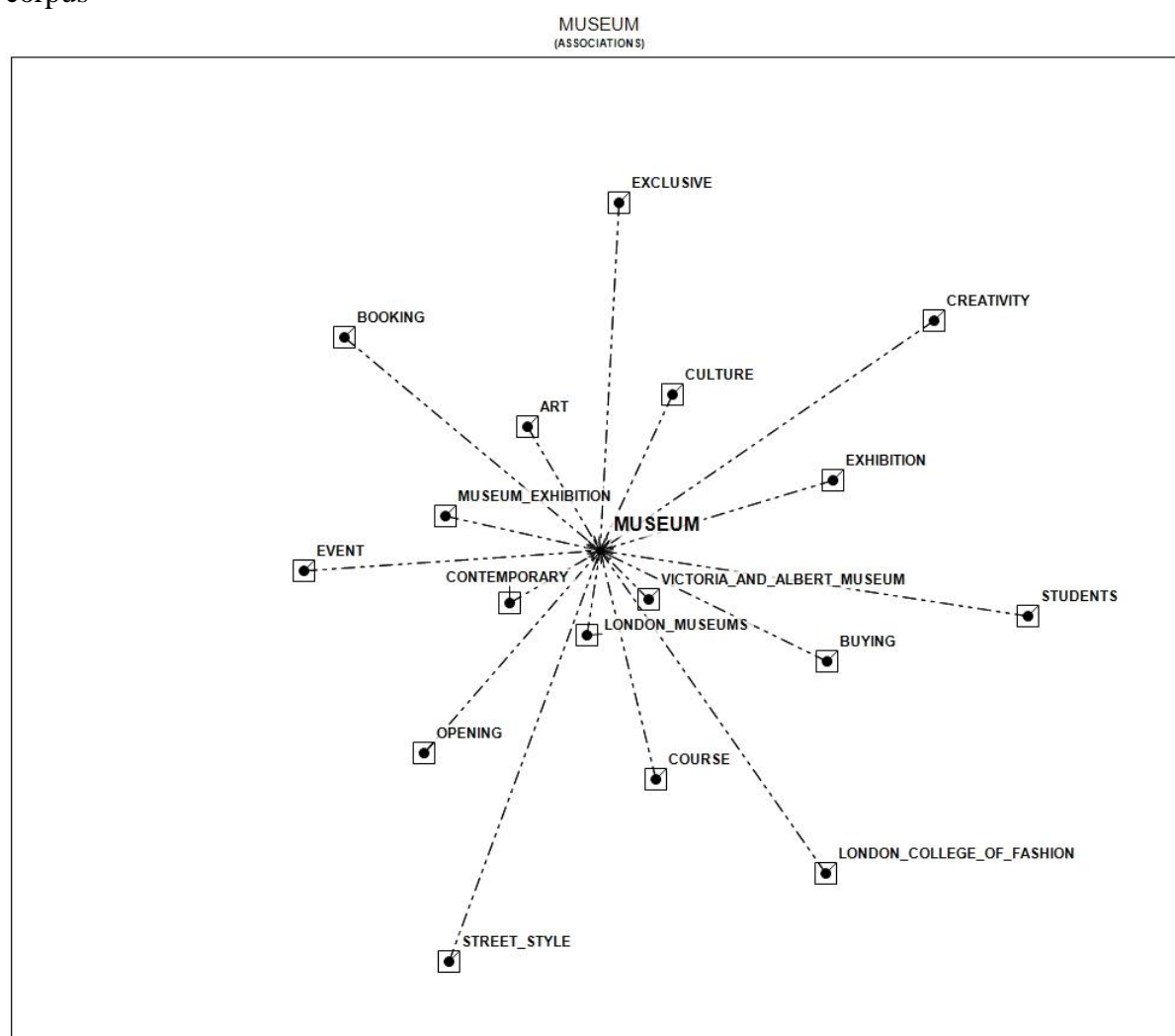
MUSEUM
(ASSOCIATIONS)

4.6. The discourse of London as a fashion city by dimension

Each analysis has contributed to highlighting different aspects of the narrative about London and fashion that is embedded in tweets. The combination of their results enables the identification of latent structures of mental and social representations linked to people's perception of London as a fashion city on Twitter. The principal aim of the chapter was to complement the previous descriptive analysis of London that was carried out from a 'supply-side' perspective, drawing upon an analysis of this fashion city from a 'demand-side'

perspective. In order to compare results emerging from the two analyses, this section attempts to draw a picture of the discourse of London as a fashion city using the ideal types' dimensions. Thus, 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system' are now analysed according to the findings that have emerged from this new analysis (Table 4.5). It is important to remark that tweets about London and fashion primarily referred to the 'promotional media system', whereas the other dimensions, particularly the 'education system' and 'retail environment', seemed to be of minor importance in terms of people's interest on Twitter.

ECONOMIC STRUCTURE

Several tweets focus on the fashion industry, particularly in terms of designer fashion firms, fashion production, and labour market. The most mentioned local fashion houses are Vivienne Westwood, David Beckam, Burberry, Cottweiler and Topman Design. The local designer fashion industry appears to be highly rooted in local events (particularly the LFW) and the education system. London-based fashion companies seem to have strong associations with other creative media industries (e.g., television, music, film, entertainment), art, and local museums. Moreover, they are symbolically connected to artistic, aesthetic, and avant-garde values. Local fashion production is mostly described as characterised by womenswear, accessories, ready-to-wear, and textile products. Some tweets make connections between local fashion production and creativity, craftsmanship, innovativeness, and technology. In particular, a large number of tweets are aimed at communicating job vacancies in the local fashion industry. Furthermore, there also emerge concerns related to the BREXIT and its impact on the local fashion industry.

HUMAN CAPITAL

Some tweets remark the importance of London of being a place of attraction of designers from all over the world (e.g., Africa, India, Italy). London is considered a pool of highly talented fashion designers, who are usually young and graduated from local schools, and have the opportunity to enter the inspiring local fashion scene through showcase events and the support of institutions like the British Fashion Council. In particular, Matthew Miller, Jasper Garvida and Craig Green are listed as the most mentioned local fashion designers. A significant number of tweets draw attention to the typology of local fashion style, which is

highly positively evaluated. Innovativeness, freedom, energy, diversity, originality, and avant-garde are symbolically connected to local fashion designers, and to the overall local fashion ecosystem. Specific fashion styles like street-style, rock, vintage, and punk are linked to London's fashion culture in tweets. However, some tweets also emphasize a more traditional British style, which is renowned for its elegance, simplicity, and iconic designs (e.g., Savile Row bespoke suit).

EDUCATION SYSTEM

London's education system is perceived on Twitter as an important platform not only for training but also for showcasing new talented and young designers from all over the world. Of particular importance is the Graduate Fashion Week, which is a leading international event organized by local higher education providers to allow graduate fashion students to show their collections to the public. In addition to the London College of Fashion that is the object of a high number of tweets, Central Saint Martins and Fashion Retail Academy are also mentioned among the local fashion schools. Most importantly, many tweets emphasize the important association between local fashion education and art, creativity and culture, with particular reference to local museums.

INSTITUTIONAL INFRASTRUCTURE

It emerges the significance of an institutional system in support of local fashion events, and particularly the fashion week. This system is comprised not only of support institutions and the education system, but also of media, retailing and museums that also play an important role in favouring the showcase of fashion collections. Moreover, many tweets also emphasize the role that local institutions play in support of the local designer fashion industry and of fashion designers, particularly in terms of facilitating their entry into the job market. Overall, the British Fashion Council and London College of Fashion appear as the main actors involved in this support activity.

RETAIL ENVIRONMENT

Tweets about fashion retail in London are mostly associated with the retail industry and shopping activity with reference to fashion tourism. London-based department stores, fashion retailers, flagship stores in addition to the high street, specific fashion streets, and the East part of London emerge as main locations for shopping. Marks and Spencer, Farfetch, Liberty London, Topshop, Harrods and Asos are the most mentioned local fashion retailers, whereas St. James's Street, Savile Row, Oxford Street, and New Bond Street are the most mentioned fashion streets. Some tweets draw attention to fashion retail as an important form of local tourism. Important associations also emerge between the LFW event and London-based retailers and shopping activity.

PROMOTIONAL MEDIA SYSTEM

The London Fashion Week (LFW) is perceived as an extremely important platform for the launch of new talented designers. It is particularly associated with high levels of creativity, art, freedom, and inspiration. Moreover, the LFW seems to be symbolically connected to other major fashion cities in the world like Paris, Milan, New York, Tokyo, Florence and Miami, as well as to specific places like Hollywood. In addition to the LFW, other showcase events and trade shows like the Africa Fashion Week London (AFWL) and Pure London have emerged from the analysis. Of particular importance are fashion exhibitions organized in local museums like the 'Balenciaga: Shaping Fashion Exhibition' and 'Fashion in Motion' at the V&A, which are strongly connected to the local fashion education system. London-based fashion designers and companies show strong connections to local fashion events and the LFW. Many tweets stress the importance of these events in dictating and disseminating new inspiring fashion trends throughout the world, particularly by means of a rich and varied promotional media system.

A series of communication channels emerge as the main tools for the transmission of narratives and symbols about local fashion on Twitter, as well as for reinforcing the image of London as a major fashion centre. Among these, there are not only traditional creative media industries like press, photography, video, film, music, radio, and television, but also digital communication channels like blogs, bloggers and social network platforms. It also emerges that magazines dedicated to the dissemination of news about local fashion on Twitter are not

only from London or the UK, but also from other parts of the world, particularly from the United States and Italy (e.g., New York Times and Fashion Channel). Moreover, local museums, particularly the Victoria and Albert Museum in addition to the Serpentine Galleries, the Barbican and the Fashion and Textile Museum, function as significant local media capable of disseminating a narrative about London and fashion.

Table 4.5. The discourse of London as a fashion city by dimension

FASHION CITY / DIMENSIONS	LONDON
ECONOMIC STRUCTURE	• Vivienne Westwood, David Beckam, Burberry, Cottweiler and Topman Design are the most mentioned London-based fashion companies; • The designer fashion industry appears to be highly rooted in local fashion events and education system; • These companies seem to have strong associations with other creative media industries (e.g., television, music, film, entertainment), art, and local museums, and are symbolically connected to artistic, aesthetic, and avant-garde values; • Local fashion production is mostly described as characterised by womenswear, accessories, ready-to-wear, and textile products, and connected to creativity, craftsmanship, innovativeness, and technology; • There emerge significant concerns related to the BREXIT and its impact on the local fashion industry.
HUMAN CAPITAL	• London is perceived as a place of attraction of designers from all over the world (e.g., Africa, India, Italy); • London is considered as a pool of highly talented fashion designers, who are usually young and graduated from local schools, and have the opportunity to enter the inspiring local fashion scene through showcase events and support institutions; • Matthew Miller, Jasper Garvida and Craig Green are listed as the most mentioned local fashion designers; • Innovativeness, freedom, energy, diversity, originality, and avant-garde are symbolically connected to local fashion designers, and to the overall local fashion ecosystem; • Specific fashion styles like street-style, rock, vintage, and punk, as well as a more traditional British style, are linked to London's fashion culture in Tweets.
EDUCATION SYSTEM	• London's education system is perceived as an important platform not only for training but also for showcasing new talented and young designers from all over the world such as through the Graduate Fashion Week; • The London College of Fashion is the most mentioned higher education provider specializing in fashion on Twitter; • Important associations emerge between local fashion education and art, creativity and culture, with particular reference to local museums.
INSTITUTIONAL INFRASTRUCTURE	• It emerges the significance of an institutional system in support of local fashion events, and particularly the fashion week; • This system is comprised not only of support institutions and the education system, but also of media, retailing and museums that also play an important role in favouring the showcase of fashion collections; • Many tweets emphasize the role that local institutions play in support of the local designer fashion industry and of fashion designers, particularly in terms of facilitating their entry into the job market; • The British Fashion Council and London College of Fashion appear as the main actors involved in this support activity.

RETAIL ENVIRONMENT	• London-based department stores, fashion retailers, flagship stores, in addition to the high street, specific fashion streets, and the East part of London emerge as main locations for shopping; • Marks and Spencer, Farfetch, Liberty London, Topshop, Harrods and Asos are the most mentioned local fashion retailers, whereas St. James's Street, Savile Row, Oxford Street, and New Bond Street are the most mentioned fashion streets; • Some tweets draw attention to fashion retail as an important form of local tourism; • Important associations also emerge between the LFW event and London-based retailers and shopping activity.
PROMOTIONAL MEDIA SYSTEM	• The London Fashion Week is perceived as an extremely important platform for the launch of new talented designers, and is associated with high levels of creativity, art, freedom, and inspiration; • It is symbolically connected to other major fashion cities in the world like Paris, Milan, New York, Tokyo, Florence and Miami, as well as to specific places like Hollywood; • Of particular importance are fashion exhibitions held in local museums like the 'Balenciaga: Shaping Fashion Exhibition' and 'Fashion in Motion' at the V&A; • Local fashion events are perceived as important for dictating and disseminating fashion trends throughout the world, particularly by means of a rich and varied promotional media system; • Traditional creative media industries but also digital communication channels emerge as the main tools for the transmission of narratives and symbols about local fashion; • It also emerges that magazines dedicated to the dissemination of news about local fashion on Twitter are not only from London or the UK, but also from other parts of the world; • Local museums, particularly the V&A, function as significant local media capable of disseminating a narrative about London and fashion.

Sources: Author's elaboration.

4.7. Using Twitter data to compare fashion's world cities: An explorative analysis

The aim of this last section is to assess the validity of the methodology presented earlier in the chapter as a means of comparing people's perception of a variety of fashion centres. This work draws upon the social media platform Twitter to compare the discourse of New York, London, Milan and Paris as major fashion cities in the world. It is only an explorative study and more detailed analyses are recommended for future research. The main objective is to identify possible similarities and differences in the way these centres are 'narrated' on social media, and to possibly determine particular key aspects for each of the fashion cities under investigation. As already discussed in the introduction of the present dissertation, to validate the analytical framework, the two analyses carried out on London need to be replicated in other major and minor fashion cities. Thus, this work is a first attempt in this direction. To execute the analysis, comprehensive and chronological 'batches' of tweets associated with the four selected fashion centres were collected over a one-month period at the beginning of 2018. Amongst all the techniques for analysing and exploring meanings embedded in textual data

that were presented in the previous analysis, Multidimensional Scaling (MDS) analysis was regarded as the best suited to providing a general overview as well as comparing the most significant concepts and their relations within the different corpora of tweets.

4.7.1. Data collection and methodology

Tweets on the selected fashion's world cities were collected from 8th February to 6th March 2018. This period of data collection includes the bi-annual Women's Fashion Week event that was held in early 2018 in New York (8st − 16th February February), London (16st − 20th February), Milan (21st − 27th February) and Paris (27th February − 6th March). As already discussed in the dissertation, the fashion week event attracts a great deal of interest either on the web or on social media platforms like Twitter. In this regard, Figure 4.15, which graphically represents the total number of tweets gathered for each city per day of collection, shows a significant increase in the number of messages posted during the fashion week event for each of the hosting cities. The time for data collection was specifically selected to compare the fashion's world centres over a period that might include the same major event for each city. Moreover, it enables a comparison with the previous analysis of London, which was carried out drawing upon data collected during the London Fashion Week Men's event. Concerning the drawbacks of including a major event in the period of data collection, reference is made to the research design of the previous broader study of London.

Data were collected using Netlytic (Gruzd, 2016), which is an online data mining tool from the main social media platforms. As in the case with NCapture, this data collection mechanism relies on Twitter API to collect publicly available tweets. However, it makes it possible to gather data from a specified Twitter search every 15 minutes for a period up to 31 days, thus facilitating the collection of a higher number of tweets. Limitations of Twitter API can be found in the research design of the broader London's analysis. Data were collected via the following search terms: New York (AND) fashion, London (AND) fashion, Milan (AND) fashion and Paris (AND) fashion. The data search collected only data written in English, which is the most used language on Twitter, in order to facilitate the comparative text analysis between the selected cities. The total number of tweets collected during the period of tracking was 102,096 (N=102,096) for London, 94,267 (N=94,267) for New York, 86,453 (N=86,453) for Paris and 79,614 (N=79,614) for Milan.

Table 4.6. displays the total number of authors who have posted tweets for each city under

investigation. Overall, a large and varied sample of contributors published an average of 1 - 2 tweets, with the top-ten authors, who were mostly represented by fashion stylist, bloggers and retailers, contributing 2% - 3% to each batch of data. Unfortunately, the number of geo-located messages for the four samples was very low (around 1%) and therefore it is not possible to discuss the geographical distribution of tweets. Data were then pre-processed to ensure that the content of tweets was in line with the purpose of the analysis and might facilitate the identification of a narrative on fashion's world cities. Thus, redundant, misleading and multiple tweets as well as retweets were deleted from the databases in order to avoid possible distortion in the results. As shown in Table 4.6, the final dataset consisted of 51.770 (N=51.770) original tweets for New York, 41.404 (N=41.404) original tweets for London, 27.260 (N=27.260) original tweets for Paris and 21.038 (N=21.038) original tweets for Milan.

Figure 4.15. Number of tweets on fashion's world cities by day of collection (8th February – 6th March 2018)
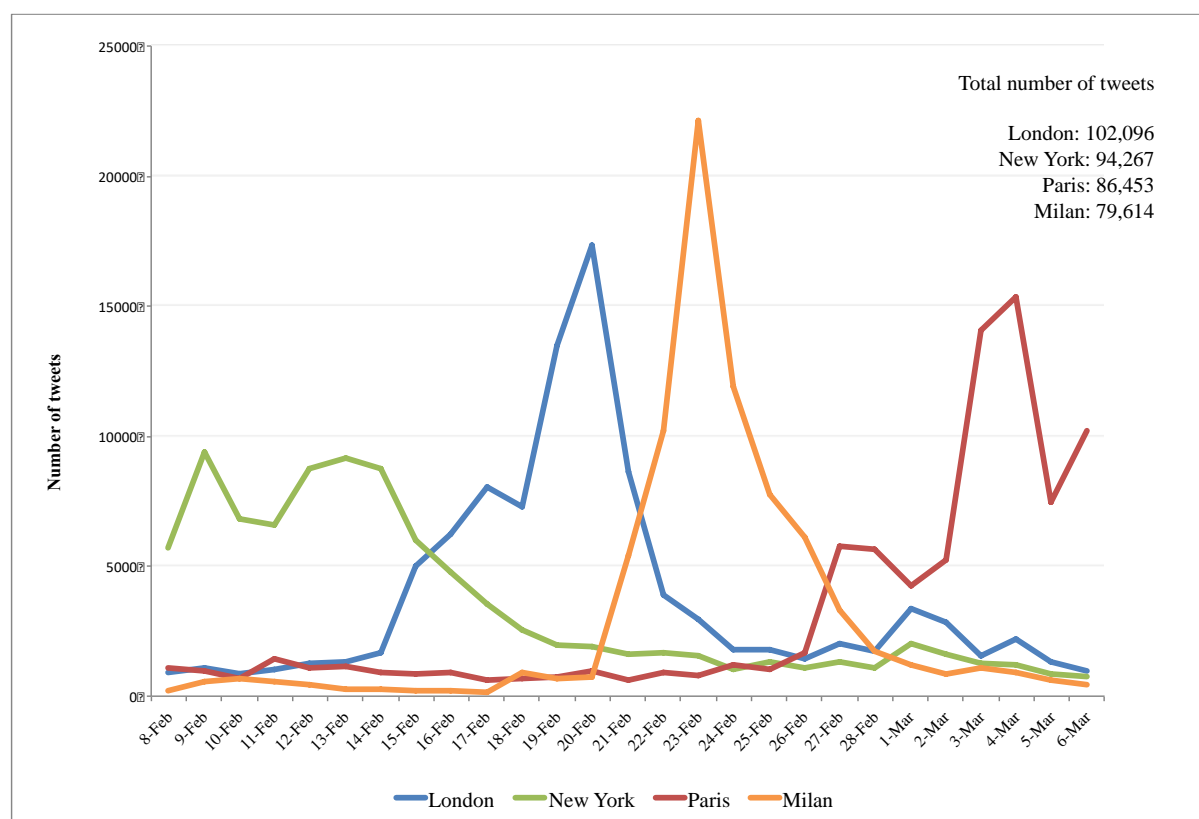
Sources: Author's elaboration using data collected through Netlytic.

Table 4.6. Total number of tweets and contributors for New York, London, Milan and Paris

Tweets City	Total number of tweets	Total number of original tweets	Percentage of original tweets	Total number of authors	Percentage of tweets posted by top-ten authors	Percentage of authors posting 1 tweet
New York	94,267	51,770	55%	48,004	3%	77%
London	102,096	41,404	41%	63,606	3%	82%
Milan	79,614	21,038	26%	57,733	2%	89%
Paris	86,453	27,260	32%	44,124	2%	76%

Sources: Author's elaboration using data collected through Netlytic.

Following the same procedure adopted for the previous analysis of London, the four databases of original tweets were then prepared for quantitative text analysis. Particular attention was drawn to the selection of keywords for each corpus of tweets associated with New York, London, Milan and Paris. A customized multi-word list, including both words subject to lexicalization (e.g., HIGH-QUALITY, HAUTE COTURE, READY-TO-WEAR) and proper names of people, places, companies and institutions (e.g., RALPH LAUREN, TOUR EIFFEL, BRITISH FASHION COUNCIL) was created and imported in the system during the transformation of the databases into the final corpora of tweets. Through the computation of the TF-IDF (Term Frequency – Inverse Document Frequency), T-LAB automatically selected 2,000 keywords for each corpus of tweets. However, due to the high significance of keywords for final results, these were carefully checked to ensure a good quality of final samples.

Lexical units with not relevant content (e.g., TODAY, JANUARY, MONTH, YEAR) were excluded and others were renamed or grouped together into single lemmas according to a synonyms and content analysis. The categorization of keywords was carried out in accordance to the same grouping of lexical units adopted for the study of London. However, proper names of designers, companies, retailers and events have been not grouped together to make particular features of different cities more explicitly. The final customized lists included 420 keywords for New York (minimum threshold of 10 occurrences), 300 keywords for Paris

(minimum threshold of 10 occurrences), 297 keywords for Milan (minimum threshold of 10 occurrences) and 215 keywords for London (minimum threshold of 30 occurrences). In all the corpus vocabularies, the type/token ratio was led than 20% and the hapax percentage was less than 50%, indicating the consistency of the statistical approach (Bolasco, 1999). A Multidimensional Scaling (MDS) analysis was carried out to graphically represent the most important concepts (and their relations) for each city under investigation. As already explained in depth earlier in the chapter, the final output of MDS is a spatial configuration of objects where the distance among them corresponds to their proximity (i.e., similarity or dissimilarity). In the selection of keywords to be included in the MDS maps, some keywords that showed a high occurrence for all the corpora of tweets (e.g., FASHION WEEK, MAGAZINES, TRENDS, CATWALK, MODEL, FASHION SHOW, APPAREL, ACCESSORIES, PHOTOGRAPHY, COLLECTION, DESIGNER), as well as the names of each fashion's world city were excluded to highlight the specificities of each fashion centre. A more detailed future analysis might consider including these elements in the text analysis.

4.7.2. Findings: Exploring meanings embedded in tweets about fashion's world cities

The number of keywords in each chart was fixed at 70 to ensure a good readability of the graph. Due to the short length of tweets, the co-occurrences between keywords were computed using the Cosine association index and proximity values were included in similarity matrices. The Sammon's method or stress function was then used to measure the degree of correspondence between the MDS map and similarity matrices. The value of the stress index for each of the MDS outputs (Figure 4.16, 4.17, 4.18, 4.19) shows a 'fair' correlation (>10) between the input matrices and Sammon's maps, indicating a fairly good fitting solution (Wickelmaier, 2003). In the four graphs below, the size of circles, which refers to the number of keywords' occurrences, and their proximity, which is related to their similarity in terms of co-occurrences, serve to explore and discuss the content of tweets for each city under investigation. Moreover, each corner of the graphical representations may be associated with several macro-themes that are found in tweets. The most important ties (i.e., connections) between keywords are made visible in the graphs only when the association index is greater than 0.15.

The most significant keywords from tweets on New York and fashion are shown in the MDS map of Figure 4.16. Firstly, a number of keywords are related to American fashion houses and designers: TOM FORD, ALEXANDER WANG, MARC JACOBS, CALVIN KLEIN, CAROLINA HERRERA, RALPH LAUREN, KATE SPADE NEW YORK, COACH, JEREMY SCOTT, STUART WEITZMAN, PRABAL GURUNG, TIFFANY, MAYBELLINE, TORY BURCH and VICTORIA'S SECRET. Only a few keywords are associated with non-American fashion houses and designers: BOTTEGA VENETA, PHILIPP PLEIN, ZADIG AND VOLTAIRE and RAF SIMONS. The keyword DEBUT, which is amongst the most frequently occurring lemmas, in addition to INSPIRATION, LAUNCH, ROCK, CREATIVITY and DIVERSITY, contribute to drawing a picture of New York as a place where discovering new trends and designers. A strong connection exists between the keywords DESIGN and ART, which is also reinforced by the presence of the lemma MUSEUM in the bottom right corner of the graph. Moreover, some lemmas (i.e., SCHOOL, STUDENT and YOUNG) are related to the local education system. There is a strong focus on the fashion industry, which is emphasised by keywords like JOB, INDUSTRY, COMPANY, BUSINESS, WORK and CAREER. In close proximity to these lemmas, there are the keywords EXCLUSIVE, LUXURY and ELEGANT.

The lemmas CELEBRITY, HOLLYWOOD, FILM, ENTERTAINMENT, CRITIC, MARVEL (i.e., Marvel studios) and OSCAR refer to the strong connections between New York fashion and the film industry. The lemmas VOGUE and PRESS, which are amongst the most frequent keywords in the sample of tweets, highlight the significance of the media industry for New York fashion. The keyword POLITICS draws the attention to the association between fashion and the world of politics. Lastly, the keywords SHOPPING, STREET, MARKET, RETAIL, MANHATTAN, BROOKLYN, TRAVEL, GUIDE, BUYING, STOCK and ARCHITECTURE are associated with shopping opportunities, specific geographical areas of New York and tourism. In sum, the narrative on New York fashion relies on the presence of established and internationally renowned American fashion houses and designers, as well as on the significance of the local industry, with a particular focus on the arts, the education system and the launch of new designers. Significant connections between fashion and the film and media industry also emerge from the sample of tweets. Moreover, shopping opportunities and tourism associated with fashion are described as key elements in the discourse of New York as a major fashion centre.

Figure 4.16. Multidimensional Scaling (MDS) map of keywords from tweets on New York
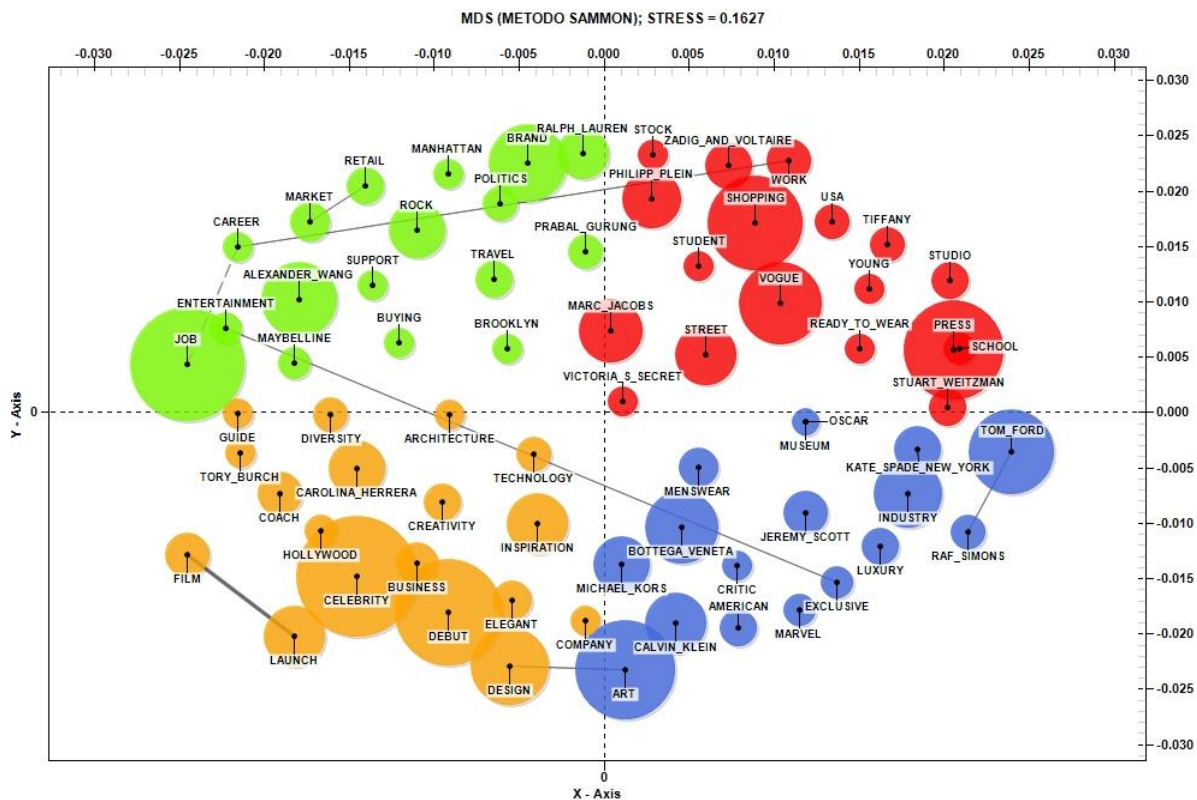
Sources: Author's elaboration using the 'Co-Word Analysis and Concept Mapping' tool of T-LAB.

Figure 4.17 displays the most important keywords for the sample of tweets on London and fashion. A large number of lemmas, which are mostly represented in the upper left corner, are associated with the local education system (i.e., LONDON FASHION SCHOOLS, COURSE, SUSTAINABILITY, LAUNCH, STUDENT, SCHOOL and YOUNG). In particular, the lemma 'LONDON FASHION SCHOOLS' includes the following London-based educational institutions: LONDON COLLEGE OF FASHION (387 occurrences), CENTRAL SAINT MARTINS (175 occurrences) and UNIVERSITY OF WESTMINSTER (133 occurrences). Looking at the bottom left corner, the local fashion design industry, which is represented by lemmas like BRAND, INDUSTRY, JOB, MARKET and BUSINESS, is strongly linked to the keywords CREATIVITY, DESIGN, ART, LUXURY and INSPIRATION. In particular, the lemmas DEBUT, LAUNCH, TALENT, DIVERSITY, EXCITING, and OPPORTUNITY emphasize people's perception of London as a place where new and diverse talent can be discovered. In the same corner, the lemmas BRITISH FASHION COUNCIL and SUPPORT highlight the support activity for the local fashion design industry.

266

The luxury fashion house BURBERRY, in addition to its chief creative officer CHRISTOPHER BAILEY, are represented amongst the most frequently occurring lemmas. In terms on number of occurrences, these are followed by a few other British fashion houses and designers: VICTORIA BECKHAM, VIVIENNE WESTWOOD, RICHARD MALONE, MULBERRY, CHRISTOPHER KANE and JIMMY CHOO. In the upper and bottom right corners, a group of keywords (i.e., TAILOR, VINTAGE, SMALL BUSINESS, BESPOKE, COUTURE, HANDMADE) highlight the symbolic associations between craftsmanship and the remaining local production. The keyword SHOPPING, which is listed among the most frequently occurring lemmas in the sample, together with the lemmas UNITED KINGDOM, TRAVEL, STREET, CUSTOMER and BUYING, refer to the significance of shopping experience and of fashion tourism in the discourse of London as a fashion centre.

The bottom right corner displays lemmas that are mostly associated with fashion-related events: LONDON FASHION EVENTS, CELEBRITY, AWARD, RED CARPET, DISCOVER, MODEST FASHION WEEK [64], PRESENTATION and SHOWCASE. The keyword 'LONDON FASHION EVENTS' includes the following events: PURE LONDON (183 occurrences) and FASHION SCOUT [65] (124 occurrences). Thus, the significance of London as a place where discovering new emerging talent emerges also from this new sample of tweets. Additionally, the keywords LONDON MUSEUMS, CULTURE, GALLERY emphasize the importance of art and culture in the showcase of local fashion. In particular, the 'LONDON MUSEUMS' lemma is comprised of the FASHION AND TEXTILE MUSEUM (187 occurrences) and the NATIONAL PORTRAIT GALLERY (149 occurrences). Some of the most frequent keywords (i.e., MUSIC, FILM, VOGUE) are associated with the music and film industry, as well as with the media industry. Lastly, another significant connection in the mental representation of London fashion is the one associated with the royal family (i.e., lemmas QUEEN ELIZABETH and ROYAL). Overall, results are in line with what has emerged from the analysis of London carried out using twitter data collected during the LFWM. The main elements associated with the discourse of London as a major fashion centre are the local education system, fashion events and shopping opportunities. There is a strong focus on the launch and discovery of new and diverse talent, as well as on the support of the local fashion design industry, which is strongly linked to creativity, art, museums and

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[64] The Modest Fashion Week is an event that celebrates modest fashion by designers from around the world, and showcases the latest trends in hijabs, abayas and long hemlines.
[65] Fashion scout, which is an international showcase for fashion pioneers, is regarded as the UK's largest independent showcase for emerging and established creative design talent during London Fashion Week.

craftsmanship. Moreover, there also significant connections with the music, film and media industry, as well as with the royal family.

Figure 4.17. Multidimensional Scaling (MDS) map of keywords from tweets on London
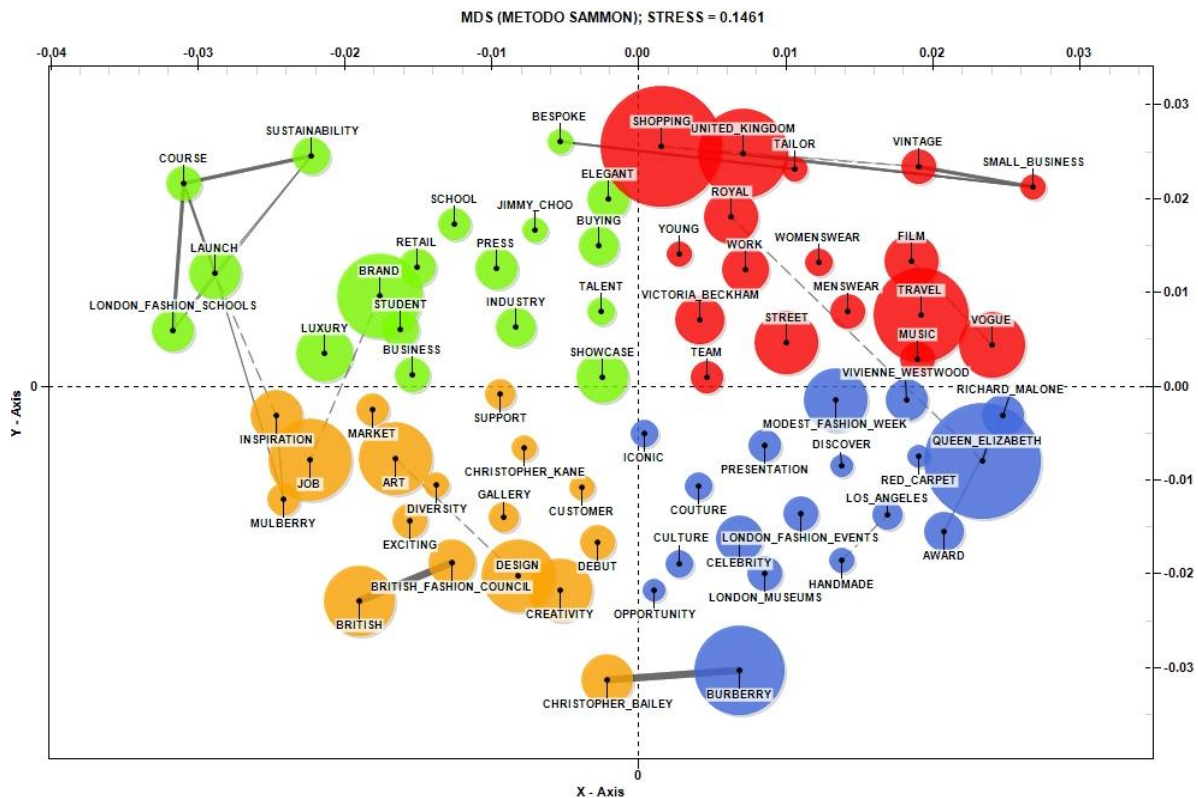
Sources: Author's elaboration using the 'Co-Word Analysis and Concept Mapping' tool of T-LAB.

The most important keywords for the sample of tweets on Milan and fashion are shown in the MDS map of Figure 4.18. The most frequently occurring lemmas refer to traditional Italian luxury fashion houses and designers (i.e., DOLCE AND GABBANA, GUCCI, PRADA, FENDI, MOSCHINO, EMILIO PUCCI, MISSONI, VERSACE, ROBERTO CAVALLI, EMPORIO ARMANI, GIORGIO ARMANI, DONATELLA VERSACE, ALESSANDRO MICHELE, ALESSANDRO DELL'ACQUA, BULGARI, MAX MARA, MARNI, PHILOSOPHY, ETRO, GRIANFRANCO FERRE). Lemmas like HEADQUARTERS, INDUSTRY, BUSINESS, BRAND, JOB, DESIGN, CREATIVITY, LUXURY, ITALIAN, INTERNATIONAL, ELEGANT and ICONIC draw the attention to the significance and key features of the local fashion design industry. In particular, the keywords INSPIRATION, GENIUS, IDEA, TALENT and VISION may be associated with the idea of highly talented, inspired and brilliant local fashion designers. The keywords READY-TO-WEAR and PRET-

268

A-PORTER, which are amongst the most frequently occurring lemmas, together with the keyword HIGH-QUALITY, emphasize the strong connections between Milan fashion, ready-to-wear and high-quality production. A strong association exists between the keywords FOUNDATION, PRADA and ART, which refer to the Fondazione Prada, a Milan-based institution co-chaired by Miuccia Prada and Patrizio Bertelli and dedicated to contemporary art and culture. To summarize, tweets on Milan and fashion are mostly associated with the local fashion design industry. In particular, they draw the attention to Italian traditional luxury fashion houses and to highly talented designers, as well as to the importance of ready-to-wear as main form of production. Moreover, several connections exist also between Milan, culture, art and fashion, and are mainly associated with the Fondazione Prada institution.

Figure 4.18. Multidimensional Scaling (MDS) map of keywords from tweets on Milan

Sources: Author's elaboration using the 'Co-Word Analysis and Concept Mapping' tool of T-LAB.
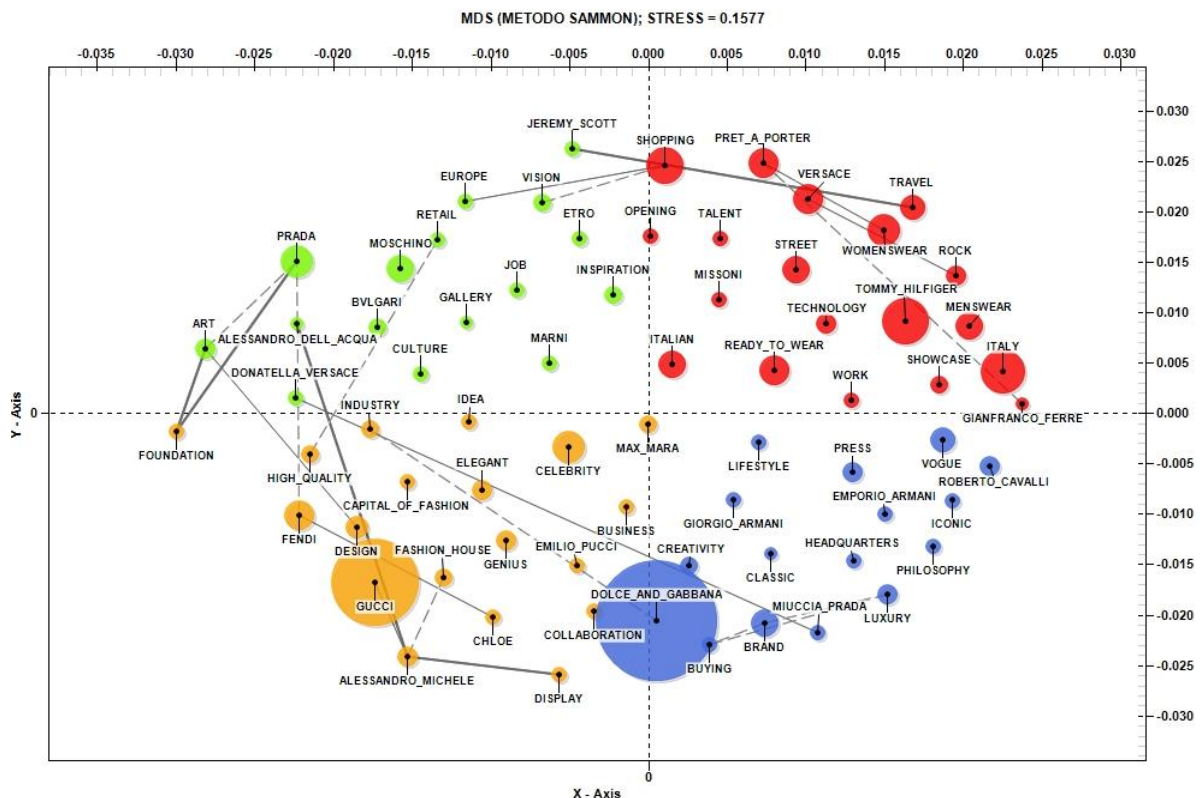
Figure 4.19 shows the MDS map of keywords from the sample of tweets on Paris and fashion. A large number of lemmas, including the most frequently occurring keywords, refers to luxury fashion houses (e.g., BRAND, LUXURY, FASHION HOUSE, HIGH-FASHION, COMPANY, BUSINESS). The French companies and designers that mostly occur in the sample of tweets are CHRISTIAN DIOR, YVES SAINT LAURENT, CHANEL,

GIVENCHY, LOUIS VUITTON, BALMAIN, LANVIN, CHLOE, HERMES, SONIA RYKIEL, ISABEL MARANT). Moreover, a number of lemmas is related to non-French fashion houses like VALENTINO (i.e., Italian), DRIES_VAN_NOTEN (i.e., Belgian), CALVIN KLEIN (i.e. American), STELLA MCCARTNEY and VIVIENNE WESTWOOD (i.e., British). The Spanish luxury fashion house BALENCIAGA and the British ALEXANDER MCQUEEN, which are part of the luxury conglomerate Kering, as well as the American fashion designer (i.e., VIRGIL ABLOH) who has been recently appointed as artistic director of the menswear collection of Louis Vuitton, are also represented in the MDS map. Moreover, the frequent occurrence of the lemmas ISEEY MIYAKE and KENZO, who are two internationally known Japanese fashion designers, and the keyword TOKYO emphasize the strong connections between Japan fashion culture and Paris.

Most importantly, all these lemmas are in close proximity to the keyword HAUTE COUTURE and ART, which are amongst the most frequent keywords in the sample of tweets, and also the less frequently occurring lemmas READY-TO-WEAR. DESIGN, CREATIVITY, PRET-A-PORTER and HANDMADE. The size of the lemma SHOPPING, together with the presence of less frequent words like STREET, TRAVEL, RETAIL, TOUR EIFFEL and ARCHITECTURE, emphasize the importance of shopping opportunities and fashion tourism in the mental associations between Paris and fashion. Moreover, the keywords PARISIENNE, ELEGANT, EXCLUSIVE, ICONIC and LIFESTYLE may be associated with the collective imagination of a renowned Parisian lifestyle for fashion. In sum, Paris is described on Twitter as a fashion city mostly populated by local and international luxury fashion houses, with a particular focus on haute couture, artistic expression, and the myth of a unique 'Parisienne' style. Shopping experience and fashion tourism also emerge as key elements in the symbolic representation of this major fashion capital.

Figure 4.19. Multidimensional Scaling (MDS) map of keywords from tweets on Paris
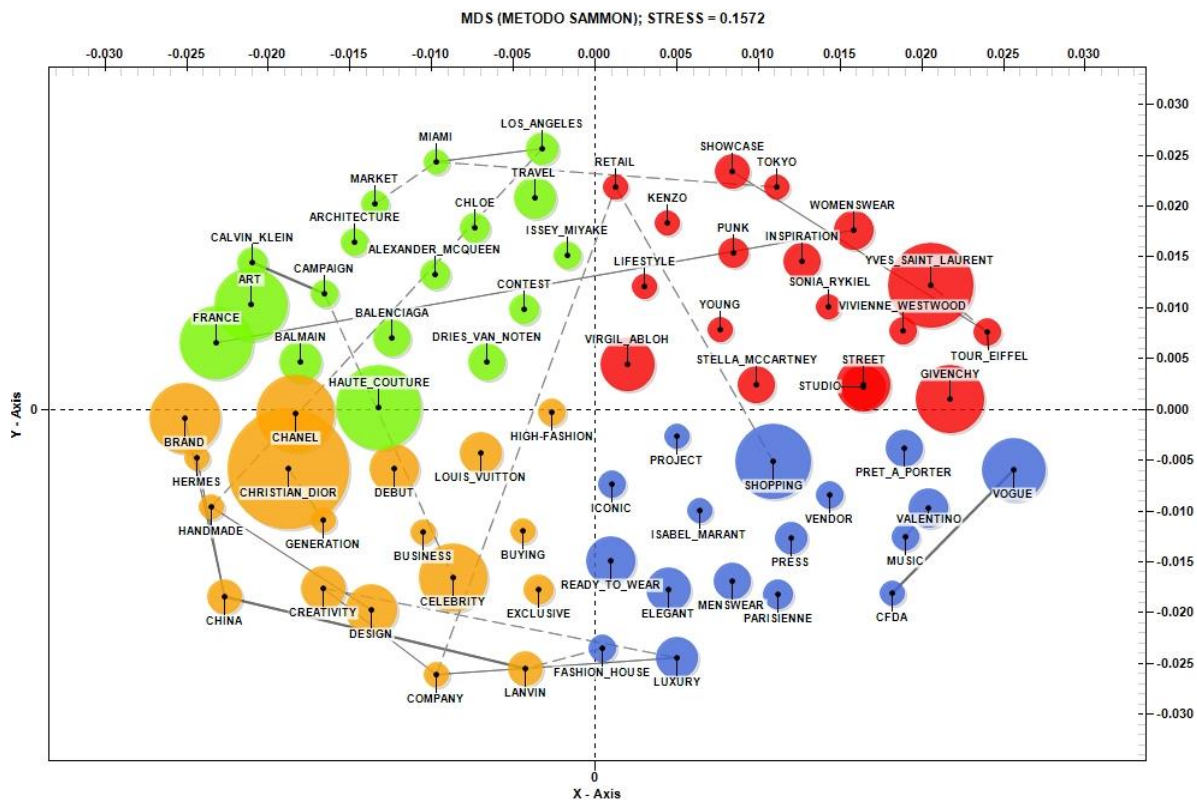
Sources: Author's elaboration using the 'Co-Word Analysis and Concept Mapping' tool of T-LAB.

To conclude, it is possible to emphasize some similarities and differences in the way fashion's world cities are 'narrated' on social media, and to make some consideration about people's perception of these fashion centres. Firstly, it is important to highlight the peculiarity of the discourse of London as a fashion centre when compared to other fashion's world cities. From the analysis of tweets on London and fashion, there has emerged a rich and varied fashion ecosystem, which mainly focuses on the local education system, shopping opportunities and fashion events that are aimed at showcasing new global trends as well as original and diverse talent. The local industry shows strong connections with creativity, art and craftmanship, as well as with the film and media industry, and the royal family. However, there are only a few connections with British fashion houses and designers, with Burberry dominating the local scene. Overall, these results are in line with what has emerged from the analysis of London carried out from a supply-side perspective and with the one focused on Twitter data that were collected during the LFWM.

The image of New York as a fashion centre is the closest to the London's one, particularly in terms of its focus on the arts, the education system and the launch and discovery of new

271

designers, as well as for its strong connections with the film and media industry. However, the representation of New York displays also strong associations with the local industry and with the name of several established and internationally renowned American fashion houses and designers. Unlike London and New York, the symbolic image of Milan and Paris is mainly associated with the name of many luxury fashion houses and the typology of local production. Paris is described as a fashion centre populated by a large number of local and international luxury fashion houses, with a particular focus on haute couture, artistic expression and the myth of a unique 'Parisienne' style. The same as with London, shopping opportunities and fashion tourism are also regarded as key elements in the symbolic representation of this major fashion capital. Lastly, tweets on Milan and fashion emphasize the strong focus on Italian traditional luxury fashion houses and highly talented designers, with particular reference to ready-to-wear and high quality of production. There emerge also important associations between the city, fashion, art and culture.

The results of this explorative analysis are fairly in line with what has been discussed in the theoretical section of the dissertation that analyses the main similarities and differences between fashion's world cities. New York and London tend to act as major cities for fashion education, the debut of emerging designers and the launch of new trends. Moreover, they show the strongest connections with the film and media industry. Unlike the other cities, the only image London is strongly linked to fashion-related events and, unexpectedly, to craftsmanship, which may be due to some recent local initiatives aimed at promoting a new type of artisanal fashion. The most frequent associations between art and fashion are shown in the representations of New York and London (and to a lesser extent in Paris and Milan), where several museums are also mentioned amongst the keywords. Paris and Milan have a major consolidation in the traditional luxury and fashion industry, and their image is mainly focused on the quality, tradition and peculiarity of local fashion production (i.e., ready-to-wear and haute couture). In particular, Paris is associated with a large number of international and non-French fashion luxury houses, affirming its supremacy in the luxury fashion industry upon the other fashion capitals. Lastly, London and Paris (and to a lesser extent New York) have stronger associations with creativity and a larger reputation for being major centres of fashion consumption and preeminent locations for shopping.

4.8. Conclusions

The chapter has presented an analysis of the fashion city of London from a 'demand-side' perspective, which explores the discourse of this fashion centre on the social media platform Twitter. The aim of the study was to complement the previous descriptive analysis of London carried out from a 'supply-side' perspective and to suggest another methodology to position a fashion centre in the 'ideal-types' framework. The same methodology was then applied to an explorative study that draws upon Twitter to compare the fashion's world cities. The heterogeneity and complexity of the fashion city idea is fully reflected in the huge variety of methodologies that can be adopted to analyse fashion centres. This concept lies not only in material and tangible elements like the presence of the industry or traditional garments, but also in mental representations associated with symbols, images, and narratives about fashion cities. The previous analysis of London has highlighted the main elements that have led to its formation, evolution, and actual nature. London has been described as a creativity-oriented fashion city, which tends towards the ideal type of the symbolic fashion city, focusing on fashion education, fashion retail, fashion journalism, fashion event organization, and museum curation for the creation of symbols that perpetuate its status.

The analysis carried out in this chapter draws a picture of London as a fashion city based on people's perception rather than on structural elements. A sample of 30,362 tweets including both the words 'London' and 'fashion' was collected over a period of three weeks in June 2017. Tweets were then cleaned and analysed through different selected techniques concerning statistical associations among words and aimed at exploring meanings embedded in textual data: 'Multidimensional Scaling Analysis', 'Semantic Network Analysis', 'Thematic Analysis of Elementary Contexts', and 'Word Associations Analysis'. Each analysis has contributed to highlighting different aspects of the discourse of London as a fashion city. The combination of their results enables the identification of latent structures of mental and social representations linked to people's perception of London and fashion on Twitter. The discourse emerging from tweets has been analysed through the ideal types' dimensions of 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'. The majority of tweets under investigation refer to the 'promotional media system'. However, it is also possible to discuss people's perception of the other dimensions.

What emerges from the analysis is fairly consistent with findings from the previous

descriptive study and confirms London as a creative fashion centre tending towards the 'symbolic ideal type'. The discourse on Twitter describes London as a fashion city primarily focusing on local fashion events and exhibitions, and with a highly creative approach to fashion in all the dimensions considered. However, some results have highlighted new aspects of this fashion centre. People's perception of London as a fashion city primarily focuses on local fashion events, particularly the London Fashion Week, which is regarded as an international leading platform for the launch of highly creative, innovative and original fashion talent. New findings shed light on important symbolic associations between this event and other major fashion cities in the world. The importance of fashion exhibitions held in local museums is also highlighted in the analysis. Overall, local fashion events are perceived as particularly significant for dictating new inspiring trends throughout the world by means of rich promotional media system comprised both of traditional and digital communication channels. Not only local fashion press but also international fashion magazines contribute to disseminating a narrative about London and fashion.

It emerges the presence of a strong institutional system in support of local fashion events and of the designer fashion industry. This is comprised not only of support institutions and education providers like the British Fashion Council and London College of Fashion, but also of media, retailing and museums. Local fashion houses have strong associations with other creative industries, as well as with aesthetic and artistic values. Some tweets emphasize interesting connections between local fashion production and craftsmanship, creativity and innovativeness. London is perceived as a place of attraction of young fashion designers from all over the world, who have the opportunity to enter the local fashion scene through important learning and showcase opportunities. Innovativeness, freedom, energy, diversity, originality, and avant-garde characterize human capital specialised in fashion design. Many tweets highlight local fashion styles like street-style, rock, punk, vintage, as well as a more traditional British style. London's fashion education system emerges as an important platform not only for training but also for showcasing international graduate fashion students through events like the Graduate Fashion Week. It is symbolically associated with art, creativity, and culture. Lastly, some tweets draw attention to the connections between retail and fashion tourism, where specific London retailers, department stores and flagship stores are mentioned as main locations for shopping.

The chapter can also be interpreted as an attempt to measure forms of symbolism that are connected to fashion in contemporary urban environments. In particular, the final explorative

study on fashion's world cities has sought to validate the Twitter methodology as a means of analysing contemporary fashion centres and has reinforced the evidence needed to discuss the main elements that are part of the symbolic representation of fashion cities. Moreover, the replication of the Twitter's analysis for London during another type of major fashion event enables a comparison between final results. To execute the comparative analysis, tweets on the fashion's world cities were collected during the Women's Fashion Week event and the content was then analysed through the MDS technique. Although this event, as in the case of the LFWM, functions as a central junction for meaning circulation on Twitter, the common and repeating keywords related to this event were excluded from the analysis in order to highlight the specificities of each city.

Firstly, it is important to highlight that results from the sample of tweets on London are in line with what has emerged from the single study discussed above. However, the comparative analysis has emphasised how the image of London as a fashion centre differs from the representation of other fashion capitals. London has emerged as the more diverse, varied and comprehensive fashion city in terms of elements that form its symbolic representation on social media. The main concepts emerging from the new sample of tweets are equally associated with the significance of the local education system, shopping opportunities and major fashion events. The local industry shows strong connections with creativity, art and craftmanship, as well as with the film and media industry, and the royal family. However, there are only a few connections with British fashion houses and designers, with Burberry dominating the local scene. Conversely, the symbolic representations of New York, Milan and Paris are less diversified in terms of content of tweets, which is mainly focused on local and international fashion designers and houses. Future research should consider repeating the comparative analysis in a period for data collection without major events in order to compare results.

Discussion and general conclusions

Local governments and academics have recently devoted increasing attention to the fashion city idea as a strategy for the growth and revamping of major and minor cities. Nowadays, in addition to established fashion's world cities, a rising number of cities across the world have achieved the status of 'second-tier' cities of fashion. The growing and crucial importance of fashion in urban development strategies, as well as the increasing heterogeneity of fashion centres, has created the need to enhance the knowledge of what constitutes a fashion city. To this day, either in academic or local policy field, little attention has been paid to defining the key elements that form a contemporary fashion centre. In view of these considerations, the aim of the present dissertation was to contribute to furthering the understanding of the meaning of this concept, and to potentially identifying distinctive models of fashion centres. Further questions have been raised as to the best methodologies to study contemporary fashion cities and to position these centres in the specific framework of analysis. The research was structured in four chapters addressing three main objectives.

The first objective of this dissertation was to systematize the existing body of cross-disciplinary academic literature on the topic into a precise theoretical framework. To meet this objective, Chapter 1 presented a state of the art of fashion's relation with cities by adopting a specific 'creative approach'. The analysis of fashion design clusters and their interconnections with CCIs, as well as of locational behaviour of fashion designers in cities has led to direct attention to a particular example of fashion centre that has been termed as the 'creative fashion city'. This specific model of fashion centre is defined as a local creative ecosystem centred on the designer fashion industry as a CCI, cultural and creative industries, and a creative class of fashion designers. In this kind of urban context, a series of cultural actors, institutions, and favourable conditions support the creation, materialization, and commercialization of fashion design in the city.

Firstly, a highly creative and artistic atmosphere, a broad range of cultural activities, as well as creative industries and people, help stimulate creativity, artistic inspiration, and innovation for the design concept. In particular, the presence of 'third places' like coffee shops, bookstores, open-air markets, and various types of events provides opportunities for cultivating important social relations, promoting knowledge exchange, and acquiring visibility in the industry. Secondly, several local actors and institutions like manufacturing firms, high-skilled workers, specialised service providers, and training schools contribute to

supporting the materialization of fashion design. Thirdly, a range of intermediaries including fashion retail, wholesale, journalism, and event-organization like trade fairs and fashion shows help commercialize fashion design. These elements are closely intertwined and form a complex ecosystem where local creativity, fashion culture, and tacit knowledge are generated over time in the form of place-based associations that continuously reinforce the status of the 'creative fashion city'.

The theoretical framework presented directs attention to a particular kind of fashion city, which focuses predominantly on the designer fashion industry, and is described as an example of the creative city paradigm. Obviously, what has been described as 'creative fashion city' is only an abstraction of fashion centre that accentuates some key elements by positing creativity at the centre of urban economic development. None of the existing fashion centres corresponds exactly to this model, but the theoretical framework is a helpful means of organizing the exiting literature on the topic and of placing emphasis on the importance of fashion's relation with creativity and the urban. In this specific approach, fashion design is primarily regarded as a component of broader CCIs-oriented policies. In this sense, fashion design is isolated from the wider complexity of the fashion industry, where activities like fashion manufacturing, retailing, education and event organization equally play a significant role in the development and promotion of fashion centres. In other words, this approach tends to underplay the current diversity of fashion cities, which over time have drawn upon elements other than the mere fashion design.

In this respect, the second objective of this dissertation was to identify a framework of analysis that might address the heterogeneity and complexity of contemporary fashion centres. To achieve this objective, Chapter 2 suggested an analytical framework for thinking about the diverse and multifaceted nature of fashion's relation with cities. This study moved away from the mere focus on fashion design, and argued for the need to look for multiple, differentiated, and changing categories of fashion centres. In fact, while nowadays there is a consistent overall trend of weakening industrial platform and strengthening symbolic economy, contemporary fashion centres exhibit distinctive characteristics and development trajectories, which have differently worked through combinations of manufacturing, design activities, the symbolic economy, and consumption. An extensive analysis of studies on fashion's world cities and 'second-tier' cities of fashion has helped identify commonalities and differences in the formation and current nature of fashion centres.

The historical development and current trajectories of fashion's world cities, particularly New

York, Milan, Paris, and London, have been distinguished on the basis of the city's orientation towards 'material' or 'symbolic' models of fashion production, and on the remaining significance of specialist artisanal production networks. Furthermore, two broad tendencies within strategies to develop and promote 'second-tier' cities of fashion have been identified: one focused on fashion design as a form of CCI and notions of urban creative clusters, the other one associated with place branding, symbolic production and promotion of cities as key sites of consumption in fashion's international order. The analysis has also revealed the potential of centres of manufacturing activity to become the sites of more complex fashion cities, drawing upon synergies between production, design and wider local cultural characteristics.

From the above discussion, three distinct broad tendencies in the relationship between fashion and cities have emerged. Drawing upon Weber's ideal type approach, these tendencies have been theorized in terms of the 'ideal types' of the 'manufacturing fashion city', 'design fashion city', and 'symbolic fashion city'. These ideal types highlight hypothetical models of fashion centres and are distinguished on the basis of the key 'dimensions' of 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system'. Firstly, the 'manufacturing fashion city' has a local economic system primarily focused on an extensive apparel productive sector, whose variants include mass production systems and extensive flexible workshop-based economic models. Secondly, the 'design fashion city' is closest to conventional models of the CCIs, and to the 'creative fashion city' discussed in the theoretical framework. The central element of its local economic structure is the designer fashion industry, often geographically concentrated in distinctive urban creative clusters. Thirdly, and finally, the 'symbolic fashion city' ideal type has a radically different economic structure, in which the production of apparel and even the design of clothing for production are absent or very limited. Instead the city itself is branded as a place of fashion, and 'commodifying' the experience of the city becomes a primary economic activity.

Of course, there are no pure examples of these ideal types in existing or historic fashion centres. In all of the examples of fashion cities there is an overlap of elements from each of the three models. Moreover, fashion cities at different points in time may occupy distinct positions and tend towards diverse ideal types. In this sense, the ideal type construct has been often criticised for being an ambiguous and over-simplified method of analysis. However, although ideal types are only hypothetical constructions, they are formed from existing facts

and have therefore considerable analytical power. At this point, the question that has arisen was how 'real' fashion cities may be positioned in the 'ideal-types' framework and, in other words, how these centres may be studied and examined in depth. The complexity and diversity of urban fashion formations, which has widely emerged from the analysis, is fully reflected in the variety of methodologies that can be now adopted to analyse contemporary fashion centres. Particularly nowadays, the concept of the fashion city lies not only in 'tangible' elements like the presence of manufacturing bases or fashion design industries, but also in place-based symbols, images and narratives that act as powerful image-creators of fashion centres.

Thus, the third and final objective of this dissertation was to investigate how contemporary fashion centres might be studied, analysed and positioned in the analytical framework discussed above. Chapter 3 and Chapter 4 are intended as two exploratory exercises to position a 'real' fashion city in the 'ideal-types' framework and have suggested two different and complementary methodologies to study contemporary fashion centres. As explained in the introduction of this dissertation, in these two chapters, priority was given to the identification of a comprehensive methodology able to address the multifaceted nature of fashion centres, rather than to a narrower comparative study aimed at validating the analytical framework. Thus, the fashion city of London was analysed both from a 'supply'- and 'demand-side' perspective to capture all the elements that are behind the material and symbolic formation of a fashion centre. More specifically, the dimensions of 'economic structure', 'human capital', 'education system', 'institutional infrastructure', 'retail environment', and 'promotional media system' were explored both in terms of 'material' elements and of 'symbolic' perception of people.

Chapter 3 presented a first descriptive study of London from a 'supply-side' perspective, which has emphasized the key elements that underlie its historical development, transformation, and current nature. A qualitative and quantitative analysis was carried out through the execution of 23 semi-structured interviews with key actors from London's fashion ecosystem, as well as by means of statistics and policy documents from local governments, specialist institutions, and research centres. Chapter 4 presented a second analysis of London from a 'demand-side' perspective, which explored the discourse of this fashion centre on the social media platform Twitter. A combination of selected techniques, concerning the statistical associations among words, was used to explore meanings embedded in tweets and to highlight the symbolic narrative about London as a fashion city. This chapter

proposed also a first explorative analysis comparing fashion's world cities using Twitter data and aimed at assessing the validity of this methodology as a means of studying the symbolic representation of contemporary fashion centres.

This first analysis executed from a 'supply-side' perspective draws a picture of London as a fashion city focused on high levels of creativity and forms of urban symbolism that affect its entire local fashion ecosystem. Retail and distribution dominate the local fashion industry, whereas the fashion design sector is relatively narrow and not adequately supported by a tiny, fragmented, and non-specialised manufacturing base. London has a reputation for a creative and conceptual approach to fashion, often regarded more as a form of artistic expression than physical production. Local fashion designers tend to produce collections that are noted for originality, experimentation, and idiosyncrasy, rather than for wear-ability and marketability. The education system is a powerful engine of the local economy, attracting highly talented international students, and incubating creative talent. Specialist HEIs place significant emphasis on 'creative' fashion design, with pedagogic approaches that emphasize creativity, aesthetic values, and symbolic aspects of the fashion process (e.g., fashion marketing, journalism, retail), rather than technical skills associated with production processes, or managerial competences needed to establish and run successful businesses. London lacks large global fashion corporations capable of absorbing the creative talent produced locally, with major retailing companies and other creative industries more likely to employ graduates.

London's success as a fashion centre lies in a powerful retail sector, as well as in a strong promotional apparatus that has contributed to the communication of important place-based narratives. London Fashion Week is part of world's leading shows, and the success of London-trained designers has emphasised its reputation as a source of highly creative talent. Local museums have been very important in staging major fashion exhibitions, emphasizing London's creativity. Also, the institutional infrastructure has tended to support more creative and symbolic aspects of the industry than physical production. In short, the key elements of this fashion centre belong primarily to the symbolic economy. Forms of urban symbolism, particularly linked to the education system, fashion retail, event-organization, fashion journalism, and museum curation, significantly outweigh the fashion design industry or the production of garments in cementing London's reputation as a fashion centre. London can be described more as a place where having access to unique creative learning experience, showcasing opportunities, and shopping experiences, than where 'producing' or 'doing business'. In this sense, from this first analysis, it is possible to conclude that London tends

towards the ideal type of the 'symbolic fashion city'.

The second analysis, which was carried out from a 'demand-side' perspective, draws a picture of London fairly consistent with findings from the above study. London is perceived as a highly creative fashion centre focused predominately on major fashion events and exhibitions. Of course, most tweets referred to the dimension of 'promotional media system', particularly to the London Fashion Week Men's event that was held in the period of data collection in June 2017. However, tweets on this and other events functioned as central junctions for meaning circulation and enabled the exploration of people's perception of other dimensions like 'economic structure', 'education system' and 'retail environment'. The analysis revealed how the London Fashion Week is perceived as an extremely important platform for the launch of highly creative and innovative talent, and for dictating new inspiring trends throughout the world. This event has strong symbolic connections to other major fashion cities and draws the attention on Twitter not only of local traditional and digital fashion press, but also and mainly of international fashion magazines. There emerges a local solid infrastructure in support of fashion events and local designers, which is particularly comprised of institutions like the British Fashion Council and education providers like the London College of Fashion.

London's fashion houses are symbolically connected to other local creative industries, as well as to aesthetic and artistic values. Some tweets emphasized the associations between local fashion production and craftsmanship, creativity and innovativeness. Freedom, energy, diversity, originality, and avant-garde characterize the local fashion environment, which is principally associated with extravagant fashion styles like rock, punk, and street-style. London is perceived as a place of attraction of young international talent in search of significant learning and showcasing opportunities. In this regard, London's fashion education system, which is symbolically connected to art, culture, and creativity, appears as an important means not only of training but also of showcasing graduates' collections through the Graduate Fashion Week's event. Finally, some tweets drew attention to the linkages between fashion retail and tourism industry, emphasizing particular local retailers, department stores, and streets as main attractions for shopping in London. In short, the analysis of people's perception shows an image of London as a fashion centre symbolically associated with creativity, originality, innovativeness, and artistic values, which affect the entire local ecosystem, particularly the nature of events, firms, institutions, and the education system. Therefore, also this second picture confirms the tendency of London towards the ideal type of the 'symbolic fashion city'. Results are also in line with what has emerged from the

explorative analysis that has compared fashion's world cities using Twitter data collected during the Women's Fashion Week event that was held in New York, London, Milan and Paris in February and March 2018. However, the comparative analysis has also emphasised how London is the more diverse, varied and comprehensive fashion city in terms of elements forming its symbolic representation on social media. In fact, the image of New York, Milan and Paris on Twitter is mainly focused on local and international fashion houses and designers, which emerge as key components in the imaginary context linking fashion to these cities.

The present dissertation has sought to contribute to broadening the knowledge and understanding of the fashion city idea in the contemporary scenario. In particular, it has investigated the significance of different kinds of position that fashion plays in urban economies, drawing attention to fashion's qualities as rather more than a conventional urban CCI. Obviously, there are examples of cities discussed earlier in the work, such as Auckland, Copenhagen, and Toronto, which have focused on the development of fashion design clusters to become acknowledged fashion centres. However, there are other choices and contexts that have made a rather different kind of strategy more likely. In this regard, the present research has identified three broad tendencies in the contemporary relationship between fashion and the urban, which have been theorized in the ideal types of the 'manufacturing fashion city', 'design fashion city' and 'symbolic fashion city'. While these ideal types are only hypothetical abstractions, they can function as an important heuristic device to think about the distinctive characteristics of fashion centres and speculate about future development pathways.

It has been witnessed a strong tendency towards the increasingly widespread adoption of forms of urban symbolism in the revamping of established fashion cities, and the development and promotion of newer ones. The symbolic economy for fashion is now regarded as a key element in the survival and growth not only of fashion centres tending towards the 'symbolic fashion city', but also of those focused on the fashion design industry or fashion manufacturing. Symbolism has become an essential means of cementing the reputation of contemporary fashion centres, either specialised in image-making activities, fashion design or fashion production. In this context, it becomes important to analyse contemporary fashion centres drawing upon not only the material elements behind their formation but also their symbolic representation. For this purpose, the present work has proposed two different methodologies: the former focused on the execution of semi-structured interviews with key actors of the local fashion economy and on the analysis of statistics and

policy documents to study the material elements that form a fashion centre, the latter based on textual analyses of Twitter data to examine its symbolic representation. The two analyses carried out on London from a 'supply'- and 'demand-side' perspective draw a similar picture of this fashion centre, which turns out to be focused predominantly on creativity and image-making activities. This result emphasizes how the symbolic narrative and the perceived image of this centre reflect the real characteristics of this fashion city. Symbolism appears therefore to be connected to the main elements that underlie the current nature of a fashion centre. In this regard, there is the need to analyse people's perception of a more manufacturing-oriented fashion centre to investigate whether its perceived image also corresponds to the key characteristics of the city.

The ideal type approach has also some policy implications. In particular, it shifts away from the dangers of reading other cities as simply 'second tier' or developing versions of established models set by fashion's world centres. In this sense, it complicates the kind of simplistic 'tool-kit' approach associated with city-boosterism, which has characterized some attempts to make cities into the 'new' Paris, New York or London. Despite the growing significance of what has been termed as the 'symbolic fashion city', it is important to think of fashion as more than just a resource for place branding. Fashion has been a key element in the vibrancy of urban cultures, and there are dangers in any analysis that restricts its relationship with cities only to different forms of economic strategy. The accentuated ideal type of the 'symbolic fashion city' faces the risks of what can be described as a 'hollowing-out' of the fashion city, which is detached not only from making and designing clothes, but also potentially from specific rooted urban cultures connected to fashion. In this sense, urban development strategies oriented towards the development of impressive luxury fashion malls and duty-free outlets do not make a fashion city, but there is the need for urban vibrancy, difference, and cultural dissent. Perhaps the most important lesson is not about fixed strategies for the development of the fashion city, nor even that the most successful fashion cities have long worked through the synergies between material production, creative design and symbolic production. The development of fashion centres also depends on active urban fashion cultures, and each fashion policy strategy needs to be specifically adapted to different historical and cultural urban contexts.

The main limitations of the present dissertation and possible directions for future research are discussed below. Firstly, it is important to underline the lack of a comparative study between distinctive typologies of fashion centres focused on manufacturing, fashion design, or

symbolism. In fact, the aim of the empirical part of the research was not to provide a test of validity for the analytical framework of ideal types. Instead, due to time constraints, it has given priority to the identification of a specific combined methodology for analysing the complexity and diversity of contemporary fashion centres, by focusing on the study of a single fashion city. However, the explorative analysis that compares fashion's world cities using Twitter data can be interpreted as a first attempt in the direction of validating the 'ideal types' framework and provides a benchmark for the single study of London.

Secondly, some other limitations can be found in the two analyses of London carried out from a 'supply'- and 'demand-side' perspective. The first of these analyses has been particularly constrained by difficulties in collecting detailed statistics on the fashion industry for the specific geographical area of London. This issue has been partially solved thanks to the support of the qualitative part of the research, which has filled possible gaps in the study through an in-depth interview process with key actors from the local fashion ecosystem. The second of these analyses has gathered data from the social media platform Twitter in a period that included the three-day event of the London Fashion Week Men's. Consequently, many of the tweets collected in these days focused on this event, introducing some possible bias in the reconstruction of the discourse of London as a fashion city. The same limitation can be found in the comparative analysis between fashion's world cities that draws upon Twitter data collected during the Women's Fashion Week events. However, the inclusion of a major fashion event in the period of data collection has enabled the extraction of a much larger number of tweets, which have also provided additional information other than those linked to the specific event.

In light of these limitations, future research should firstly consider replicating the empirical analysis carried out for London in other typologies of fashion centres, with the aim of validating the analytical framework of the ideal types. The new units of analysis should be picked among other major fashion centres across the world, which are similar to London in terms of reputation in fashion but have a seeming diverse nature in terms of key characteristic elements. This would allow for a comparison between fashion centres that potentially tend towards different ideal types, analysing the dimensions in diverse urban contexts and supporting the analytical framework presented in this research. As an example, a comparison between Florence and London could be particularly significant to emphasize diversities and commonalities in fashion centres that exhibit a different focus on manufacturing and symbolic elements. The same framework and related methodology could be also adopted for the study

and comparison with minor and newer fashion centres that have focused on diverse elements for their development. Other suggestions for further research concern the analysis of the symbolic representation of fashion cities. In this respect, it might be interesting to replicate the analysis of London that draws upon Twitter data by excluding any major fashion event from the period of data collection to compare results. The same applies to the explorative comparative analysis between fashion's world cities, which should be replicated using data collected in a period with no significant events. Moreover, this analysis should be expanded and strengthened through the inclusion of a larger variety of techniques for the analysis of textual data.

Appendix A: Semi-structured interview guide of London's case study

INTRODUCTION

1. Recording interview (ask for permission)

2. Introducing myself and research

3. Ask respondents to introduce themselves, their organization, and function

GENERAL QUESTION (Personal opinion on London as a fashion city)

Q1. What are the main elements that make London a fashion city?

Q2. What are the strengths and weaknesses of London when compared with other fashion capitals?

Different questions have been asked to representatives of each dimension. The following section shows the main questions and objectives of the interview process for each dimension under investigation.

EDUCATION SYSTEM: Interviews with heads of leading London's based fashion schools. Objective: to understand the role, nature, and characteristics of fashion education in London.

QE1. What are the distinctive characteristics of fashion education in London?

QE2. What is the ethos of fashion training in your institution? Does it differ from other fashion schools in London?

QE3. How does your institution contribute to supporting graduate students and London-based fashion designers? Do you collaborate with other education providers, support institutions or retailers?

QE4. Does your academy emphasize business collaboration? Do your graduate students easily find access to London's fashion industry after completing their studies? What kind of employment do they mostly find (e.g., freelance, permanent employment, own fashion label)?

QE5. Does your institution play a role in supporting the image of London as a fashion city? If so, how?

HUMAN CAPITAL: Interviews with independent fashion designers. Objective: to analyse the reasons of attraction and retention of fashion designers in London.

QH1. What are the factors that mostly contribute to the attraction of fashion designers to London?

QE2. Why did you choose to establish your own business in London?

QH3. What is your stance on London-based fashion production? Do you collaborate with local fashion manufactures? If not, why?

QH4. Do local institutions play a role in supporting fashion designers? If so, what kind of support do they provide?

QE5. Did you graduate from a London-based fashion school? If so, what are the distinctive characteristics of fashion education in London? What kind of learning do local fashion schools emphasize?

QE6. Did local education system support you in establishing your own business or in finding a different type of employment?

INSTITUTIONAL INFRASTRUCTURE AND ECONOMIC STRUCTURE: Interviews with representatives of support institutions for local creative industries, fashion designers, and fashion manufacturing, as well as of manufacturing firms. Objective: to understand what forms of local support are provided in the local fashion industry, as well as the nature, impact, and future of fashion manufacturing in London.

SUPPORT INSTITUTIONS

QI1. How would you define the role played by your institution in supporting London's fashion industry? What kind of support is mostly provided?

QI2. What is the mission of your institution? How does it differ from other fashion-related institutions in London?

QI3. How does your institution contribute to supporting London-based fashion designers, fashion design firms or fashion manufacturing? Do you collaborate with other fashion-related institutions?

MANUFACTURING FIRMS

QI3: What is your take on London-based fashion manufacturing?

QI4. How would you define the current role and impact of local fashion manufacturing on the broader fashion industry? Looking back in time, has this role changed?

QI5. What is the current relationship between London-based fashion manufacturing and fashion designers?

QI6. What kind of customers does you firm/institution serve?

Other questions were specifically adapted to the functions and characteristics of the different institutions and firms under analysis.

PROMOTIONAL MEDIA SYSTEM AND RETAIL ENVIRONMENT: Interviews with fashion curators of London's museums, and representatives of local media firms and retailing. Objective: to analyse what are the main fashion-related promotional activities in London.

MUSEUMS

QM1. How would you define the contemporary relationship between fashion and art in London?

QM2. Does art contribute to supporting the local fashion industry? If so, how? What is the role of museums?

QM3. Has this relationship changed looking backward?

QM4. What kind of fashion collections does your museum host? Are these part of permanent or temporary exhibitions?

QM5. How did your museum come up with the idea of establishing a dedicated 'fashion' section?

QM6. Do you collaborate with other fashion-related institutions, fashion designers or fashion education providers?

MEDIA

QP1. What is the mission of your company?

QP2. Does your company contribute to supporting London-based fashion designers? If so, how?

QP3. How does your institution contribute to promoting the image of London as a fashion city?

QP4. Do you collaborate with other London-based fashion-related actors?

RETAILING

QR1. What are the distinctive characteristics of fashion retailing in London?

QR2. What role does fashion retailing play in the local economy?

QR3. Do you support London-based fashion designers? If so, how?

QR4. Do you collaborate with other local institutions or take part in activity in support of the local fashion industry?

Other questions were specifically adapted to the functions and characteristics of the different museums, media and retailing firms under analysis.

CONCLUSIONS

4. Ask for additional topics for discussion that could be relevant for my research

5. Ask for other people who could be interested in being interviewed

6. Thank for the availability (CLOSE)

Appendix B: Additional tables and figures

Table B.1. Number of captures, tweets and retweets by day of collection (9th – 30th June 2017)

Day	Number of captures	Number of tweets	Number of retweets	Percentage of tweets	Percentage of retweets
9-Jun	921	572	349	62%	38%
10-Jun	636	433	203	68%	32%
11-Jun	2,490	1,247	1,243	50%	50%
12-Jun	3,165	1,654	1,511	52%	48%
13-Jun	3,510	1,998	1,512	57%	43%
14-Jun	3,323	1,318	2,005	40%	60%
15-Jun	2,639	961	1,678	36%	64%
16-Jun	1,596	823	773	52%	48%
17-Jun	1,113	575	538	52%	48%
18-Jun	754	421	333	56%	44%
19-Jun	1,009	535	474	53%	47%
20-Jun	953	591	362	62%	38%
21-Jun	1,035	589	446	57%	43%
22-Jun	962	604	358	63%	37%
23-Jun	937	585	352	62%	38%
24-Jun	803	496	307	62%	38%
25-Jun	713	415	298	58%	42%
26-Jun	689	418	271	61%	39%
27-Jun	598	355	243	59%	41%
28-Jun	1.015	625	390	62%	38%
29-Jun	1,009	669	340	66%	34%
30-Jun	492	356	136	72%	28%
Total 3 weeks	30,362	16,240	14,122	53%	47%

Sources: Author's elaboration using data (i.e., tweets) collected through NCapture.

Table B.2. Cosine coefficients of Word Associations (WA) for the lemma FASHION WEEK

Lemma	Cosine Coefficient	Occurrences	Co-occurrences	Chi-Square
LONDON_FASHION_DESIGNERS	0,224	946	556	1.011,46
STREET_STYLE	0,224	609	446	1.196,64
BACKSTAGE	0,206	343	309	1.147,62
MAGAZINES	0,205	457	355	1.046,17
TRENDS_FROM_LONDON	0,198	316	284	1.050,11
LONDON_FASHION_COMPANIES	0,166	726	362	465,20
APPAREL	0,144	663	300	307,19
TRENDS	0,142	757	316	264,45
FOOTWEAR	0,138	346	207	382,90
PRESS	0,133	444	226	301,38
DESIGNERS	0,121	712	261	150,21
SHOWCASE	0,108	288	148	200,58
DEBUT	0,096	79	69	242,46
INSPIRATION	0,095	205	110	163,00
GRADUATE_FASHION_WEEK	0,093	107	78	204,62
PHOTOGRAPHY	0,092	562	176	57,79
LONDON_RETAILERS	0,091	172	96	154,09
VIVIENNE_WESTWOOD	0,090	206	104	135,28
SHOPPING	0,087	86	65	181,10
EVENT	0,085	500	153	45,58

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: Occurrences are related to the total amount of ECs that contain Lemma. Co-occurrences refer to the total amount of EC, where Lemma and FASHION WEEK are associated. Chi-Square is the value concerning the co-occurrence significance.

Table B.3. Cosine coefficients of Word Associations (WA) for the lemma LONDON FASHION COMPANIES

Lemma	Cosine Coefficient	Occurrences	Co-occurrences	Chi-Square
TELEVISION	0,210	55	42	1.479,38
COLLABORATION	0,207	77	49	1.422,99
STAGE	0,184	72	42	1.110,98
CASUAL	0,172	67	38	975,09
FASHION_WEEK	0,166	6531	362	465,20
HOLLYWOOD	0,134	15	14	608,21
AVANT_GARDE	0,131	26	18	570,98
OUTFIT	0,121	79	29	461,85
LEATHER	0,109	67	24	371,72
ART	0,105	252	45	306,97
VICTORIA_AND_ALBERT_MUSEUM	0,105	137	33	323,84
LAUNCH	0,088	151	29	216,12
FASHION_MAGAZINES	0,077	412	42	133,08
SUPPORT	0,073	94	19	150,60
BACKSTAGE	0,072	343	36	118,96
APPAREL	0,068	663	47	81,99
MUSIC	0,067	136	21	118,37
FILM	0,066	62	14	126,88
CATWALK	0,065	258	28	97,01
BRAND	0,062	389	33	78,11

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: Occurrences are related to the total amount of ECs that contain Lemma. Co-occurrences refer to the total amount of EC, where Lemma and LONDON FASHION COMPANIES are associated. Chi-Square is the value concerning the co-occurrence significance.

Table B.4. Cosine coefficients of Word Associations (WA) for the lemma DESIGNERS

Lemma	Cosine Coefficient	Occurrences	Co-occurrences	Chi-Square
SHOWCASE	0,295	288	134	2.850,29
EXHIBITION	0,249	274	110	1.988,47
LONDON_COLLEGE_OF_FASHION	0,203	161	69	1.336,26
BRITISH	0,126	127	38	491,14
FASHION_WEEK	0,121	6531	261	150,21
HOXTON	0,119	12	11	478,37
FASHION_SHOW	0,115	547	72	340,17
EMERGING_TALENT	0,110	61	23	385,37
SUPPORT	0,100	94	26	306,61
YOUNG	0,099	193	37	282,10
BRITISH_FASHION_COUNCIL	0,090	108	25	239,16
WORK	0,075	194	28	148,29
FASHION_RECRUITMENT_AGENCIES	0,067	60	14	135,02
MUSEUM_EXHIBITION	0,063	113	18	108,27
DEBUT	0,063	79	15	112,63
ART	0,061	252	26	85,96
CONNECT	0,058	150	19	84,15
LONDON FASHION DESIGNERS	0,054	946	54	32,47
STUDENTS	0,051	193	19	58,41
INSPIRATION	0,049	205	19	53,22

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: Occurrences are related to the total amount of ECs that contain Lemma. Co-occurrences refer to the total amount of EC, where Lemma and DESIGNERS are associated. Chi-Square is the value concerning the co-occurrence significance.

Table B.5. Cosine coefficients of Word Associations (WA) for the lemma EVENT

Lemma	Cosine Coefficient	Occurrences	Co-Occurrences	Chi-Square
BRITISH_FASHION_COUNCIL	0,254	108	59	2.152,21
LONDON_RETAILERS	0,211	172	62	1.453,50
LONDON_MUSEUMS	0,190	84	39	1.196,67
VINTAGE	0,128	49	20	534,20
VICTORIA_AND_ALBERT_MUSEUM	0,103	137	27	322,20
MUSEUM	0,092	160	26	247,45
FASHION_WEEK	0,085	6531	153	45,58
PRESENTATION	0,080	71	15	193,56
EXCITING	0,079	93	17	185,61
WILD	0,067	45	10	136,61
CELEBRATE	0,065	106	15	120,56
SALE	0,057	120	14	88,37
PHOTOGRAPHY	0,045	562	24	32,04
BOOKING	0,043	106	10	47,66
LONDON_FASHION_COMPANIES	0,043	726	26	23,77
FASHION_MAGAZINES	0,042	412	19	29,37
LAUNCH	0,040	151	11	36,33
UNITED_KINGDOM	0,038	198	12	29,80
CREATIVITY	0,036	154	10	27,69
ART	0,034	252	12	19,62

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: Occurrences are related to the total amount of ECs that contain Lemma. Co-occurrences refer to the total amount of EC, where Lemma and EVENT are associated. Chi-Square is the value concerning the co-occurrence significance.

Table B.6. Cosine coefficients of Word Associations (WA) for the lemma MUSEUM

Lemma	Cosine Coefficient	Occurrences	Co-occurrences	Chi-Square
VICTORIA_AND_ALBERT_MUSEUM	0,365	137	54	4.535,35
LONDON_MUSEUMS	0,276	84	32	2.591,43
CONTEMPORARY	0,250	96	31	2.119,35
MUSEUM_EXHIBITION	0,171	113	23	974,79
ART	0,169	252	34	936,52
CULTURE	0,139	39	11	653,02
EXHIBITION	0,110	274	23	377,59
BUYING	0,104	129	15	350,79
COURSE	0,100	75	11	329,55
OPENING	0,093	104	12	278,09
EVENT	0,092	500	26	247,45
BOOKING	0,077	106	10	185,97
EXCLUSIVE	0,067	166	11	137,73
CREATIVITY	0,064	154	10	122,27
STUDENTS	0,063	193	11	115,68
LONDON_COLLEGE_OF_FASHION	0,062	161	10	116,17
STREET_STYLE	0,054	609	17	73,08

Sources: Author's elaboration using the 'Word Associations' tool of T-LAB.
Notes: Occurrences are related to the total amount of ECs that contain Lemma. Co-occurrences refer to the total amount of EC, where Lemma and MUSEUM are associated. Chi-Square is the value concerning the co-occurrence significance.

Figure B.1. Degree distribution of the semantic network

Degree Distribution
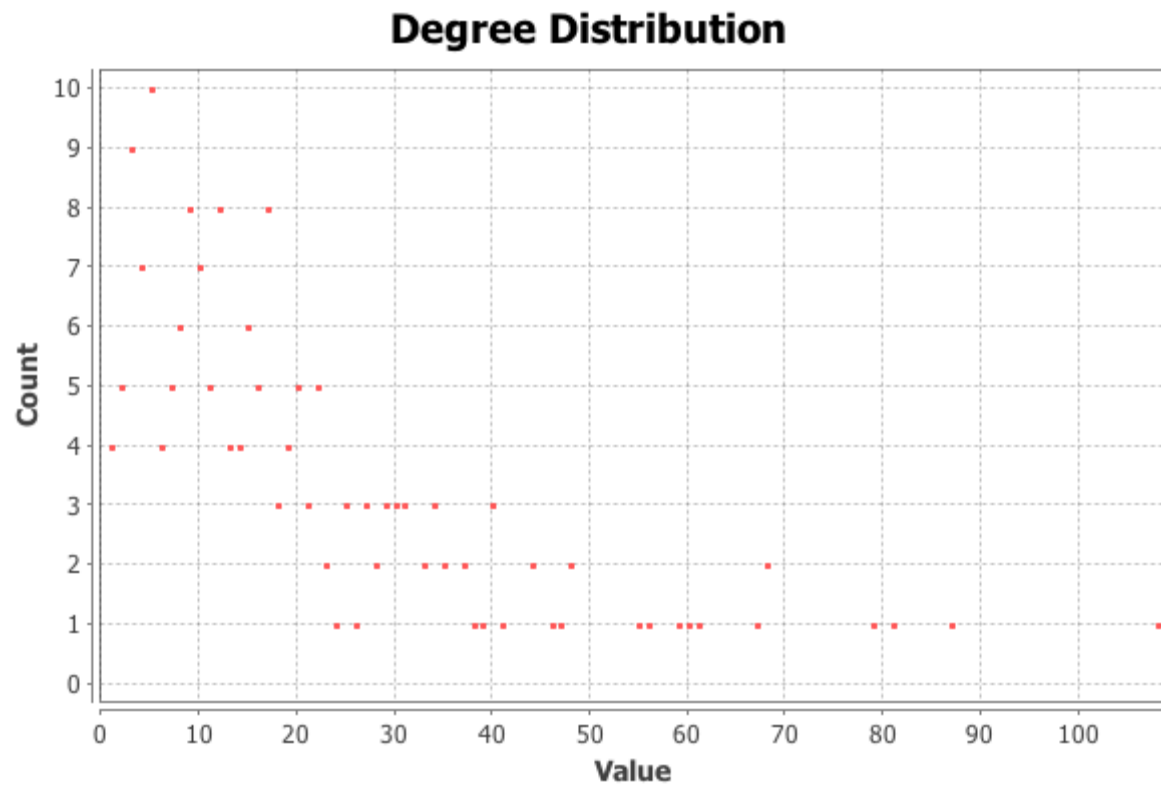
Note: the X-axis refers to degree and the Y-axis refers to the number of nodes.

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